Special collections librarianship is rapidly changing; new technologies, electronic reference services, and increased digitization of collections have profoundly affected all areas of special collections work. It has been noted that special collections have moved out of the 'treasure room' and into the 'school room,' as more emphasis is placed on drawing users into the library to use rare and unique materials. This bibliography assembles and evaluates special collections resources and highlights trends, standards, and accepted best practices within the field, specifically with regard to issues that have emerged from this newfound approach to special collections public services.

To present a current view of special collections, the bibliography is limited to resources published between 2000 and 2010. Peer-reviewed articles, monographs, and official organizational guidelines (ALA, ACRL, RBMS) are included. Resources selected for annotation are arranged in four categories representing facets of special collections work: access, instruction, outreach/collection use, and professional development.

Headings:

Public relations of libraries

Special collections -- Aims and objectives

Special collections -- Bibliography
CLOSED STACKS, OPEN DOORS: AN ANNOTATED BIBLIOGRAPHY OF PUBLIC SERVICES WITHIN SPECIAL COLLECTIONS

by
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Introduction

Academic special collections are typically classified as rare, unique, primary documents – usually historical in nature – that require special care, handling, supervision, and security measures regarding access and use. Though special collections share many common traits with general “browsable” library collections (need for access and description, significance within research and scholarship), materials within these collections are usually fragile, expensive, and rare, and are therefore subject to special restrictions and guidelines.

Despite the fact that special collections materials are by and large protected by closed stacks (i.e., not immediately accessible to patrons), they still play a vital role in the academic landscape, and as such, public services providing patrons with access to these materials must be carefully considered.

In 2000, the now-seminal special collections journal *Rare Books and Manuscripts* (*RBM*) began its inaugural issue with an essay by librarian and rare book curator Daniel Traister, entitled “Is there a future for special collections? And should there be?” (Traister, 2000) Traister’s essay challenged the very nature of special collections and openly chastised the profession for remaining stubborn and immovable during a time when information access was rapidly changing. At one point in the piece, Traister spoke of his fear for the continuation of the special collections profession, stating,
Special collections will survive. Too much has been invested in them for them not to survive. But unless we who staff them demonstrate an imaginative willingness to come to grips with this fundamental drive toward increasing openness, I, for one, will anticipate not their thriving future but, rather, their increasing marginalization in the teaching and research processes they claim to support (76).

Interestingly, the same issue of *RBM* featured an article by Billings entitled, “Still special after all these years: the importance of special collections in an academic library” (Billings, 2000). Billings argued that special collections were just that – wholly unique materials purposefully set apart from other university/repository collections. His view of special collections professionals and their ability to perform in the wake of change appeared far less bleak than Traister’s outlook, as he seemed confident in the ability of special collections professionals to rise and meet the challenges presented by technology, open access, and an increasingly digital world:

Special collections will be shared more readily via digital delivery, on-site surrogates, and combinations of media yet to be created. The special expertise of library staff will be shared more broadly, probably online. Competition among libraries, uncurbed by rampant cooperation, will continue as keenly as it always has. After the waves of change, dearth, and conflict; after all this new technology and technology to come--special collections will remain as special in the future--as they always have, after all these years (51).

Considering the completely divergent views of the future of special collections presented in these articles (by special collections professionals, nonetheless), it’s no wonder that special collections have long been viewed as confusing, uninviting, and unwelcoming to all but the serious scholar. Couple this misconception with stringent rules and reading room regulations regarding access, security, and personal belongings, and it comes as no surprise that certain user populations (namely, undergraduate students) are often too intimidated to utilize special collections materials. Johnson (2006) and
Smith (2006) speak about this very idea and the often irrevocable effects that poorly executed and/or non-existent public services can have on undergraduate students and their impressions of special collections.

Clearly, in the wake of new technologies, increasing demand for digital access to materials, and electronic requests for information, special collections professionals can no longer afford to sit idly by and wait for users to discover special collections resources and services on their own. Technology, digitization, and openness must be watchwords for the special collections of the 21st century and the individuals who staff them if special collections are to remain relevant in the ongoing scholarly conversation. As such, special collections public services must be revisited, reconsidered, and in some cases, reorganized if special collections are to be made pertinent and available to user populations.

Some special collections professionals, however, may balk at the heightened demand for digital access to materials or the increase in electronic reference requests; after all, these remote outreach services can be expensive, time-consuming, and carry potential legal and social issues along with them. Nevertheless, changes in information retrieval and access call for special collections to adapt to the current library landscape, which is increasingly digital in nature.

Of course, this does not mean that special collections librarianship should turn everything into digital surrogates; rather, as Whittaker and Thomas (2009) argue, special collections should consider “… judicious, targeted use of selected tools [as] a reasonable way of enhancing our collections and engaging new users” (xv). Adopting new strategies for improving special collections public services should not be too hard for special
collections librarians and staff, because essentially, research has always been a somewhat social activity: “Research using primary historical sources was never really as solitary as we like to think; social networking happened through friends of friends, colleagues, dissertation directors, letters, telephone calls, and e-mail long before interactive social networking sites were launched. These interactions have just changed venue” (xvii).

In keeping with this notion, Torre (2008) argues that special collections are meant to be used, not hidden away, and therefore should be utilized and enjoyed as much as possible. To this end, a careful consideration of special collections public services seems integral in achieving enhanced access to rare and unique materials.

As evidenced by the current literature included within this bibliography, a number of common issues are seen when considering how to provide better public services within special collections libraries. Bradshaw and Wagner (2000), Lundy (2004), and Reynolds and Sauter (2008) all advocate for increased collaboration of staff when attempting to enhance public services. Schmiesing and Hollis (2002) argue for the collaboration of college and university faculty and special collections librarians, as instructional collaboration allows for richer classroom experiences, which in turn, makes previously daunting special collections seem accessible and inviting to undergraduate users.

Others argue that digitization and electronic access to materials are key to improving public services in special collections. Davison (2009) comments that users can glean new information and insight into cultural history by studying digital surrogates of special collections materials. Prochaska (2009) also supports using digital materials within an education setting, not only because of the preservation offered by digitization, but because convenient access spawns an increase in the use of primary resources for
teaching and independent undergraduate research. In this way, digitization – although largely used as a tool for enhancing remote access to collections – can be seen as an method of increasing interest in special collections materials. As such, users might be more inclined to visit the library in person to interact with special collections items.

Interestingly, only a few current resources seem to argue that good, old-fashioned outreach, such as exhibits and/or public programming, is the most important aspect of special collections public services. (Although to be fair, many articles in this bibliography do comment that they consider reference services, instructional sessions, and improved access as outreach initiatives.) Hammerman (2006) calls for outreach efforts aimed directly at students – ideally, libraries should create some sort of programming that appeals to the undergraduate population while highlighting the varied holdings of a special collections repository. Stam (2006) argues that outreach is the only way to keep special collections engaging and relevant, while also promoting what the library has to offer in the way of materials, instructional space, and staff knowledge.

Special collections librarianship is another notable aspect of the current discussion regarding special collections public services. Landis (2006) comments that special collections administrators should take great pains to determine the ideal special collections professional of the future, while Cloonan and Berger (2003) hold that the best special collections professionals are those who experiment and take risks. Interestingly, most authors seem to disagree on the notion of the “ideal” special collections librarian; some argue that special collections librarianship is presently suffering because of a lack of formal education, while others argue that the unique nature of special collections work means that a formed education route cannot be established.
Despite these wide-ranging views regarding special collections access, instruction, outreach, professional development, and research, one thing does remain clear: special collections professionals’ are strongly committed to improving user services and making special collections more open and inviting.

**Methodology**

**Search Strategies**

Resources included in the bibliography were culled through a variety of methods. The first round of resource collection began by searching the University of North Carolina at Chapel Hill’s online catalog for keywords: “special collection*,” “special librар*,” “archives,” “rare books,” and “rare books and manuscripts.” This produced only a couple of relevant monograph results. A Library of Congress Subject Heading search was then conducted using variations of the phrase “special collections;” subject headings such as “libraries --special collections,” “libraries -- special collections -- manuscripts,” “special libraries -- administration,” “special collections -- access,” “special collections -- public services,” and “libraries -- public relations” produced a greater number of resources related to the topic at hand.

Based on the small number of appropriate monograph results, it became clear that most applicable resources were likely to come from online databases and/or electronic scholarly journals. To locate these resources, keyword searches for “special collections,” “rare books,” and “archives” were conducted within two databases: Library and Information Science Abstracts (LISA) and Library Literature & Information Science Full Text. This searching method produced a number of relevant journal articles.
Additionally, upon noting the same journal citations popping up over and over again in the electronic databases, individual searches for relevant subject headings and keywords were conducted in those particular journals, namely: *American Archivist, Rare Books & Manuscripts (RBM), College & Research Libraries*, and *the Journal of Academic Librarianship*. Most of the articles included in the bibliography come from one of these peer-review journals.

**Resource Selection**

A long list of potential resources for annotation was amassed after thoroughly searching the library catalog, electronic databases, and online journals. Recognizing that the initial list of retrieved sources was lengthy as a result of the general nature of the search queries, a set of weeding guidelines was established in order to focus the list of resources on public service-related works. As such, the resources included in the bibliography were selected according to three specific guidelines:

- The article or monograph must have been published between 2000 and 2010.
- The article or monograph must also be in keeping with the theme of the bibliography: public services in special collections.
- The article must have been published in a reputable, peer-review journal.

Monographs and journal articles in the bibliography were ultimately selected for annotation using the guidelines listed above. The resources are divided according to themes that emerged from the survey of the literature – access, instruction, outreach/collection use, and professional development – with each resource corresponding to one these facets of special collections public services. These themes are defined according to the following descriptions:
Access: the ability to locate relevant information through the use of catalogs, indexes, finding aids, or other tools; the permission to locate and retrieve information for use (consultation or reference) within legally established restrictions of privacy, confidentiality, and security clearance (SAA, 2005).

Instruction: activities involved in teaching users how to make the best possible use of library resources, services, and facilities, including formal and informal instruction delivered by a librarian or other staff member one-on-one or in a group. Also includes online tutorials, audiovisual materials, and printed guides and pathfinders (Reitz, 2010).

Outreach/Collection use: the process of identifying and providing services to constituencies with needs relevant to the repository's mission, especially underserved groups, and tailoring services to meet those needs; outreach activities may include exhibits of collections, workshops, publications, and educational programs. Collection use also includes scholarly interactions with materials, use of materials for research purposes, and reference services (SAA glossary, 2005).

Professional Development: development and maintenance of key knowledge regarding current professional issues, theories, and best practices within a selected field (RBMS competencies, 2008).

The lists in each section are formatted alphabetically according to the author’s last name. Connections to other authors, resources, and/or topics (if applicable) are indicated within selected annotations.
Annotated Bibliography

**Access:** the ability to locate relevant information through the use of catalogs, indexes, finding aids, or other tools; the permission to locate and retrieve information for use (consultation or reference) within legally established restrictions of privacy, confidentiality, and security clearance (SAA glossary, 2005).


Officially adopted in July 2009, this statement by the Association of College and Research Libraries (ACRL) and the Society of American Archivists (SAA) briefly sets forth a number of professional standards regarding access to archival materials. Essentially, ACRL and SAA argue for “equal terms of access” for all patrons, noting that a repository (archive, special collections library, museum, etc.) “… should not deny any researcher access to materials, nor grant privileged or exclusive use of materials to any researcher, nor conceal the existence of any body of materials from any researcher, unless required to do so by law, institutional access policy, or donor or purchase stipulation” (590). According to the varying standards described throughout the document, adherence to the overarching standard of “equal terms of access” can best be achieved by paying attention to seven important access issues – responsibility, intellectual accessibility, restrictions, policies, fees and services, citations, and copyright.

ACRL and SAA assert that each repository must make its respective research materials available to its patrons with complete transparency – materials should never be completely hidden from the public or restricted in an unethical way. Restrictions are a given in almost every archive or special repository; even though the ultimate goal is to provide as high a level of access as possible, “… a repository must fulfill legal and institutional obligations to protect confidentiality and physical security of its collections” (590). Therefore, restrictions must be clearly documented, must be reasonable, and must be periodically reviewed and/or removed over time. Some form of documentation regarding the repository’s individual access policies must exist; researchers must also be given access to these policies, which should be made available in both physical and electronic formats. Access to materials should be provided at “no direct cost to the researcher,” but if reproductions are to be supplied, the cost should be as minimal and as reasonable as possible. Lastly, legal issues of attribution and copyright should be considered: repositories must be forthcoming about the preferred methods of citation for their holdings and should be prepared to field questions about copyright. In short, all of
these standards must be upheld in order for archives and special collections libraries to serve patrons as fairly and as equally as possible.


When considering possible instances of collaboration between special collections staff members, one probably wouldn’t immediately think of an alliance between curator and cataloger. As Bradshaw and Wagner note in the introduction to their 2000 article, special collections curators and catalogers each possess valuable knowledge unique to their positions, and therefore, can assist each other significantly through a mutually beneficial collaboration. The authors comment, “The curator benefits from rare book cataloging by gaining better intellectual control over the collections' holdings, thereby promoting more effective reference, collection development, and outreach … In turn, the cataloger benefits from knowledge of the collections' strengths and overall mission. This knowledge, combined with an idea of the research needs of the collections' patrons, enables the cataloger to customize certain elements of the cataloging record to better serve the needs of the collections and their users” (525).

Though the authors suggest that curator and cataloger come together and collaborate for the good of the collections, this can often be easier said than done. Staffing issues sometimes make this alliance impossible. Additionally, tensions may already exist in some special collections libraries if departmental lines are drawn; the authors mention this fact, stating, “When special collections are part of public services and cataloging is part of technical services (a common library administrative structure), opportunities for collaboration are hindered” (529). As such, why would catalogers and curators ever think to collaborate?

The authors make an interesting case regarding the need for constant communication between curators and catalogers, explaining that this alliance is necessary for something they term “customized cataloging.” Customized cataloging, they explain, essentially refers to “using a combination of subject knowledge and cataloging acumen to customize the catalog to provide an optimal match between the records in the catalog and the items in the collections” (531). Conducting this type of cataloging not only allows for the creation of more accurate item records, but also provides much better access to materials for patrons and outside users. In order to do so, however, “[curators] need to articulate cataloging priorities” (531), which is something, the authors note, that can come from a successful collaboration with special collections catalogers. In essence, the authors convincingly advocate for better communication between two disparate sides of the special collections profession so that patrons can enjoy fuller access to special collections materials.
Published by the Association of Research Libraries (ARL) in 2004, this document essentially serves as a three-part discussion regarding the various security and restricted access procedures implemented by ARL special collections libraries. Survey responses, copies of special collections libraries’ call slips and reader registration forms, and ARL policies and procedures are included to provide specific examples of security measures used in ARL special collections repositories.

The first – and perhaps most telling – section of the document chronicles responses to a 2004 security survey distributed to 123 ARL member libraries. According to the introduction, “The survey asked what patron registration information is collected, what limits are placed on the number of items used, how the reading room is monitored, and how returned items are checked before reshelving” (11). The survey also asked about libraries’ experiences with theft and destruction of items. Of the 123 libraries surveyed, 68 responded, with some surprising results.

Many of the survey responses were close to what one would expect: for instance, in regards to patron registration, only two of the 68 libraries (3%) do not require patrons to fill out registration forms, while the other 66 do require registration. Only 14 ARL libraries (21%) do not require patrons to show ID cards when using materials, while 55 (89%) of the libraries surveyed copy and keep a record of the ID when presented. Rules regarding bringing personal belongings into the reading room also seem to be pretty standard: “Most special collections (56 or 85%) require patrons to leave coats, bags, and other personal belongings outside the reading room” (12). Essentially, it appears that most ARL special collections libraries seem to agree on these fairly common security procedures.

However, many of the responding libraries seemed to disagree in terms of their practices regarding reading room security. Despite the fact that 65 of the 68 libraries surveyed (97%) responded that their library staff does “keep an eye on the reading room” (14), a fair amount of respondents admitted that their staff members sometimes leave the reading room unattended: “Responses to a question on whether staff ever leave the reading room unattended seems, at first, to contradict the responses on how patrons are monitored. Only 48 respondents (73%) report that staff never leave the reading room unattended; in 18 cases (27%), staff sometimes do leave patrons alone. 8 attribute this to staffing shortages. In most cases, this is rare; in others, it is chronic” (14). Perhaps not surprisingly, then, 49 of the responding libraries (72%) reported that some type of theft of special collections materials have taken place.

These numbers present an interesting question: how far should the ARL go towards creating a set of security standards required for all libraries? As evidenced by the survey results, level of adherence to security measures often depends on building resources (available space, size of reading room, etc.) and staffing, which can’t truly be regulated. Some might consider the RBMS security guidelines highlighted directly below as a step
in the right direction, yet these guidelines are just that: suggestions for best practices. Perhaps academic special collections libraries could benefit from more standardization of security procedures; to this end, the responses to the ARL survey could be used as evidence for the future implementation of standardized security procedures in special collections libraries.


Authored by the RBMS Security Committee, this piece provides a number of suggested principles for maintaining the integrity and safety of special collections materials. Eight essential areas of security are outlined within the document: the library security officer (LSO), the security policy, the special collections building or area, the staff, the researchers, the collections, transfers from the general collection, and legal and procedural responsibilities. Suggestions for the successful implementation of each of these areas are included at the end of each section so that staff members might determine which particular areas of the guidelines mentioned might apply to their particular institution.

Essentially, these guidelines strongly assert that the security of rare books, manuscripts, archival documents, and other special collections materials is dependent on a joint effort on the part of all staff members. Every staff member, student worker, and volunteer has their role to play in keeping materials safe and secure: library administrators are responsible for making the necessary arrangements for hiring an LSO and/or outside security consultants; collection curators are responsible for maintaining a thorough, up-to-date knowledge of the materials in each collection; research and instruction staff are responsible for monitoring the reading room and any visiting researchers wishing to consult materials; technical services staff members are responsible for creating, maintaining, and updating detailed records of materials; and preservation staff members are responsible for consulting with staff regarding book marking and physical security of collections.

By keeping abreast of these general guidelines and more detailed institution-specific principles, special collections professionals can ensure the security of their collections and their repository buildings. Again, cooperation is key, not only in order to properly protect special collections materials, but in order to provide adequate user service: “The effort of the entire staff, with final responsibility vested in one senior staff member, working in cooperation with law enforcement, will result in more secure collections wherein materials are preserved and made available for all who wish to use them” (430).


The issue of how best to address backlogged special collections materials has been a prominent one within the literature of the last ten years. Lundy and Hollis (2004), Patty
(2008), Tabb (2004), and Whittaker (2008) all present arguments on various aspects of the issue of backlogs and generally suggest that special measures have to be taken to provide sufficient access to hidden collection materials. This 2004 article by Jones also discusses the nature of backlogs within special collections libraries and addresses the importance of exposing hidden special collections.

In the introduction, Jones comments that unprocessed/underprocessed collections have been a serious problem in special collections libraries for years, which is an unfortunate occurrence for a number of reasons. Jones notes, “Uncataloged or underprocessed collections are at a greater risk of being lost or stolen and are difficult, if not impossible, to recover from legal authorities if they are underdocumented. Unique and rare materials are particularly vulnerable … They are inaccessible to the scholarly community and thus hinder research and research results” (89). Additionally, due to restricted methods of access to materials, it is totally unlikely that patrons would ever stumble upon unprocessed materials: “Unprocessed collections are totally inaccessible because they are likely to be in closed stacks, eliminating the possibility of discovery by browsing” (89). Considering the effects of unprocessed collections on special collections security, research, donor relations, and so on, it is clear that something needs to be done.

According to the author, any little bit of progress in providing better access to hidden collections is helpful. She comments, “Though this issue needs further discussion, most believe that it is better to provide some level of access to all materials than to provide comprehensive access to some materials and no access at all to others” (91). Jones goes on to argue that first and foremost, libraries should approach the term “access” in the broadest sense, as access to materials can occur through varied means, not just through online public access catalogues or electronic finding aids. Though these are two important methods of providing access to special collections materials, they are not the only means: catalogs, webpages, specialized biographies, exhibits, public readings, talks, panel discussions, digitized collections, and subject guides can all help in providing access to unprocessed collections (95). Overall, it seems the key is for special collections libraries to alert the public – scholars, faculty members, casual researchers, etc. – about library holdings, processed or not.

As Jones concludes, “The cost to scholarship and society of having so much of our cultural record sitting on shelves, inaccessible to the public, represents an urgent need of the highest order to be addressed by ARL and other libraries” (105). Clearly, this is an important issue that needs to be addressed as soon as possible.


Lundy and Hollis’ article provides a solid example of the importance of collaboration within the special collections world. Using a form of management based completely on cooperation, trust, and group effort, catalogers at the University of Colorado at Boulder
(UCB) were able to successfully catalog and provide records for thousands of backlogged special collections items; this paper chronicles the experience.

Since the late 1990s, the authors explain, catalogers, administrators, and librarians alike had been particularly concerned with determining how to enhance public services and access to UCB’s special collections. As with most special collections repositories, many of UCB’s recent gifts and acquisitions remained stagnant in the backlog—in many cases, unaccounted for and essentially hidden from the public. The backlog kept growing with every subsequent acquisition, making it nearly impossible to for full-time staff to manage. In the early 2000s, however, UCB’s special collections catalogers finally got their chance to tackle the backlog, marking perhaps the first time that budget cuts have ever proved fortuitous: “By 2002, a decrease in new acquisitions due to budget constraints created an opportunity. With the decrease in acquisitions for the general collections the demand on the copy catalogers’ time was reduced, enabling participation in projects that the cataloging department had not yet had time to address” (471).

Catalogers chose to address the Mountaineering Collection, a large series of materials that had grown progressively since 1977, but had never been fully processed. The authors explain the size, scope, and significance of this particular collection and their choice to use it for their pilot management project: “[C]onsisting of approximately 4,000 monographic volumes and about 3,600 serial pieces, [the Mountaineering Collection] is a regionally important collection for the University of Colorado at Boulder. Since 1977, books have been donated and purchased on the topic of mountaineering worldwide, but with the exception of about 300 titles, none had been cataloged in the online environment” (472).

To combat this difficult cataloging task, the authors comment, special collections staff utilized a participatory management style; essentially, staff members from all departments contributed to the project, regardless of their position description or professional background. This meant that conflict resolution, daily management duties, and supervisory roles were all handled by each member of the team; no one member outranked any other. Lundy and Hollis comment, “Engaging the participation and collaboration of veteran paraprofessionals and non-administrative professionals to collaborate across public and technical services division lines was the key element in this process” (470). Public and technical services staff members worked equally on this particular project, and their ultimate success came from staff collaboration and integration.

Lundy and Hollis go on to note that use of the Mountaineering Collection has significantly improved, certainly due in no small part to the participatory management style used during the project. They comment, “Use of the Mountaineering Collection has increased. Patrons are requesting more books because more cataloging records are online. Instead of coming to the reading room in hope of finding something useful in the card catalog, patrons are coming with call numbers in hand for the books they need” (473). Here, it can be seen that participatory management is a worthwhile strategy to employ when striving provide users with enhanced access to materials. Lundy and Hollis’ article
provides special collections professionals with an excellent example of how this type of management and organization can truly succeed.


In this 2004 article, Russell chronicles the results of a survey conducted among ARL member libraries in 2003 regarding the state of special collections cataloging. She explains, “In this project, the process of cataloging special collections among ARL member libraries was examined, underscoring the changing nature of cataloging and the emerging significance of special collections in research libraries. This survey examines the organizational structure of special collections cataloging, as well as the number and type of staff devoted to the endeavor” (296). Of the 114 libraries surveyed, 78 responded with some interesting results.

After analyzing the survey responses, Russell discovered that the varying structures of special collections libraries’ cataloging departments were particularly noteworthy. Her findings showed that a little over 44% (34 respondents) “reported that staff responsible for cataloging special collections material … report to a cataloging department or equivalent unit” (296). 23% (18 respondents) reported responding directly to special collections’ administrative units, while 14% (11 respondents) operate as a special collections team or subunit within a larger cataloging unit. Perhaps most interesting, though, is the structure of the remaining 22%, who reported “some other type of arrangement” (297). Russell notes that, upon further investigation, these “other” types of cataloging department configurations proved to have been formed out of necessity, either because of insufficient staffing or financial restraints: “One institution has a distinct department within technical services wholly devoted to special collections. Several institutions reported split types of staffing. For example, one institution reported that some staff within special collections work on cataloging along with other job duties (estimated at less than 30 percent of their time), while staff within the cataloging department also are assigned special collections cataloging work” (297).

Based on these numbers, it seems that a number of special collections repositories have had to come up with creative solutions in order to maintain their cataloging efforts. Couple this finding Russell’s discovery that “over 45% (35 respondents) reported less than one full-time employee [assigned to special collections cataloging]” (298), and it is clear that special collections cataloging truly is an area that needs special attention. Just as Lundy and Hollis (2004), Patty (2008), and Whittaker (2008) argue, sufficient staffing choices must be made in order to ensure adequate cataloging of materials; otherwise, special collections materials could end up stagnating in a backlog, which could cause a whole new set of issues for special collections repositories, particularly in terms of access. As Russell comments in closing, “Facing the crossroads of special collections cataloging created by technology and organizational trends, library administrators must consider all their options before making choices about allocating resources” (303).

“The digitization of special collections has always been a complicated picture,” Prochaska’s article begins. “Complicated by problems of scarce resources, and expectations that continually out run the available technology and expertise. Complicated by politics, legal issues, and organizational boundaries. Complicated very often by the ways in which cultural and historical ownership interacts with the responsibilities and values involved in stewardship of the original materials in our care” (13). In many ways, Prochaska’s assertions are correct; special collections repositories have long struggled with the seemingly endless financial, legal, social, and political issues surrounding mass digitization and supplying electronic access to rare, unique materials. In light of these possible complications, then, why digitize special collections at all? What possible benefits could come from digital special collections?

Though she acknowledges the headaches sometimes involved with digitizing special collections materials, Prochaska seems to be in favor of providing electronic access to analog materials. In regards to educational benefits, she comments, “One of the strongest arguments for higher education to establish a robust, sustainable infrastructure for digital special collections (whether within single institutions or through consortial agreements) is the enormous increase in the use of primary resources for teaching and independent undergraduate research, which creates an inexhaustible appetite for digital versions of materials, either to supplement the original or to protect it from overuse” (19). In Prochaska’s view, digital special collections – which are almost always made up of primary sources – can be used to complement secondary sources, thereby supplying students with a richer, more complete understanding of historical events.

Prochaska’s quote regarding the potential advantages of digital special collections certainly rings true [see Davison (2009), p. 23, for discussion of the effects digital special collections on teaching and research]; it’s hard to imagine anyone challenging the notion that providing better access to materials would ultimately benefit students and teachers alike. However, one phrase stands out amongst the others in the quoted lines: “inexhaustible appetite for digital versions of materials.” This phrase seems to serve as a sort of warning, a heads-up against some of the potential problems posed by mass digitization and/or electronic publishing of special collections materials. Prochaska asserts, “Digital special collections need to be packaged. They carry with them a danger of misinterpretation that cannot be mitigated on the Web through personal intervention as it might in a reading room or classroom. The huge opportunities that digitization presents to extend the accessibility and benefits of special collections undoubtedly carry with them potential drawbacks in the form of increased claims to the ownership of content, and a growing number of contested interpretations” (20).

Essentially, Prochaska calls for quality control within digitized special collections, and rightfully so: while it can certainly seem tempting to digitize any and every bit of special collections material, it is better for special collections administrators and librarians to remain savvy and discerning in terms of what they choose to digitize and publish to the web. After all, as Prochaska argues, which is better – digitizing a great mass of materials
with questionable quality or providing well-chosen, purposeful collections of high quality? To this end, this particular piece serves as a kind of wake-up call for special collections professionals, alerting them to the benefits and risks of mass digitization of collection materials.


Southwell’s article recommends a way to fill the gap among special collections libraries’ patron registration policies, an interesting discrepancy first noted in Center and Lancaster’s 2004 survey of ARL special collections libraries’ security policies [see Center and Lancaster (2004), p.10]. Center and Lancaster’s survey results showed that the 68 responding special collections libraries had vastly different requirements in terms of collecting information from patron registration forms: while 97% of libraries did require patron registration, each library required varying information. In short, no standard practices were found in this area of special collections library security.

To fill this gap, Southwell suggests a standardization of patron registration records. She asserts that the act of requiring all special collections libraries (regardless of collection size, number of patrons, type of institution, etc.) to gather the same patron information would ultimately serve each individual library and the special collections profession as a whole. Southwell argues, “The adoption of a standard form for patron registration at special collections would benefit libraries in two ways. First, collections security will be enhanced if all special collections acquire and retain common categories of information on the identity of their researchers. This is particularly true of libraries that currently do not require registration, and those who do not currently link the titles of items used by patrons to their registration records. Second, libraries will benefit from collecting and analyzing information about their patrons with a view toward improving researchers’ experiences in special collections” (78).

Southwell states that each registration form should ask for 11 pieces of information, all of which would ultimately be used to collect data about use of collections and patron demographics. Forms should request the following: patron name, date of visit, physical address, telephone number/email address, identification (usually photocopied onto the completed form), academic/institutional affiliation, contact method, research topic, research purpose, and collections used; this should all be authorized by the patron’s signature at the bottom of the form. Each part of the form is vital not only to the library’s security, but to the overall library environment: in the author’s words, “Registration is crucial to the security of special collections materials … Gathering comprehensive, standardized information about all readers clearly demonstrates the library profession’s commitment to security of collections, and the constant implementation of best practices in all special collections libraries” (90).

On the whole, Southwell makes a sound argument for the standardization of patron registration forms. Security within special collections is an extremely important topic, and her ideas could help to guard against possible theft, vandalism, or mutilation of
special collections materials. Furthermore, the implementation of the idea is as easy as creating a new form in a word processing document, which is an inexpensive, easily executed alternative to many costly security measures.


Comparable to Center and Lancaster’s 2004 document, this book compiled by Sudduth, Newins, and Sudduth is divided into several sections: a bibliography of selected special collections resources, results of a 2003 survey, and examples of different policies and forms used by various academic special collections libraries across the country. However, while Center and Lancaster’s document focuses solely on security within special collections, Sudduth, et. al. present a broad overview of academic special collections libraries. As they comment, the purpose of the work is “to provide a snapshot of the state of special collections in college and small university libraries which will be useful to special collections librarians and administrators” (1).

The special collections library survey described in the book was created and distributed by the authors in February 2003. 260 libraries were contacted and 146 responded, with some sending copies of policies, forms, and other documents used by their respective repository. Essentially, the survey includes the usual library assessment fare: questions about staffing, acquisitions, cataloging, processing, and conservation, etc. The most interesting part of the survey, however, deals with one of the newer challenges presented to today’s special collections libraries: new technologies and their effects on access to special collections. According to the authors, 75% of the respondents reported having written library policies on topics such as access, gifts, image reproductions, collection development, and donations; only 50% of libraries had these same policies available on the internet. Special collections libraries also seem to run the gamut in terms of finding aid access. The authors note, “Only 21% of the responding libraries reported that at least one quarter of their finding aids for their manuscript and archival collections were on the web. 56% of the libraries reported that none of their finding aids were accessible via the web” (7).

The survey also addresses special collections libraries digitization efforts. As the authors note, survey responses showed that a mere 39% of the responding libraries had digitized some of their special collections materials and made them available in an online format. Of those respondents who had digitized at least part of their collections, 79% stated that their digitization was completed in-house, while the remaining 21% outsourced all digitization efforts. Only 26% of libraries had considered utilizing digitization as a method of preservation.

Certainly, the percentage of libraries offering online access to policies, finding aids, and collection materials has probably changed since 2003, but it is worth noting the steady progression of new technologies within special collections libraries. In 2003, over half of the libraries surveyed in this report had none of their finding aids online, while less than 40% had not digitized any of their collection materials; today, these numbers are virtually
unheard of. For a profession that has always seemed to question the use of technology in achieving goals, special collections really have made great strides in employing electronic resources to enhance access to special collections materials. As Sudduth, et. al. explain through the analysis of their survey responses, “The availability of introductory material, access to the online catalog, and finding aids via the web all enable users to plan their visits. While these libraries are faced with the challenges of balancing the need for access and preservation against the costs of staffing, cataloging, and processing, … many smaller college libraries are meeting these challenges through the use of new technologies” (8). [See Turcotte and Nemmers (2006), p. 44 and Prochaska (2009), p. 17 for more discussion regarding technology and its potential impact on special collections.]


In 2003, the Association of Research Libraries (ARL) held a conference entitled “Exposing Hidden Collections,” which aimed to address the problems caused by unidentified, unused materials within library special collections. Tabb calls this aspect of special collections a “dirty little secret,” explaining: “… our libraries collectively hold millions of items that have never been adequately described and therefore are all but unknown to, and unused by, the scholars it is our mission to serve” (123).

On the surface it seems that mass digitization would be the logical solution to this overwhelming problem; Tabb even mentions that a number ARL libraries have already embraced the potential role that technology can play in making library collections more readily accessible to a broader audience (123). However, sheer desire to publicize underused collections through digitization does not mean that it is a completely feasible project, particularly in terms of financial resources and available manpower. Furthermore, according to the results of a comprehensive backlog survey distributed among ARL member institutions, ninety-nine libraries reported a total of 466 backlogged collections in need of digitization; clearly, as the ARL realized, mass digitization of all backlogged collections would not an option, especially given the budgetary constraints faced by nearly all ARL member libraries.

Additionally, the Special Collections Task Force charged with examining this issue determined that small-scale, local action by each individual repository might seem like a sound course of action – essentially, every man for himself. However, this option was eventually dismissed in favor of a more concentrated effort, as there appeared a “strong consensus that a national, organized effort to address the processing backlogs in library special collections could help individual institutions make progress” (124). After the results of the aforementioned backlog survey were analyzed, it became clear that many ARL member libraries did, in fact, report many of the same priorities in their digitization efforts, further cementing the task force’s assertion that a concentrated effort might be the best course of action.

Essentially, Tabb’s piece echoes some of the same general sentiments regarding backlogs found in Lundy and Jones, namely the importance of attacking backlogs head on with the
use of creative organization, no matter how daunting it may seem. Given the unique nature of special collections and the effort usually involved in cataloging and description, considerable time and manpower are often necessary to fully process backlogged materials. However, if a number of repositories band together to request funding and support, there’s no telling how quickly libraries could expose their hidden collections.


In today’s academic library, Integrated Library Systems (ILS) are typically used to track non-secure library materials, maintain patron records, and provide circulation statistics. ILS modules are also used to create electronic cataloging records and provide online in-progress records for backlogged materials, allowing users to locate materials no matter what their position in the cataloging queue.

While most academic libraries rely on an ILS to track their general collections, special collections have historically resisted the implementation of ILSs, largely because their materials do not circulate within the university population. In lieu of an electronic library management system, special collections repositories have employed hard copy documentation of usage in the form of reader registration documents and paper call slips. In today’s increasingly electronic society, Whittaker argues, this dual system of circulation tracking can prove problematic for large library systems: “Since rare books, archives, and other materials are often held by collections that are part of a larger library system, this means in practice that an institution often has two systems: a sophisticated and expensive ILS for general collections and an idiosyncratic, yet effective, local system for special collections” (29). However, Whittaker asserts, if special collections libraries are willing to experiment with electronic ILSs by slowly phasing circulation modules into daily services, staff members might be able to “eliminate redundant record keeping and reduce errors” in addition to achieving “greater staff efficiency, increased availability of user statistics, and an overall greater understanding of collection use patterns” (29).

According to the article “circulation” in terms of special collections materials refers to “using the ILS to electronically track usage of materials within a secure reading room” (29), which seems to be a definition unique to the special collections library. As Head of Special Collections Cataloging at the Ohio State University (OSU), Whittaker speaks from experience when she argues for the implementation of circulation systems for special collections libraries. As a large research university, OSU’s special collections are equally vast: “Special collections … consist of ten individual collections, each with a distinct subject foci, located in several physical spaces” (31). When OSU’s special collections cataloging staff decided to experiment with the implementation of III Millennium’s circulation module, they understandably realized that the project would need to be completed on a small scale, simply because of the sizeable amount of bibliographic information involved. Whittaker comments, “With both cataloged and uncataloged materials in the picture, and the need to accommodate both local (OSU) and visiting users, we decided to implement the project in phases” (31). Certainly, an
experiment such as this begs to be carried out over and extended period of time in order to ensure adequate documentation and analysis of results.

Over the course of the article, Whittaker explains that both phases of the ILS implementation project proved overwhelmingly successful, and provided staff with a better understanding of how special collections materials are used by patrons. Surprisingly, “Circulation data showed a very high level of collection use by undergraduates and honors undergraduates” (33); in addition, implementation of an ILS system allowed for increased cataloging of backlogged materials. Whittaker notes that “Manuscript collections in particular are being cataloged as they are used, with item records being created that more accurately reflect the extent of the collection” (33). As per Whittaker’s observations, it can be said that using an ILS in a special collections library can essentially allow for a transformation of circulation services.

Using an electronic circulation system in this responsive way seems ultimately beneficial to a special collections library; with backlogs growing larger and larger everyday, it can be difficult to determine cataloging priorities. According to Whittaker’s article, electronic circulation systems, however, can give special collections staff a new perspective on how materials are used and can allow staff to become more aware of their users’ needs.
Instruction: activities involved in teaching users how to make the best possible use of library resources, services, and facilities, including formal and informal instruction delivered by a librarian or other staff member one-on-one or in a group. Also includes online tutorials, audiovisual materials, and printed guides and pathfinders (Reitz, 2010).


In this piece, Alvarez – currently the Outreach Librarian and Special Collections Curator at the University of Michigan – discusses the importance of incorporating rare books in the undergraduate curriculum and provides specific examples of instances where he has utilized rare books in the library classroom. Over the course of his varied experience as a rare book librarian, Alvarez has found that “primary sources are often neglected in many undergraduate courses,” particularly in those courses which focus on cultural history or literary theory (95); according to the author, this lack of use is problematic, as students can learn a great deal by using rare materials to consider the book as an historic object.

In the interest of illustrating to undergraduate students the rich, vibrant research that might be possible through the use of rare books and materials, Alvarez comments that he depends upon “class presentations both as a way to inspire undergraduates in their research endeavors and as an introduction to some of the methodological premises contained in the discipline of the History of the Book” (95). The article highlights three particular presentations in which Alvarez displayed rare versions of famous works by Dante, Copernicus, and Cervantes during presentations to undergraduate students. These works were used not only to get undergraduate students to think about the importance of the themes and issues within the works, but also that they might consider how the book itself can be read as an artifact. Alvarez argues that the “physicality of the book, manuscript, or printed material can provide students with new perspectives,” and can perhaps inspire students to consider the history of the thing itself, not just the pages between the covers.

To achieve this feat, Alvarez states that collaboration between the rare book librarian and the faculty member is key and cannot be discounted when attempting to convey to undergraduates the power of primary documents. Thought-provoking, course-relevant library presentations crafted through collaboration between faculty member and librarian can have a profound effect on the undergraduate curriculum, “since undergraduates are provided with a unique opportunity to appreciate the research value of the rare book collection” (103).


This brief article takes the form of a discussion between Trevor Bond and Todd Butler, colleagues from Washington State University. Bond, a special collections librarian, and Butler, an English professor, teamed up in Fall 2007 to teach a collaborative weekly
seminar that focused on rare materials and ephemera from WSU’s special collections. The course, (“English 492: From Manuscript to E-Book”) was meant to focus on the history of the book and the vast changes in print culture over the centuries, a topic that certainly could have been tackled in typical seminar fashion—through readings, discussions, and essays. However, Bond and Butler envisioned something different for their seminar students and wanted them to take something else away from their classroom experience. As Bond explains, “... [we] wanted them to have a hands-on experience unlike any of their other courses ... to teach them that the [special collections] materials we hold aren’t museum pieces” (311). Ultimately, as the authors explain, this focus on active learning and physical engagement with rare materials proved beneficial to their students and took its final form in the shape of a successful, class-curated exhibit.

Bond and Butler’s article makes an excellent case for the importance of integrating primary documents into the undergraduate curriculum. As Bond notes at the end of the piece, “… working with special collections is a powerful way for undergraduates to engage with the material culture of the past. It provides the means for them to develop their own historical imagination” (315). Some scholars have argued that special collections libraries by nature seem like foreboding places to undergraduates [see Torre (2008), p. 35 ]; if this is the case, what better way to eradicate this misconception than by allowing students to interact with rare materials first-hand, in a classroom setting?

Davison, S. (2009). If we build it, will they come? Strategies for teaching and research with digital special collections. RBM, 10(1), 37-49.

Davison’s recent article focuses on the use of digitized special collections materials within teaching and research. At the beginning of the piece, Davison asserts that while special collections have come quite a long way in terms of access since the beginning of the 2000s, their digital “transformation” is nowhere near complete: “Libraries, special collections, and archives now routinely digitize materials for user access, for Web-based exhibits, and, increasingly, for preservation purposes. Although these activities have seemed revolutionary – by providing increased exposure to collections, making collections available to a much wider variety of users than ever before, and revealing hidden treasures –we are participating in a transformation that has only just begun” (37). Because of this increased access and continued digital transformation, Davison notes, librarians, teachers, students, and researchers can truly gain much information and insight into cultural history by studying digital surrogates of special collections material.

In most cases, the author explains, digital surrogates are used in teaching and/or research for one of two reasons: either as a means of preservation—allowing the “object” in question to be viewed, handled, and manipulated without incurring further damages – or, more commonly, in order to “facilitate access to the information contained by the original item” (38). As such, remote access is enhanced: an entire classroom of students could view the same small fragment of paper from a large projection screen without even leaving their seats, just as a researcher in a different country would be able to consult a rare item in the comfort of his or her own home.
Since increased access is an inherent facet of digitized materials, Davison notes that it simply isn’t enough to just digitize and publish materials onto the internet – librarians and archivists must “[provide] innovative digital services on top of the digital collections is essential to meet the needs of an expanding audience for special collections materials” (40). Meeting these needs, however, proves to be the real challenge for special collections professionals.

Davison argues that the students and researchers of the future will want more than just increased access to special collections materials. In his view, they will want to be able to “[search, retrieve, view, and manipulate] digitized materials across collections in various institutions; to [save, organize, annotate, and share] digital documents from a secure online environment; and to [incorporate] collaborative tools that allow groups of researchers or students to undertake joint investigations or instruction” (48). As such, this article serves as a sort of call-to-arms for the special collections professionals of the future; as Davison argues, increased access to special collections will create a need for enhanced patron services. Special collections librarians, curators, and administrators will have to be prepared to meet those needs in the future.


Duff and Cherry’s article takes an in-depth look at the potential impact of archival orientation sessions and addresses the need for archival education. To determine the effects of archival orientation on student users, the authors conducted an exploratory study within the Yale University archives, using professor and student responses from four orientation sessions. This article presents the findings from the study.

In the Yale University archives, the authors explain, orientation sessions are structured much like one would expect: “The archivist who presents them works with professors and tailors each session to meet the specific needs of a course. These sessions cover the types of material contained in the MSSA collection, access and use, and the retrieval of records. The archivist displays original materials from archival holdings related to the course to engage students. The MSSA’s orientation session also devotes time to searching … the university’s online public catalog” (508). Through this educational model, students learn what the archives offer, how the holdings can be accessed, and how archival materials can influence and support research topics and/or classroom assignments.

But how successful are these orientation sessions? Archivists leading the sessions intend for students to come away having learned the aforementioned skills, but does this really occur? Do archival orientation sessions increase student confidence in using archival materials? Over the course of their study, Duff and Cherry analyzed these questions and found that 65% of students surveyed came to archival orientation sessions without ever having used archival materials. These same students “indicated that they were ‘Not at All Familiar’ with conducting research in an archives” (513). According to the authors, no student reported being “Very Familiar” with conducting archival research. In terms of
confidence, 71% of students rated their confidence level as low, while only 29% reported high levels of confidence in using archival materials.

At the end of the semester, the authors surveyed the same students again and asked about satisfaction with the overall orientation session. The authors note, “88.9% [of students] rated their level of satisfaction at 7 or above, 4 students rated it at 6, and 1 student rated it at 5 ... The mean satisfaction rating was 8.0.” When asked what factors contributed most to their satisfaction and/or increased confidence levels, students reported the importance of interacting with the documents in a hands-on manner and indicated their interest in seeing more examples of primary documents (516). Students also reported that they appreciated that the orientation sessions focused on documents relevant to their class and their assignments. As Duff and Cherry’s article attests, orientation sessions for archival research can be effective if the sessions are well-planned, relevant, and informative. The archival orientation model described here would be an excellent source for other archivists planning future orientation sessions.


In special collections libraries, bibliographic instruction sessions normally focus on how to locate, handle, and evaluate primary source materials or archival documents. Special collections librarians typically teach these techniques by showing students what the authors of this article call the library’s “‘greatest hits’ – canonical types of special collections materials” (87). Essentially, these canonical items (early illustrated books, medieval manuscripts, examples of classic book history, etc.) are the things one would expect to encounter in a typical special collections library; as Alvarez has argued, these canonical, often famous materials provide chances for rich, relevant research and can be used in a myriad of ways in the undergraduate and graduate curriculum. But what about the less awe-inspiring rare materials? As Gardner and Pavelich wonder, “[W]hat of the truly staggering variety of materials in our libraries, materials that are perhaps less polished, less fine, less well known? What purpose do they serve in the classroom?” (86)

As special collections librarians at the University of Chicago, Gardner and Pavelich have worked hard to bridge the gap between classroom and reading room. In their many interactions with undergraduate students, the authors note that they have “[striven] to advance critical thinking skills and ... information literacy,” while teaching students “to seek materials in special collections and evaluate what they find” (88). While books, manuscripts, and monographs – your typical special collections library fare – have played a large role in instructing students how to understand and evaluate primary source materials, Gardner and Pavelich argue that ephemeral materials (once-overlooked materials like broadsides, playbills, scrapbooks, pamphlets) can play an important role in supplementing bibliographic instruction in special collections repositories. The authors assert, “Ephemera can play an important role in [the] contextualizing process, complementing more standard print resources, such as books and archival papers” (88).

To give the reader a bit of insight into just how ephemera might compliment regular print materials, Gardner and Pavelich provide an example of a particular class session focused
on the 1893 World’s Fair. Though the class was somewhat interested in the library’s secondary works regarding the World’s Fair, the authors comment that the students and their professor actually seemed to get more out of the ephemera than the monographs on display: “[they] were particularly interested in individual ephemeral items … including a ticket to the Fair, pocket guides, surviving pamphlets and promotional material, and an individual’s scrapbook. By incorporating these everyday items that … made up the fairgoers’ encounter … the class was presented with ways to think about how the Fair was experienced – and by whom – that added to a sense of context and particularization about the event” (88). Instead of simply reading about the Fair, students were able to see the particulars of it for themselves, perhaps learning a bit about how it was experienced at the time.

Gardner and Pavelich present a convincing argument for the scholarly importance of ephemera found in special collections libraries. As per their examples, it is clear that ephemera can enhance scholarly pursuits, and by providing a “humanizing experience for students” (89), can essentially provide students with a frame of reference for their own lives. [See Barnhill (2008), p. 37 for a discussion of the importance of ephemera in research projects and scholarly pursuits.]


Like Alvarez, Johnson also addresses undergraduate interaction with archives and special collections materials, but moves slightly away from discussing how specific items can be used, preferring to discuss instead the broader picture of how undergraduates view special collections repositories. Johnson’s article laments that more often than not, undergraduate students are put off by the intimidating, restrictive nature of archives and special collections, asserting, “Undergraduate students seldom utilize primary source materials located in departments of archives and special collections, primarily due to a lack of understand of what an archive has to offer and how it is used” (91). If Johnson’s thinking is correct, and undergraduates are intimidated by archives simply because of unfamiliarity, then does the solution to this problem fall to librarians and archivists? What can special collections professionals do to bring students into the library?

Johnson argues that there are at least three things archivists and librarians can do to successfully introduce undergraduates to special collections: help students see archives/special collections as accessible and inviting; fully explain the reasons for rules, restrictions, and security measures; and illustrate to the students the historical importance and research value of archival and rare materials (92). To achieve the first goal, Johnson suggests that librarians and archivists take special care to be patient with undergraduate students who have never before used archives or special collections materials, especially when explaining how materials should be handled. He comments, “A balance is certainly needed between preservation of and access to archival materials, but rudeness and condescension are not appropriate responses to young researchers” (93). Of course it goes without saying that all librarians – not just special collections professionals – to take this approach when interacting with any type of patron.
The second goal – explaining the need for strict archival rules – can sometimes seem daunting to special collections librarians, especially if patrons challenge the rules or attempt to dispute them. Nevertheless, Johnson notes, special collections professionals must take the time to move beyond simply telling students about the policies to explaining *why* the policies are set in place; explaining the rules of the repository “gives students a better understanding of their necessity and seems to melt away some apprehension about using the archives” (94). The third objective – helping students realize the research value of special collections materials – is the trickiest, but most rewarding goal. In striving to meet this goal, Johnson suggests that librarians reach out to the undergraduate population through core classes, perhaps by contacting faculty members and inviting them to bring their students into the archives in order to view relevant, interesting materials that coincide with classroom assignments. This way, students can see how archives and special collections relate to their particular academic endeavors.

Though Johnson’s article covers some of the same ground as other literature regarding undergraduate use of special collections, it does offer some practical, interesting solutions for making archives seem accessible and inviting to the undergraduate population. As Johnson remarks in closing, “The most important thing is actually getting students to overcome their fears and learn what archives have to offer and how they can access this wealth of information” (97). Perhaps more literature like this can help librarians learn new ways for drawing undergraduates into special collections libraries.


“Special collections and archives in college libraries have long been intimidating to undergraduates,” Reynolds and Sauter’s article begins, “They are seen by many as the domain of expert researchers seeking knowledge of arcane subjects, poring over dusty tomes in the furthest reaches of the library” (128). This description might seem like an exaggeration, but unfortunately, Reynolds and Sauter are right on the mark; much of the literature discussing undergraduate perceptions of special collections speaks to the fact that undergrads are quite put off by special collections repositories. Taking into account the articles written on the subject by Johnson, Alvarez, and Torre, it appears that researchers and practitioners alike agree that this misconception occurs for one of two reasons: students either avoid special collections libraries because they aren’t sure how to navigate the buildings, or because – as the authors of this particular piece argue – they are completely unsure of how to use the materials inside. In the interest of eliminating this misguided view of special collections, Reynolds and Sauter – special collections librarians at East Carolina University (ECU) – devised an educational plan that would not only demystify rare materials [see Grigg (2000), p.40 for further discussion of the “demystification” of special collections], but would simultaneously draw undergraduate students into the special collections library.
Teaming with librarians from ECU’s Verona Joyner Langford North Carolina Collection in 2001, freshman composition instructors assigned their students a project which “[asked] them to select an artifact from one of the collections that focuses on an aspect of North Carolina history” (318). Students were then instructed to place the artifact in its historical context, using secondary sources to help explain the importance of the selected item. Initially, the authors note, the purpose of this collaborative assignment was only to get students into the library; once the assignment began, however, librarians and instructors began to realize that exposing students to special collections and primary sources early on in their college careers allowed them to develop strong, solid research skills, and “engaged them through resources that are available somewhere other than online” (319). Students were able to experience first-hand the importance of primary sources and were able to comprehend how special collections are still currently relevant.

Throughout the piece, Reynolds and Sauter discuss the success of their collaborative assignment: the assignment proved incredibly popular among freshman students, as they began to feel more comfortable with special collections library. Students also began to use the collections for other projects: the authors report noticing “a steep rise for both departments for each year that the assignment has been in place in terms of circulation statistics and the number of reference questions answered” (321). The assignment has also helped special collections librarians “identify materials for digitization and inclusion within the Eastern North Carolina Digital Library to expand the available pool of online special collections resources” (321), illustrating how collaborative assignments can prove illuminating for librarians as well as students.

Essentially, Reynolds and Sauter make an excellent case for the importance of collaboration between special collections librarians and faculty members. By using special collections materials for classroom assignments, instructors can assist their students in understanding the historical and intellectual value of primary sources.


Within this 2001 article, Robyns argues for the inclusion of critical thinking skills in archival instruction sessions, asserting that “archivists can and must be more than simply a bridge between … patrons and … collections” (365). Robyns goes on to comment that the time has come for students to learn more than just how to locate archival information; to be truly information literate, he states, students must learn how to critically interpret and analyze primary documents.

In most cases, the author notes, critical thinking skills are taught as a component of bibliographic instruction: students come to the library for an orientation session and are taught how to access library resources, how to conduct searches in library catalogs and/or databases, and how to determine the research value of a book, article, periodical, etc. More often than not, these instruction sessions are conducted by reference or instruction librarians. But what about archivists? Robyns comments, “Unfortunately, the literature indicates that archivists are not doing the same thing and have been slow to integrate
critical thinking skills into their classes and workshops on basic research skills in archives” (372). This comes as a startling realization, especially as other authors have argued that archival critical thinking skills differ greatly from general critical thinking skills. When considering that archival research requires a special set of critical thinking skills, Robyns’ argument certainly makes sense; after all, a great deal of current archival literature has noted students’ relative inexperience with primary sources and their reluctance to use archival documents for research purposes, simply because they do not possess the correct critical tools. However, one can’t help but wonder how much power the archivist might have in this area of education. Is it right – or even possible – for archivists to be completely responsible for teaching critical thinking skills to college-level students?

To this end, Robyns asserts that perhaps archivists do need some sort of collegial assistance in this area if they are to help students learn how to think critically about archives. Faculty support of library instruction is always valuable; is it such a stretch to think that university faculty members would support archivists in their teaching of archival skills? Robyns surveyed a few archival colleagues to find out and discovered that, “When asked if the history department works with the archivist in providing training to undergraduates in basic research methods, all but one responded with a yes. However, in most cases, the archivist initiated the collaboration by offering the history department some type of prepared workshop or presentation. One archivist summed up his frustration with the faculty’s apparent indifference this way: ‘In many ways it has been an uphill task, because it seems a number of faculty members do not share my view that systematic archival research should be an indispensable part of teaching undergraduate history, that is, the lab work of history instruction’” (370).

In some cases, it seems that teaching archival critical thinking skills has been met with apathy and disinterest of faculty, who may or may not see these skills as integral to understanding history. To this end, Robyns’ article presents a sound argument regarding the importance of teaching archival critical thinking, but warns that faculty support is necessary for its implementation and success.


Through the case study recounted in their 2002 article, authors Schmiesing and Hollis aim to help faculty members and librarians in determining methods of collaboration for merging special collections and college-level instruction. According to the authors, the partnership between special collections librarian and faculty member has the potential to “… provide opportunities for active and collaborative learning; create a teaching environment that appeals to diverse learning styles; motivate students both to discuss class readings in further detail and to pursue interests that go beyond class readings; and, particularly on the graduate level, create a research laboratory in which students polish their archival research skills and learn techniques for writing for diverse scholarly and public audiences” (466). In short, incorporating special collections into the university
curriculum can foster richer, more relevant learning experiences for the students and instructors involved.

In order to test this theory, Schmiesing and Hollis – a University of Colorado (UC) professor of Germanic and Slavic Languages and a special collections associate professor, respectively – came together to teach a joint seminar using special collections materials. Though the authors recount many aspects of their approach to co-teaching a course, the most interesting aspect is the instructional design. Before the session, Professor Schmiesing selected a number of materials from the UC special collections library and teaches the students a bit about the materials before they even visit the library. As the librarian leading the session, Hollis already knew which materials Schmiesing wanted to show the class; this allowed Hollis to put together some background information on the materials in preparation for their library visit.

The authors explain, “On the day of their visit, students are given an informal worksheet that contains general information concerning the various texts, suggested discussion questions, references to page numbers of passages or entries they may find interesting, and other facts and trivia. Special collections librarians can assist faculty members by making available any information concerning the materials on display, e.g., brochures or captions from previous exhibits in which a book or books to be viewed were featured” (474). Through this method of co-teaching, students are provided with “bookended” information about the materials – which they receive both before and after interacting with the items. This instruction method provides students with a better understanding of special collections materials and how they can relate to humanities studies.

Essentially, this article serves as another reminder of the importance of collaboration – not only within special collections, but throughout the entire university population. As other authors have argued, faculty and librarian collaboration can have a profound impact on student learning [see Smith (2006), below]. Within their article, Schmiesing and Hollis present a solid method of instructional collaboration.


In this article, Smith – director of the Cushing Memorial Library and Archives at Texas A&M University – presents a rather philosophical discussion of the intersection of special collections and education. Over the course of the piece, Smith argues that as a profession, special collections have never truly placed much emphasis on education or instruction. He comments, “Outreach and education have simply not been mainstays of our work, especially when compared to our colleagues in public and school libraries or even, for that matter, to the general academic library” (32). Harsh words, but perhaps true; after all, countless pieces have been authored about the unfortunate ways in which undergraduates wrongfully view special collections libraries and the people who work inside them. Smith’s article aims to determine just why education has been overlooked by the special collections world and what changes might be made to the profession in the interest of placing more emphasis on education and outreach.
In the past, special collections repositories have been seen as musty, uninviting “treasure rooms,” only open to serious researchers aiming to fulfill specific scholarly purposes. At present, however, many special collections librarians, curators, and administrators have called for special collections repositories to offer more open, welcoming public services so that visitors beyond the serious scholar may take advantage of the library’s holdings. An endeavor such as this often requires implementation of new technologies, staff integration, collection reorganization, or building renovations, and a time where money is tight and extra expenses are scarce, Smith notes, education and outreach become imperative in providing justification for new and improved library resources: “Education and outreach are not only important for bringing people into these new spaces, they are also essential for justifying the expense of building them in the first place and continuing to maintain them” (32). Education and outreach are, essentially, the ultimate public services, and in Smith’s view, the special collections repository of today cannot afford to neglect these needs.

Smith argues that this lack of emphasis on education truly comes at the peril of the special collections profession. Research and education go hand-in-hand, he comments, and special collections professionals are charged with placing equal emphasis on both areas. Smith argues, “Our first concern is – and always has been – supporting research and researchers. Thus, we emphasize the things that we see as directly contributing to the production of scholarship. Acquiring, cataloging, and preserving material are indeed core activities and must remain so. But our commitment to teaching must also broaden and deepen. … outreach is something we cannot afford to do without, regardless of the climate around us. It is simply the right thing to do” (33).

Ultimately, Smith asserts, special collections repositories cannot claim to truly support research and simultaneously overlook teaching, instruction, and outreach; not only does this imbalance fundamentally not make sense, but it also goes against the purpose of the special collections profession and the core competencies laid out by the ACRL [see RBMS competencies for special collections professionals (2008), p. 51]. In short, refusing outreach is detrimental to the profession and to the people who special collections professional claim to serve: “People know we have stuff,” Smith comments, “and they want to see it. It is in our interest to find a way to accomplish this. Indeed, it would an abdication of our responsibility if we did not.” (34). Special collections professionals have the potential to change this course, he argues, only if they begin seeing themselves as teachers, and not simply guardians of stuff in treasure rooms, closed off to the public.


Stam’s somewhat whimsical, yet thought-provoking article presents a view of special collections work as a bridge that helps to connect users to information and understanding. At the onset of the article, Stam sets out a compelling metaphor that describes both special collections users and the profession as a whole: “Passing through and over the bridge, or special collections, are several categories of traffic, including the occasional
user, regular users, and a wider public of casual travelers. These users might travel on separate lanes and at various speeds and with different levels of concentration. Whether the travelers’ motivation is practical, recreational, or aesthetic, their experience of using the special collections bridge can contribute to both their personal fulfillment and a larger societal goal of intellectual connectedness and mobility” (18). In her view, special collections work is the unique passageway that allows users to reach new paths of knowledge.

Though Stam’s comparison may seem silly at first, it actually makes a great deal of sense when considering the purpose and scope of the special collections profession. Not too long ago, special collections were regarded as stuffy, uninviting treasure rooms; now, however, many librarians and administrators have adamantly pushed for more openness within special collections, hoping to draw more patrons in to interact with special collections materials. Stam’s piece reflects that attitude perfectly, arguing that education and outreach are the real keys to keeping special collections exciting, engaging, and relevant. Special collections professionals, Stam states, should participate in professional development activities and continuing education courses, just as they should foster continued learning for students and other users by sponsoring exhibits, lectures, and other outreach programs. In this way, special collections will remain a unique bridge to a special type of education for students, faculty, scholars, and independent users.


The commonly-used term “information literacy” can take on a number of different meanings when applied in different library settings; in the typical college and/or research library setting, students become “information literate” when they are successfully able to interact with information sources in a myriad of ways. The ACRL Information Literacy Competency Standards for Higher Education assert that upon completing some sort of information literacy training, library instruction course, or bibliographic session, students should be expected to know how to do the following: “Standard One: [determine] the nature and extent of the information needed; Two: [assess] information effectively and efficiently; Three: [evaluate] information critically; Four: [use] information to accomplish a specific purpose; and Five: [use] information ethically” (1). These five general standards are supported by a number of performance indicators and learning outcomes which are used to measure the level of information literacy achieved by students.

In this 2006 article, authors Sutton and Knight – both librarians – discuss a specific aspect of information literacy as it relates to college students, library resources, and bibliographic instruction. Over the course of several instruction sessions, Sutton and Knight observed that students had little to no concept of the difference between primary and secondary sources, and most were unable to differentiate between the two. Sutton and Knight consulted the aforementioned ACRL Information Literacy Standards, and found that two of the customary learning outcomes of Standard One explicitly mention
the importance of learning the difference between primary and secondary sources. Since the authors had already noticed that the majority of the students they encountered could not meet these standards, they decided “to try a new approach to general library instruction that [would include] a discussion of primary sources with an emphasis on how they relate to secondary sources” (320), thereby illustrating for students the importance of primary documents in research endeavors.

Though the initial planning seemed simple, Sutton and Knight explain that they found it challenging when determining the appropriate balance between teaching primary and secondary resources within a library instruction session. The authors realized that the students and professors at their institution were mostly focused on learning how to locate books and articles – secondary sources; however, the authors also realized that “to fully comprehend the context of these secondary sources, students need to understand how primary sources are used in their creation” (321). To achieve this, the authors planned a two-part instruction session that would naturally progress from primary source information to secondary source information. Students would learn how to utilize library resources – databases, bibliographic guides, etc. – to locate each type of resource; in this way, students would become acquainted with special collections, general collections, and basic library functions, all in one library instruction session. On the whole, these sessions proved extremely successful: by interacting with special collections resources firsthand, students were able to “literally grasp the nature of primary sources” (322). Additionally, by learning about the impact of primary documents on secondary sources, students were able to “[analyze] how knowledge is created,” something that “can be applied to information resources in all areas of their lives” (323).

In closing, it should be noted that research in this area is very limited. Sutton and Knight comment that prior to implementing their planned instruction session, they attempted to find relevant literature from fellow librarians that would assist them in their plan to incorporate primary sources into general library instruction. Their findings were notable in that they could not locate any resources that would be of practical help to them: “While the literature recognizes the value of learning about primary resources and using archival materials, there is little to no research that describes practical ways for librarians to extend this instruction beyond the special collections department” (321). Unfortunately, this still seems to be the case at present. Sutton and Knight’s article, however, is a great example of how to effectively primary sources can be used effectively in the library classroom and is an excellent resource for instruction librarians and special collections librarians desiring to teach students about the intersection of primary and secondary resources. [See Yakel (2004), p. 35 for further discussion of information literacy for primary sources.]

Akin to Johnson, Torre’s article also addresses some of the common misconceptions of archives and special collections repositories – namely the “dual message of encouragement and restrictiveness” (36) that is often perpetuated by the very nature of special collections themselves. Rare, historical materials are certainly valuable and are often fragile; thus, stringently enforced rules and constant surveillance are key to ensuring their safety. But what happens when protecting the materials gets in the way of their use? Torre comments that special collections libraries often seem exclusive and uninviting to those on the outside, a perception that might have detrimental effects on undergraduate populations in particular: “Today’s undergraduate may one day be the professional scholar, the academic, or the donor that will play a part in the vitalization of our collections. For an undergraduate student, an overly formal environment … may appear arrogant and unwelcoming”(37). As the scholars and leaders of the future, undergraduate students can gain invaluable insight into the past by learning how to engage with rare, historical materials; however, this is only possible if the special collections library is willing to reach out to the undergraduate population.

Expanding on Torre’s assertions about the need for primary sources in undergraduate education, it seems that perhaps the best way to effectively orient new students to special collections materials and services is to provide them with some sort of library instruction as soon as they begin their first year of college. Archivists and special collections librarians could visit first-year seminar classes and provide students with informal orientation sessions aimed at demystifying rare materials, while simultaneously providing an image of the special collections library as inviting, accommodating, and helpful place. In Torre’s view, it is unlikely that undergraduates will pluck up the courage to visit special collections repositories unless special collections librarians reach out to them and invite them in.


Yakel begins her article by highlighting “two converging trends” that have caused an increased awareness of and interest in archives and primary sources. For one, she notes, archivists currently publish increasing amounts of archival information online; at present, everything ranging from contact information to finding aids to digitized materials is available electronically, either through webpages or databases. Additionally, Yakel asserts, educators from across the globe have begun to realize that primary resources are a valuable tool in teaching critical thinking and information retrieval skills. In the author’s view, these current trends have combined to provide archivists with an ever-expanding number of opportunities for inspiring information literacy for primary sources. If archivists take it upon themselves to rethink their role in archival education, Yakel argues, perhaps they can help to “create a generation that is literate in identifying, selecting, and using archives and manuscripts” (61).
Acknowledging that “archives are not very transparent” and can be somewhat difficult to navigate, Yakel proposes that changes be made to previously-accepted methods of archival user education so that researchers can more easily navigate archives and the primary documents located within. In order to achieve this goal, archivists must be proactive in reassessing archival education, particularly as the archival world and the digital world begin to increasingly overlap. She comments, “In the virtual environment, the reference archivist cannot scan the reading room and note who is lingering a bit too long over the finding aids to detect confusion … identifying the knowledge and skills necessary for researchers to make effective use of the archives becomes more important as archival research … can now be done, at least in part, in libraries, classrooms, and at home” (63).

It is true that archives are now more accessible than ever, yet in Yakel’s view, this increased access has put up some barriers for archival researchers: for some researchers, it is one thing to listen to an archivist explain face-to-face how to use a finding aid or interpret a primary document, but quite another thing to attempt to figure it out for themselves while sitting in front of a computer screen. In order to keep up with the digital world and all it has to offer, Yakel argues that archivists must step in and teach users how to properly interact with archives both in person and remotely, in both analog and digital formats. In this way, archivists can significantly impact information literacy for archives, manuscripts, and primary sources.
Outreach/ Collection use: the process of identifying and providing services to constituencies with needs relevant to the repository's mission, especially underserved groups, and tailoring services to meet those needs; outreach activities may include exhibits of collections, workshops, publications, and educational programs. Collection use also includes scholarly interactions with materials, use of materials for research purposes, and reference services (SAA glossary, 2005).


Barnhill’s brief but convincing article makes a strong case for the inclusion of ephemera in special collections libraries. Over the course of the piece, she explains not only the purpose of collecting, cataloging, and displaying ephemera within libraries, but also highlights some of the rich, vibrant research that has been – and can be – conducted with the use of ephemeral materials.

According to the Society of American Archivists’ Glossary of Archival Terminology, “ephemera” is defined as: “materials, usually printed documents, created for a specific, limited purpose, and generally designed to be discarded after use. Examples of ephemera include advertisements, tickets, brochures, and receipts … individuals often collect ephemera as mementos or souvenirs because of their association with some person, event, or subject” (SAA glossary, 2005). In Barnhill’s view, ephemera has long been overlooked in serious academic circles, largely because it is regarded as unimportant, transitory, and perhaps of little research value when compared to the types of materials typically found in special collections repositories. Furthermore, she notes, ephemeral materials are often costly to acquire, typically prove difficult to catalog or describe, and are seldom requested by any specific academic audience. As Barnhill concedes, “… one of the challenges before the special collections community is to justify … the cost of acquiring, preserving, and making accessible ephemera for which there is no demand from a specific academic field. It is difficult to substantiate large expenses for collections that have no readily definable audience” (127). Ultimately, these challenges have frustrated curators, librarians, and library administrators alike, and have caused ephemera to be viewed in a non-flattering light.

If this is the case, why fight for the inclusion of ephemera in special collections libraries? If no specific academic disciplines request or make use of ephemera, why collect it at all? What effect could ephemera possibly have on research questions if no one wants to consult it? Barnhill argues that ephemera is absolutely essential to certain research projects, stating that in some cases, ephemera can actually inform a research topic, not simply support it. She cites two particular scholarly works (a history of pets in America, and a history of American girls’ schools and academies) whose research theses were completely changed by the discovery of applicable ephemeral items. In both of these instances, Barnhill asserts, ephemera not only provided the researchers with historic evidence, but in fact steered their research in a new direction that might not have been reached by using the usual primary or secondary sources.
Barnhill also goes on to argue that by placing importance on ephemera as a potential research tool, libraries send a very specific message to scholars as well as others involved with their institution: “Crafting a collection of ephemera to enable scholars to further the research agenda of an institution is a fine strategy and one that can be used for fund-raising purposes” (130). In Barnhill’s view, collecting ephemera has a cyclical impact: spending money on acquiring and processing ephemeral resources will lead to a higher level of scholarship, as more and more researchers will come to the library to use ephemera collections; in turn, scholars will see these institutions and their collections as integral to their research endeavors. This prestige can be use to garner endowments, grants, extra funds, and additional support – both financial and political – for the institution at large.

Though a great deal could be said about other aspects of ephemera in libraries, Barnhill’s message is clear: ephemera plays a very important role within our research communities, as this genre of materials provide both researchers and students with context information about specific moments in time and “shed a great deal of light on history and culture” (135). According to Barnhill’s article, special collections should make every effort possible to acquire, preserve, and display every bit of ephemera they can; future research will be all the better for it. [See Gardner and Pavelich (2008), p. 26 for a discussion regarding the use of ephemera in library instruction.]

**Blouin, F. (2010). Thoughts on special collections and our research communities. RBM, 11(1), 23-31.**

In today’s increasingly digital society, information access and retrieval have changed dramatically. Research can be conducted entirely online, from the comfort of one’s own home or office, and scholars and students alike can conceivably craft an entire research project without even setting foot inside a library building. To some, this ultimate convenience is the ultimate freedom: information can be found in digital or electronic formats at the touch of a button, questions can be answered anytime of the day or night, and remote research can be conducted locally for next to nothing. To others, however, the increasing prevalence of digital information has generated more questions than it has answered. In the library world, for instance, heightened access to electronic information has caused librarians and information scholars to seriously question the future of the library itself. Will digital objects eventually remove the need for paper-based items? What about the library as place? Will students or scholars ever need to physically interact with the library building, its staff, or its collections? Countless questions like these arise when considering the ever-increasing demand for electronic resources and its effect on the library of the future.

Special collections have also been affected by the advent and increasing popularity of electronic resources. After all, special collections repositories have historically focused on collecting only paper-based materials; only in the last few years have special collections professionals begun to incorporate digital materials, audio-visual resources, and electronic records into their collecting patterns. While these new types of resources
present greater challenges within the special collections world (particularly in terms of cataloging, preservation, and access), adding them to a collection ultimately allows special collections repositories to reach out to today’s users in new ways. Due to increasing advances in technology, special collections repositories are now able to focus on how their resources are electronically organized and accessed, and are essentially able to bring the reading room to the researcher, instead of the other way around.

Nevertheless, as Blouin’s article points out, increased digitization and enhanced access to collections by way of electronic surrogates does have its pitfalls, particularly in terms of research and scholarly inquiry. In Blouin’s view, the inseparable connection between the repository building and the tangible materials house within has always been one of the most enduring aspects of special collections. He comments, “There is a distinct physicality in the use of these repositories as well as a broad range of subjective associations that, among other effects, establish bonds for modern researchers with previous generations of scholars, deepening scholarly commitments” (25). Essentially, the intersection of grand, historic architecture with grand, historic ideas allows researchers to consider the past as part of the present, something which seems to have been the aim of special collections all along. Blouin goes on to assert that an increasing dependence on digitization has perhaps dulled this sense of historicism and significantly affected scholarly interactions with special collections. In their infancy, he comments, these repositories were formed as historic “windows to real pasts” (28), repositories meant to offer glimpses of specific moments in time. In this way, the collections themselves “became actual, as well as figurative, monuments to national pasts and future purpose” (28). At present however, Blouin laments, some of this historic power is lost when researchers interact with special collections in a totally electronic way.

Though it is certainly unrealistic (and perhaps impossible) for special collections repositories to completely revert to purely physical methods of access (i.e., no websites, no digital resources, etc.), it is worth considering the impact of electronic tools upon all forms of scholarly research. In Blouin’s view, refusing new technology is not the solution; rather, special collections should strive to be interdisciplinary and should serve “as a point of mediation: between where knowledge has come from and where knowledge is going; between how knowledge was conceived and how it currently is constructed; between old technologies and new technologies …” (31). In this way, special collections can bridge the gap between the old and the new and can properly serve seasoned and inexperienced scholars alike.


This interesting monograph essentially reads as a “greatest hits” collection of the rarest, most interesting special collections items currently held by ARL-member libraries. As the editors note, “[The book] is not a comprehensive view or a directory but instead an array of profiles that exemplify a spectrum of rare and special collections in research libraries” (5). A spectrum it is, indeed: within the pages of this monograph, the serious researcher
and the casual viewer alike are able to see such materials that vary from public health
film negatives (courtesy National Library of Medicine), prints from Audubon’s *Birds of
America* (courtesy University of South Carolina), and an authentic draft of an Emily
Dickinson poem (courtesy Harvard University). Flipping through the pages reveals
treasure after treasure, and it is clear that every repository represented in this volume is
extraordinarily proud of their vast and varied holdings.

Though there isn’t much to be said about the compendium in the way of illuminating
research, the most important thing about this work is the fact that it exists at all. In the
preface, the editors acknowledge the previously-accepted notion of “special collections as
a domain reserved for specialists” (5), an idea that special collections professionals have
tirelessly campaigned to eradicate through increased public services and enhanced access
to special collections materials. While rare materials and primary documents are
valuable, unique, and in need of tighter protection than general collections, they are –
above all – meant to be used; that very reason is why special collections librarianship
exists. A compendium such as this keeps the awe of rare and special materials alive,
while displaying these materials to the world, thereby showing that special collections are
meant to be accessible to all users, not hidden away in a dusty, musty store room.

**Grigg, S. (2000). Integration or coordination? Reorganization for special collections
programs. The Journal of Academic Librarianship, 26(2), 133-137.**

Grigg’s article addresses an issue from the opposite side of the special collections
reference desk – the structure and internal organization of special collections repositories.
At first, this issue might not seem immediately applicable to public services; patrons are
unlikely to ever notice minor (or perhaps even major) personnel changes or structural
issues. What impact, if any, could internal issues have on public services? In Grigg’s
view, massive internal reorganization (reallocating of staff, designating one reading room
for all collections, etc.) of special collections repositories can have a profound effect on
public services: that is, if the reorganization is conducted effectively, efficiently, and
thoroughly. Drawing on her own experiences as a head of the Alaska and Polar Regions
department (APR), a special collection located at University of Alaska Fairbanks (UAF),
Grigg outlines her involvement in a five-year library reorganization plan that, although
tenuous at times, was ultimately successful.

Regarding UAF’s plan for library reorganization, Grigg states, “In support of its
emphasis on user satisfaction, the plan charged APR to ‘demystify access to special
collections’ by improving delivery of descriptive information” (134). As a relative
newcomer to UAF, Grigg had already noticed that the structure of some of the library’s
collections seemed daunting to outsiders; none of the services appeared intuitive to new
users, and the organization of materials proved ultimately cumbersome. With these
concerns in mind, Grigg decided to expand the “demystification” suggested by the library
plan “to mean that we should help all kinds of outsiders to approach us in terms of their
needs instead of ours” (134). To achieve this goal, staff were cross-trained so that they
would be able to effectively serve researchers, donors, and students alike, and new task
forces were created in order to assess security of the collections and the user-friendliness
of the library’s online resources. Essentially, Grigg and her staff approached their reorganization not merely as an internal staff issue, but as a series of changes necessary to enhance the library experiences of their users.

Library reorganization, however, does have its potential problems. Grigg notes that as workplace lines are redrawn and additional duties are introduced, staff members may begin to question their workplace identity. While striving to serve users, answer reference questions, and generally maintain public services, library staff might find themselves with a list of new duties – some of which may seem confusing at first. Time, organization, and persistence are all that can really combat this workplace issue; however, Grigg notes that over time, library reorganization can foster a sense of unity and collaboration that might not have existed before. In time, both library staff and library patrons will reap the benefits of a newly-integrated system.


As evidenced by much of the current literature regarding undergraduate use of special collections libraries (see Johnson, 2006 and Torre, 2008, above), it is certainly clear that many college students perceive archives and rare book/manuscript collections as intimidating places only open to scholars. Of course, this could not be further from the truth: special collections repositories are full of rich, relevant materials just waiting to be used by undergraduate students. The trouble, however, is letting the students know exactly what kinds of materials are available and how those materials might be of use to them throughout their academic careers.

In order to eradicate the common misconception of special collections libraries as “off-limits,” librarians at the University of Chicago’s Special Collections Research Center (SCRC) decided to experiment with new and unique programs aimed solely at undergraduate students. Using holiday study breaks as opportunities for outreach, librarians planned two themed programs: “Love in the Stacks” – a Valentine’s Day event – and “Things that Go Bump in the Stacks” – a Halloween-themed program. As the authors note, these programs were specifically designed to “attract undergraduates through a fun theme event that would both introduce and energize students to the exciting collections and research possibilities in special collections” (145).

Though SCRC librarians faced some challenges in promoting and monitoring the events, the programs were ultimately incredibly successful: “Love in the Stacks” drew 130 people, while “Things that Go Bump in the Stacks” attracted 170 attendees. As the authors explain, the success of the programs hinged on several key factors, the most important of which proved to be how the programs were marketed to the university community. SCRC librarians relied upon very deliberate, focused publicity methods in order to attract patrons; instead of merely printing up and disseminating a few hundred fliers, librarians identified high-traffic campus locations and placed visually-striking posters in these areas. Librarians also reached out to faculty members in related academic
departments: “Organizers examined the course catalog to identify college classes that related to the themes planned for the events ... subject specialists contacted the faculty members who taught these classes, highlighting that some collections on display may be appropriate for use in student research” (147). Doing so allowed librarians to illustrate the relevance of the materials before the students ever even walked through the library door.

This article highlights a fun, contemporary approach to bringing undergraduate students into special collections libraries. By reaching out to students and making rare materials seem entertaining, relevant, and inviting, University of Chicago librarians were able encourage student research in special collections. Carefully developed programs like these could certainly have a positive impact on undergraduate students, and could potentially allow them to view special collections in a completely new light.


In this piece, O’Donnell considers the role of reference in academic archives and provides some understanding about how archival reference services differ from standard academic library reference services. In doing so, O’Donnell aims to shed some light on the process of reference in an archival setting, something which – at the time of this article’s publication – had not really been attempted by other archivists or scholars in the field. O’Donnell notes this fact right off the bat, stating, “… the literature on archival reference is sparse, and those who have written on it over the years have commented on this scarcity … The consensus of opinion seems to be that archival reference is still not receiving the attention it should” (110).

Despite the insufficient amount of available literature devoted to explicating the ins and outs of archival reference, O’Donnell believes the issue is still important, and that first and foremost, one should recognize the fundamental differences between standard library reference and archival reference. Perhaps the greatest dissimilarity between these two types of reference services is the amount of material browsing allowed. O’Donnell states that “one of the first things that most researchers find different about being in an archive is the fact that they are not allowed to walk freely through the stacks” (112) Of course, this restriction is not set in place to deter prospective researchers, but is used rather as a precautionary measure to ensure security of the archival collections. As O’Donnell goes on to explain, “… most of the material found in archives is unique, and if it is stolen or damaged, it cannot be replaced” (113). Additionally, archival materials are typically very fragile, and therefore require that librarians monitor patrons as they handle documents. With these restrictions set in place, archival reference services are automatically different from standard reference services: the reference archivist or special collections librarian must intercede and directly interact with the patron in order to assist them in finding specific materials; in an academic library, however, users have the ability browse online databases, catalogs, and library stacks at their leisure, sometimes without ever interacting with library staff members.
Archival reference questions also differ from general library reference questions, not only in regards to the subject of the questions (archival questions are usually historical or interpretive in nature), but in terms of the time required to provide a proper answer to the inquiry. Most archival reference questions generally require extensive onsite research, O’Donnell notes, commenting that “answering these questions will often require original research on the part of the archives staff” (118). Therefore, in O’Donnell’s view, archival reference differs even further from standard library reference. However, while it may take some time to pinpoint a specific answer using archival materials, it may not be fair to say that archival reference and standard reference differ in this way; it seems that plenty of academic reference librarians could recount instances of having spent hours upon hours on a reference interview or a particularly tricky question. O’Donnell’s assessment of archival reference questions as always time-consuming seems inaccurate, and at worse, unfair.

Though O’Donnell’s article is somewhat informative about the nature of archival reference, it is hardly groundbreaking. Her main argument seems to hinge on the fact that “the archival profession is a distinct one” that needs to be “better appreciated and understood … to function better within the academic community” (118). She mentions that archives need to be “better understood,” but never gives any real solutions to how this might be achieved. On the whole, the piece presents a marginalistic view of archives, intent on conveying how archives and their missions ultimately differ from standard library services; at present, thankfully, that seems not to be the case.


Rinaldy’s report of current trends in rare book and other special collections repositories aims to analyze the nature of the special collections profession in the 21st century and the present state of special collections management. In order to assess these current issues, Rinaldy conducted interviews with librarians and/or administrators at nine special collections libraries/repositories: the Burns Rare Book Library, Boston College; the Buffalo and Erie County Public Library; the Perry Special Collections at Brigham Young University; the Huntington Library; the Newberry Library; the San Antonio Public Library; the Watkinson Library, Trinity College; the Special Collections Research Center, Southern Illinois University-Carbondale; and the Bancroft Library, University of California at Berkeley (5). Interview questions focused on varied areas of special collections work, such as collection scope, acquisitions/development, security procedures, outreach and publicity, and so on.

The most interest aspect of the interviews recounted in Rinaldy’s report are the disparate responses to the question of outreach and publicity. While a few of the special collections libraries profiled reported actively participating in outreach initiatives, several mentioned a lack of progress in the same area. For instance, the special collections librarian at Boston College admitted, “We don’t do a very good job of publicizing what we have … we have an individual web presence from the research library, but we don’t do a very good job directing our researchers to the special collections” (11). In much the same vein,
the public services manager of the San Antonio Public Library commented, “[We have] archival material and film that people don’t know about because it’s not on our catalog or website. If people don’t know you have it, they’re not going to come there to use it” (46).

On the other hand, other repositories reported strong outreach efforts. The Special Collections Research Center at Southern Illinois University-Carbondale reported “… a number of different outreach tools, including presentations, lectures, tour, workshops, and brochures. Presentations include teaching undergraduates and graduates on the use of primary research materials and specific SCRC holdings” (59). The curator of rare books at the University of California at Berkeley expressed the importance of publicity in bringing students to the library, stating, “I love the interaction with the students, getting them in here, demystifying the library to some extent, getting them to realize that this is a resource. We go out in the wide world and bring in this stuff from all over the place, and the only reason we do it is so that you will use it” (67).

From these varied responses, it is clear that not all special collections repositories view publicity in the same manner. In Rinaldy’s view, this comes as a detrimental blow to some repositories, as technology advances rapidly and demand for searchable information grows higher and higher. She comments, “Trends in special collections libraries management are relatively stable in terms of acquisitions, staff, and preservation strategies, but are in a transition with newer issues as choosing new technologies and growing an online presence with more searchable, browsable features … A strong web presence and active local programming are crucial to making the collection … materials available for researchers” (6). Essentially, researchers won’t visit the library if they don’t know how it will help them; to this end, special collections repositories must publicize their holdings if they want to make them available to researchers.


Like the documents produced by Center and Lancaster (2004) and Sudduth, et al. (2005) [see pp. 11 and 19, respectively], Turcotte and Nemmers’ work presents the results of a year-long survey of special collections libraries. While Center and Lancaster reported on special collections’ security procedures and the document by Sudduth, et. al. analyzed the state of special collections in academic libraries, Turcotte and Nemmers take a look at the nature of public services within special collections libraries. In the introduction, the authors explain their decision to analyze special collections public services, asserting that “… the manner in which special collections provide access to their holdings is as important as the substance and extent of the holdings they collect” (11).

Turcotte and Nemmers distributed their survey to all ARL member libraries (123 libraries total) in March 2006. According to their analysis, 79 of 123 libraries responded. The majority of the responding libraries (35 or 44%) indicated that they had one single special collections unit, while the remainder were divided into two distinct groups: 25 libraries (32%) reported having one primary special collections unit and additional collections – either kept in branches or housed in other libraries – and the remaining 11 libraries (14%)
noted having multiple special collections units scattered across a number of libraries. With respondents coming from such varied backgrounds, the authors were able to get a sense of a wide range of public services procedures.

The survey asked respondents a number of questions about several areas of public services in their own respective library: patron registration, public services staffing, reference, public services transaction tracking, public service evaluation, public services promotion, and changes in public services, etc. Since Turcotte and Nemmers’ document is the more recent of the survey-oriented pieces included here, it is interesting to consider the section of the survey regarding changes in public services, particularly in terms of changes related to technology and online access. As the authors explain, “The survey asked respondents to briefly describe any significant changes in reference/public services in the previous few years …Not surprisingly numerous respondents discussed the impact of technology and digitization. The general consensus was that digitization efforts have been increasing steadily in recent years and will only continue to increase” (16). The authors go on to report that 17 of the survey respondents noted a significant increase in the amount of online inquiries, reference requests, and transactions, both through chat and email services.

Like Davison and Prochaska argue [see pp. 24 and 17, respectively], technological advances have had a profound effect on special collections, even in terms of face-to-face interaction. Though patrons still utilize special collections library resources in person on-site, electronic communications have changed the way remote patrons are able to access special collections from off-site locations. As the authors comment, “The availability of descriptive information for large percentages of processed materials clearly impacts reference and public services activities. Information about holdings can be disseminated to a wider audience and researchers can discover this information more easily. As some [survey] respondents commented, the number of online reference requests has increased and the nature of reference requests has changed” (17). Essentially, as the survey revealed, special collections patrons have begun to craft more in-depth, detailed reference requests because “patrons have access to detailed descriptive information prior to interacting with reference staff” (17). While this revelation can be seen as a positive change for special collections – after all, better access to materials allows for increased use of materials – it can perhaps be seen as a potential concern for special collections public services. If patrons increasingly expect more and more electronic access to collections, resources, and even staff members, how will this affect the future of special collections public services? Will users eventually refuse to visit the library in person to interact with librarians and tangible items? Will digital surrogates and electronic answers to reference requests completely eliminate the need for person-to-person interaction in special collections repositories? At present, it is impossible to tell, but it is certainly worth considering.

As Turcotte and Nemmers’ survey found, special collections are constantly in flux, especially in terms of digitization and electronic access to information. At the time of the survey (2006), technological advances had already begun to impact special collections research, instruction, and access; at present (2010), technology has changed special
collections even more. In another four years, special collections public services may be completely electronic – who knows. No matter what, special collections librarians will have to remain informed about new technological advances in order to keep their collections and repositories relevant to the current information landscape, whatever that may be.
**Professional Development:** development and maintenance of key knowledge regarding current professional issues, theories, and best practices within a selected field (RBMS, 2008).


In this 2003 article, Cloonan and Berger discuss the ever-changing nature of special collections librarianship, highlighting the need for librarians and archivists to remain abreast of new technologies, preservation needs, and changes in methods of information management. Although the article is several years old at present, the authors draw attention to some interesting issues that still affect today’s special collections professionals.

For example, Cloonan and Berger briefly touch on some of the common questions often posed about digital information, many of which are still currently debated among librarians and archivists. The authors observe, “[T]here is an emerging world of experiential, dynamic, and interactive records that will soon be under the aegis of our libraries and archives. The key issue here is preservation: is it preservable? Who will be responsible for data storage? Data structure? Information integrity? Object integrity? Who will pay for its preservation? We have yet to adopt reliable strategies for preserving and maintaining any digital materials” (11). Though the last statement might not ring completely true at present, the questions posed in this section of the article are still prevalent issues within special collections literature. After all, special collections librarians have always been stewards of physical materials, professionals charged with keeping watch over books and other tangible artifacts – that aspect of the profession has not changed. Nevertheless, in the face of an increasingly digital world, special collections librarians and archivists must stay informed about new technologies and innovative methods of providing electronic access to users.

Interestingly, despite spending much of the article discussing the looming challenges brought by increasingly digital materials, Cloonan and Berger go on to place special emphasis on preservation – particularly, the librarian as preservationist, which is a notable idea. In most special collections repositories, preservation is an entirely separate department, usually lead by its own department head/staff. Though special collections professionals are typically at least somewhat familiar with preservation methods and standards, those staff members not explicitly on the preservation staff are not expected to know everything about preserving old materials. According to Cloonan and Berger, however, this should not be the case. The authors argue, “One of our key responsibilities – related to our primary directive of making our materials accessible – is to know as much as we can about the latest developments in conservation and preservation for a very broad range of holdings” (12).

This idea is certainly worth mentioning, as the authors seem to argue (for a form of integration among special collections staff members [see Grigg (2000), p. 40]. Everyone
should know something about everyone else’s job: it is no longer acceptable that special collections staff members narrowly focus their particular job only. In essence, Cloonan and Berger propose that integration of collections, continued professional development, and interaction among staff members seem to be integral issues in propelling special collections management into the 21st century.


This 2009 piece by Dooley came about as a response to some of the challenges and problems discussed at the 2008 Rare Books and Manuscripts Section Preconference. As Dooley notes, the digital age has had a profound effect upon nearly every aspect of special collections; user services, bibliographic control, availability of resources, collecting patterns, preservation, and other areas have all been impacted by a society that is becoming increasingly digital with each day that passes. More and more, users want free, unrestricted, and often remote access to materials – a service that sounds good on paper, but is not so easy to provide in practice, as materials are fragile, brittle, and not necessarily amenable to mass scanning or digitization. Nevertheless, despite these challenges, special collections professionals must attempt to stay one step ahead of the game, and must be willing to make the changes necessary to thrust themselves and their collections into the 21st century. To this end, Dooley’s article provides a list of ten “gentle commandments” for the present and future special collections librarian, a list of ten principles that she hopes will guide special collections into the open, freely accessible world of born-digital materials.

Though all ten of Dooley’s principles are certainly worth mentioning, there are three in particular which seem to stand out more than the others, perhaps because they discuss some of the more problematic issues regarding digitization of special collections. Dooley’s third principle (“Digitize with abandon”) calls for what she terms “wholesale digitization”: large-scale, mass digitization projects that aim to serve large groups of users. The reasoning behind this change in special collections digitization is sound; as Dooley comments, “The notion of carefully selected and interpreted ‘boutique projects’ has rather precipitously fallen out of fashion. This is because we have realized that many of our users have no desire for us to serve as content filters …” (53). Have special collections repositories viewed digitization of their collections as mere vanity projects, designed only to serve as attention-grabbers for casual library users? Dooley implies that this might be so, and in order to fully serve library users, scholars, and researchers, special collections libraries should focus more on digitizing everything – not just the things that seem the most interesting, the most rare, or the most valuable. In Dooley’s view, it should be left up to the user to apply those particular superlatives in the ways that they deem fit.

Dooley’s seventh and eighth principles (“Be promiscuous with your metadata” and “Collaborate, collaborate, collaborate,” respectively) call for further changes in additional technological areas, namely access to information about available collections. In the metadata section, Dooley warns, “… the nature of metadata – in terms of both what our
users want and what we can reasonably afford to produce – is undergoing a sea change that we reject at our peril” (56). Essentially, creating metadata for special collections is not the only step; once it is created, special collections librarians must find a way for the metadata to become searchable, discoverable, even “Googleable,” in an effort to make the information freely available to our users. One of the best and most beneficial ways to attempt this transition, Dooley argues, is to initiate collaboration with scholars and researchers who use special collections: “Whether in a campus environment or a specialized research library, we … must actively collaborate with scholars in the development of digital tools, resources, and discovery systems … Together we can build large scholarly information environments to aggregate our growing universe of scholarly digital assets” (57).

Overall, Dooley’s list of “commandments” for the current and future special collections professional reminds the reader that special collections do not have to remain the dark, musty storehouses of yesteryear, and that the dawn of the digital age does not mean that special collections are now irrelevant. Essentially, archives and special collections can remain consistently relevant in the information world if their librarians and leaders are willing to rely on innovation, collaboration, and digitization.


Many library professionals and researchers alike would agree that it is somewhat difficult to envision the future of special collections. When confronted with the idea of the “21st-century special collections library,” countless questions emerge: What will tangible objects mean to us in the years to come? Will students, teachers, and scholars eventually come to rely completely upon digital materials? The advent of mass digitization and the immediacy of information have completely changed the learning landscape: how will special collections fit into this world? Based on the current literature, it is clear that no one knows the definitive answers to these questions; with all the current changes in information science, technology, and distance learning, and library services, it’s hard to say just how special collections will be viewed in the years to come.

However, that doesn’t necessarily mean that library professionals are unable to consider how people might adapt to fit into the 21st-century special collections world. Though we can’t say for certain how materials may or may not be used in the coming years, how objects might be arranged, or what percentage might be available digitally, we can consider what we know about current special collections and use that knowledge to develop strong, competitive educational programs for future special collections professionals.

In this article, Landis supports the notion of revamping educational programs for special collections librarians, commenting that the professional standards and core competencies defined by those programs will play an invaluable role in shaping the future of special collections. Landis notes, “… [W]e need to keep the education of new special collections professionals grounded in the current realities of a wide variety of institutions, while at
the same time articulating a vision of the kinds of expertise and leadership needed to ensure a broad spectrum of vibrant, engaged, relevant, and busy academic special collections repositories in 2020, or 2050” (41).

Further in the article, Landis goes on to assert that currently, education for special collections professions is “spotty and idiosyncratic at best” (47). This is a devastating notion for the special collections world: if education is mandatory for special collections professionals, yet the quality of that education is lacking, what does that mean for the future of the special collections profession? As Landis argues, “… the work of delineating core competencies for special collections professionals is important, especially in a time when the role and configurations of many academic special collections may be changing” (48). Perhaps in order to truly prepare special collections repositories for the 21st-century (and beyond), professionals should be open to change, starting with drastic change in the nature of special collections education.


Akin to the ALA Code of Ethics, the ACRL Code of Ethics for Special Collections Librarians sets forth particular rules, regulations, and core values that apply specifically to special collections professionals and the challenges they face.

One of the most prominent ethical dilemmas faced by special collections librarians is described at the very beginning of the document. The preamble speaks about access versus security, stating: “[S]pecial collections librarians have extraordinary responsibilities and opportunities associated with the care of cultural property, the preservation of original artifacts, and the support of scholarship based on primary research materials. At times their commitment to free access to information may conflict with their mission to protect and preserve the objects in their care” (1). Certainly, this challenge can prove daunting at times; librarians are charged with providing free access to all, yet it is sometimes difficult to place necessary restrictions upon researchers who wish to peruse and consult valuable materials. This seems to be a perennial problem of special collections librarianship – finding the proper balance between being too open and too restrictive.

To assist the special collections librarian in understanding how to approach dilemmas and problems such as these, ARCL has created a concise list of seven ethical principles that apply particularly to special collections. Roughly interpreted, the code of ethics calls for librarians to remain loyally committed to their institution; this means that they should not compete with their library in terms of personal collecting, nor should they accept gifts, loans, or any outside monetary offers from dealers, sellers, or other entities. Librarians should never perform appraisals or engage in any dealing practices. Special collections librarians should also consider all of their outside professional activities (teaching, chairing committees, etc.) to be representative of their home institution, and should serve the library honorably even when they are not inside the building. In addition, special
collections librarians must act according to legality: they must not withhold information about the library’s holdings in order to further their own research and must strive to protect the confidentiality of researchers and materials according to library policies. As the document notes in closing, “To remain vital, these principles of conduct must be integrated into the life of the profession” (3).

All special collections librarians should understand these principles and commit them to memory in order to ensure the structure and credibility of special collections repositories. These ethical parameters are aimed at helping special collections professionals understand their role in the overall mission of their institution. Without them, it might be difficult to deal with day-to-day issues that arise in a typical special collections library.


In 2005, the Rare Books and Manuscripts Section (RBMS) of ACRL/ALA appointed a task force to examine the area of special collections librarianship. This task force was asked to create a list of core competencies for special collections librarians, which would be recommended for formal adoption by ACRL. Acknowledging that the special collections profession is an expansive, constantly evolving field, the task force produced this document, which is intended to serve “as a guide to career-long learning” while providing some basic professional guidelines for the special collections librarian of the future.

To support this notion of continued learning, section II of the document (“Fundamental competencies”) begins by stressing the importance of flexibility within the special collections profession: “… today’s special collections environments are increasingly diverse. They vary significantly with regard to institutional setting, nature of collections, scope of functions and services, and audience. A special collections professional may experience much of this variety over the course of his or her career” (624). Although there are a number of common issues and problems experienced in nearly every special collections repository, each particular environment is essentially very different; to prepare fully for this diversity, special collections professionals should be flexible and willing to adapt to new situations.

Additionally, as the document goes on to explain, special collections professionals should be expected to meet a number of fundamental standards. In the most basic sense, they should understand the purpose of special collections, the types of materials collected, and the significance in collecting and maintaining original artifacts for research and teaching purposes. To support this understanding, special collections professionals should cultivate a working knowledge of liberal arts, history, and culture, and should be familiar with at least one foreign language particularly related to the collections of their repository (624). In a broader sense, special collections professionals are expected to meet the same criteria as librarians and information professionals in other fields; namely, special collections professionals are expected to be familiar with the standards, ethics, and best practices of their field, and are encouraged to be committed to ongoing learning and
professional development. Technology is also an important aspect of special collections work; as more and more collections are digitized and made accessible to wider audiences, special collections professionals must keep up with technological advancements and the possible changes they might bring to the field.

Section III of the document deals with more specialized competencies (collection development, management/administration, preservation, etc.) that are likely to be dependent on the position held. The reason for including these specialized competencies is clear: “Many special collections professionals have multiple responsibilities that require proficiency in several areas of practice, while others specialize in a single, focused area. The level of proficiency required will vary accordingly to the particular position, the institutional setting, and the career path of the professional” (625). In essence, these specialized standards all relate back to the core competencies mentioned at the beginning of the article, as the core competencies form a basis for all future specialization within the profession.

Perhaps the most interesting aspect of this document is the disclaimer tacked on to the end of the introduction on page 624. It reads, “While this document does not assume that an LIS degree is required for appointment at the professional level, it recognizes the important role played by library schools in creating a set of shared values that link special collections staff to each other and to their library colleagues.” Rippley (2005) and Schreyer (2004) might beg to differ with this assertion; both of their articles[see pp. 52 and 53, respectively] highlight the importance of formal library school education and the ultimately beneficial impact it can have on special collections as a whole. Yet, this official document, approved by the ACRL Board of Directors in 2008, implies a wishy-washy stance on the issue. Granted, the authors of the RBMS list of core competencies may have included this disclaimer as a means of covering all aspects of the professional landscape; after all, it is true that not every single one of today’s special collections professionals possesses an MLS degree. Nevertheless, as this document is intended to serve as a set of guidelines for professional expectations of special collections professionals, it should mention more about the level of education desired for professionals within the special collections world.


Taking a page from Cloonan and Berger (2003), Landis (2006), and Schreyer (2006), [see pp. 47, 49, and 53, respectively] Ripple’s article serves as another analysis of the current education climate for special collections professionals. Unlike the aforementioned works, however, Ripple approaches the profession not as a seasoned special collections professional, but as an early-career librarian: in her own words, “an archives-trained, library-degree-holding, beginning academic librarian” (86). Surveying the special collections world in this way allows Ripple to assess how her own recent education as impacted her career path into special collections, while also allowing her to discuss the future of the profession as a whole.
Supporting Cloonan and Berger’s (2003) previous assessment that digital preservation would become a facet of special collections librarianship in need of lasting professional development, Rippley observes that special collections librarians’ “increasing work with digital material, both ‘born digital’ and that created from paper collections” has, in fact, forced members of the profession to continue their own technological education. However, digitization of special collections materials has of late also forced special collections librarians to bone-up on their knowledge of copyright restrictions and intellectual property law – issues that, years ago, probably seemed totally unrelated to special collections. Unfortunately, many Library Science education programs only provide a cursory overview of these topics; nevertheless, as Rippley comments, “[S]pecial collections librarians will need a thorough understanding of the legalities surrounding image permissions, copyright, and intellectual property, as well as the ability to communicate with lawyers so that our collections are better served and protected by decisions made regarding intellectual property” (83).

Rippley also attests to Schreyer’s 2004 claim that the lack of formal special collections education and the shockingly low number of entry-level positions in special collections creates a strange professional landscape that few newcomers can successfully enter. Rippley comments, “… library directors are reporting problems in filling positions with qualified candidates, particularly for senior positions, whereas librarians in the early stages of their careers are finding it difficult to enter the position … This crisis will only grow more severe in years to come” (84). This commonly cited observation begs the question: what factors cause this terrible discrepancy to occur? Certainly there is no shortage of fresh, new librarians yearning to become special collections professionals; why are there no positions for them? Rippley implies that education (or lack thereof) might be to blame, an assertion which, based on other literature about this subject, does not seem unreasonable.

Considering Rippley’s arguments and insights, it is clear that the current state of special collections education is pretty grim. Beyond the University of Virginia’s Rare Book School and the odd Rare Book History or Archival Education library school course, there exists no formal program of standard education for aspiring special collections librarians. Evidenced by the number of articles in this bibliography devoted to other issues – reference, instruction, research, etc. – there are countless standards of special collections librarianship that are in need of consideration and revision. However, perhaps special collections professionals should take a step back and consider their own education and the education of future librarians before attempting to address these other aspects of the profession.


Schreyer’s article addresses the fundamental question of special collections librarianship posed by countless researchers and professionals [see Landis (2006), p. 49; Yakel (2004), p. 35; and Rippley (2005), p. 52]: what particular credentials, professional skills, and levels of experience do special collections professionals need to have in order to be
successful librarians? Certainly all librarians should be prepared to meet particular competency standards over the course of their professional careers, but are there separate competencies that apply only to special collections librarians? In 2003, the author and a group of special collections professionals from across the country formed a Special Collections Task Force in order to “… assess the environment for education and training of special collections librarians” (51). During the meeting, the group discussed what kinds of skills and competencies would be desirable in potential special collections professionals and questioned how education and training programs might prepare those individuals for future special collections librarianship.

After creating a list of “generic” skills – competencies that should be met by all research librarians (e.g., assessment, creativity and innovation, teaching and writing skills, etc.), the Task Force developed a more detailed list of competencies that could be considered unique to special collections positions: intellectual curiosity that extends to deep interest in the ‘stuff;’ language skills; basic knowledge of conservation principles; familiarity with pertinent legal and ethical issues; processing skills; willingness to accept the responsibility that artifacts impose; and appreciation of the role of special collections in scholarship and teaching (51). Essentially, the group realized that their list of specialized competencies suggested that professional development and/or library school programs are necessary for proper training of special collections professionals at all levels.

This realization is striking, particularly when compared to the RBMS competencies previously discussed [see RBMS core competencies, p. 51]. In the RBMS document, the authors state that they do not assume an LIS degree is absolutely required for special collections professionals, but do recognize the need for library schools in creating a shared sense of professionalism and collegiality. A curious contradiction can be seen here: no wonder so much of the literature from the special collections field seems to lament the woeful state of education and training programs for special collections librarians [see Landis (2006), p.49 and Rippley (2005), p. 52]; it seems that no one within the profession can properly agree on the level of training necessary for special collections professionals. As Schreyer’s article illuminates, perhaps it is truly time to determine the standards of education for special collections professionals, particularly as the profession heads further and further into the digital age.
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