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This paper provides an analysis of the remote reference correspondence of the Southern Historical Collection and General and Literary Manuscripts (SHC) at the University of North Carolina at Chapel Hill, to observe the effects of providing online holdings information and the use of e-mail in reference correspondence. The study examines 595 letter, phone, fascimile, and e-mail correspondence units sent to the SHC in 1995 and 1999. Correspondence units are analyzed to determine the types of research performed, types of questions asked, and the responses of the Southern Historical Collection.

The study finds that the amount of remote correspondence increased dramatically between the two selected years, with e-mail becoming the preferred method of inquiry. In 1999, more questions came from casual users researching for personal reasons and more users took advantage of online holdings information to shape their reference questions than in 1995. The proportion of remote users visiting the SHC in person decreased between the two years, suggesting that more users now expect to perform research without visiting the collection. Archivists must be prepared to accept new influxes of remote researchers and to find methods to improve remote reference services.

Headings:

Use studies -- Manuscripts

Electronic mail systems

Archives -- Reference services

ANALYSIS OF REMOTE REFERENCE CORRESPONDENCE
AT A LARGE ACADEMIC MANUSCRIPTS COLLECTION

by
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Introduction

The emergence of the Internet during the 1980s and its growth and acceptance by the American public during the 1990s have created a period of transition for libraries and archives. Archivists actively have been looking for ways to improve the use of their materials since the Society of American Archivists established the Task Force on Archives and Society in the late 1980s. The mission of the task force was to educate the public about the importance of archives and to promote their use and importance in everyday life.¹ Since that time, archivists have taken a greater interest in discovering ways that they can better serve their users. As the amount of information has increased, there has been a shift toward trying to provide access through documentation rather than access through the subject knowledge of a curator or archivist. A single person can no longer function as the sole access point and memory of a collection, so archivists have attempted to standardize access methods with finding aids and catalog records. New communications technologies have given archivists the opportunity to reach an even broader audience. Library catalogs and national utility databases such as OCLC and RLIN, all of which contain catalog records of archival materials as well as of books, have utilized new technology by making holdings information available online, first through a

¹ William J. Maher, "The Use of User Studies," *The Midwestern Archivist*, 9 no.1 (1986): 15.

command driven interface and then through the World Wide Web. Archivists have also mounted finding aids of their collections on the Web separately from online catalogs, and now are encoding these finding aids in the hopes of making them more easily searchable. The Internet and the World Wide Web have naturally been touted as an excellent way for archivists to reach out to new users and to provide better service to current users.

Besides increasing holdings information available remotely through the Internet, libraries and archives have begun to provide reference service through electronic mail. E-mail provides a way of extending public service to the virtual community. Archivists have long provided remote reference service to researchers from around the world who wrote to archives in order to tap into their unique holdings. But now, with holdings information and the potential answers to reference questions only a click away, the whole concept of “remote” becomes much closer. This study examines the remote reference correspondence of a large manuscripts repository, the Southern Historical Collection, in the Manuscripts Department at the University of North Carolina at Chapel Hill (UNC), to discover how the Internet revolution has changed the types of users and questions asked.

The Southern Historical Collection was chosen as the manuscripts repository for this case study for two main reasons. First, it has been on the forefront of Internet technology. The Manuscripts Department had an Internet presence first as a gopher site and then moved to the World Wide Web in the spring of 1995. That May, the Manuscripts Department created a departmental e-mail address for reference correspondence and advertised it on the Web. Almost all of the nearly 4,600 collections within the Southern Historical Collection have records in the UNC online catalog, which were phased into the system in the summer of 1997. Descriptions of around 4,000

collections are available on the website of the Manuscripts Department, and the number is growing daily.² Approximately 1,500 of these descriptions give detailed information, and the rest provide overviews.

The second reason the collection was chosen is its high rate of use. The Southern Historical Collection is a very well known, established collection, especially for those studying Southern history. The collection has existed since 1930, with a collecting region that includes the entire South. Newer divisions in the Manuscripts Department include the General and Literary Manuscripts, the University Archives, and the Southern Folklife Collection. This study focuses on the use of the Southern Historical Collection and General and Literary Manuscripts (abbreviated as the Southern Historical Collection, or SHC), though the other divisions share the same general departmental e-mail address. For the fiscal year 1998-1999, the department received 2,476 daily registrants and 1,592 phone calls, facsimiles, letters, and e-mail inquiries.³

As the use of e-mail and the Internet have increased, there are many questions to consider about their effects on the use of archives. Does e-mail correspondence differ from traditional reference correspondence? If so, in what ways? How has the availability of holdings information online affected the types of correspondence that archives receive? This study examines the remote reference correspondence of the

² The website for the Manuscripts Department at UNC is <http://www.lib.unc.edu/mss>.

³ Manuscripts Department, University of North Carolina at Chapel Hill, *Annual Report, 1998-1999* (Chapel Hill: University of North Carolina, 1999), online, available: <http://www.lib.unc.edu/mss/anrep9899.htm>, 14 April 2000.

Southern Historical Collection in 1995 and 1999 to test the following hypotheses about possible changes generated by e-mail correspondence and the Internet:

1. E-mail is becoming the dominant method for remote reference correspondence.
2. Users who contact archives through e-mail are more likely than other users to be people surfing the web recreationally and less likely to be serious researchers.
3. The types of questions asked by users have become more specific as more holdings information has become available through online catalogs and webpages.
4. The Internet has encouraged a larger variety of users to learn about and contact archives.

Archivists need to prepare for the future and anticipate how technology will change the use of archival materials. This study, by examining the remote users of the Southern Historical Collection, helps archivists understand changes produced by the Internet and e-mail reference correspondence. The two years chosen for analysis represent two different stages in the development of Internet resources and provide data by which to judge the effects of the Internet on remote correspondence. In addition to testing the above hypotheses, this study provides a profile of the remote users of the Southern Historical Collection, and explores the types of questions asked by remote users of archives and the responses provided by the archive. Using the results of this study, other institutions will be able to plan more efficient policies for providing reference and outreach services to their own users.

Literature Review

Studies of the Users of Archives

Archives have traditionally focused on materials, not users, so there is considerably more written about the processing, arrangement, and description of archival materials than there is about the people who use those materials. According to Susan Malbin, there are two distinct schools of thought about archival reference services.⁴ The older one is the materials-centered approach, which favors strict provenance for organization. This theory holds that users should be educated to adapt to organization by provenance, rather than expect an archive to be arranged like a library. The second school of thought is the user-centered approach, which argues that access tools should be user-friendly, providing subject access and allowing the extraction of small bits of information. This is similar to a typical library arrangement. As the user-centered approach grew in popularity, particularly in the United States, archivists realized the need for user studies. Several articles were written during the mid-1980s to encourage such research. In his article “Facts and Frameworks: An Approach to Studying the Users of Archives,” Paul Conway outlines three different factors that an archivist can study:

⁴ Susan L. Malbin, “The Reference Interview in Archival Literature,” *College and Research Libraries*, 58 (January 1997): 69-80.

users, information needs, and the use of materials.⁵ Three core questions archivists should ask are “How good are the services?”, “How good is the protection of archival information?”, and “What good do the services do?” Similarly, William J. Maher, in “The Use of User Studies,” promotes the value of studying users of archival materials.⁶ Users, according to Maher, are the core of the archivist’s mission and no archivist should be in the dark about the needs, wants, and characteristics of its user population. To aid in their understanding, archivists should explore how users find out about archival materials, evaluate whether the archive meets researchers’ information needs, and determine the best methods for access. Like Conway, Maher believes that data collection should be a constant and ongoing process. Unfortunately, this often is not the case, but substantial information on users can be obtained by going through already existing documentation, such as research agreements and correspondence files.

In succinct terms, Bruce Dearstyne notes that the “goal of archival work is to identify and preserve information that is put to *use* by people for some deliberate purpose” (*italics in original*)⁷ Arrangement and preservation of materials are not goals of their own right, but rather support the goal of providing information to those who seek it. Dearstyne suggests six areas for further analysis, including the tracking of research use and the need to expand notions of reference and public service. Likewise, Elsie T. Freeman and William L. Joyce, in separate articles, discuss the importance of

⁵ Paul Conway, “Facts and Frameworks: An Approach to Studying the Users of Archives,” *American Archivist*, 49 (fall 1986): 393-407.

⁶ William J. Maher, “The Use of User Studies,” *The Midwest Archivist*, 9 no.1 (1986): 15-26.

⁷ Bruce W. Dearstyne, “What is the *Use* of Archives? A Challenge for the Profession,” *American Archivist*, 50 (winter 1987): 77.

understanding archival users in order to provide better service.⁸ Freeman discloses four common but incorrect assumptions: archives are oriented toward users, archivists know who their users are, archivists understand how research is done, and archivists provide adequate research assistance. To improve reference services, archivists must admit their ignorance and drop these assumptions, beginning by exploring who their users are and how they use the archive. Joyce focuses on the inadequacies of current finding aids in addressing new research areas, such as social research, and believes that analyzing the research process will help archivists design more useful access tools.

Despite these calls to task, published use studies are quite limited. The most commonly studied users have been historians, although, as Freeman states, historians are neither the principal nor the most significant archival users.⁹ Yet historians do comprise an important segment of the archival user population due to their reliance on primary source materials for research. Several excellent studies describe the information needs of historians in detail, though they are not specific to archives.¹⁰ Frederick Miller performed a comprehensive citation study of the use of archival materials by social historians. He reports that historians cited an average of 4.3 series an article, though quantitative literature tended to cite archival materials less frequently. He concludes that social historians are dependent on archives for their research, but they tend to reinterpret

⁸ Elsie T. Freeman, "In the Eye of the Beholder: Archives Administration from the User's Point of View," *American Archivist*, 47 (spring 1984): 113; William L. Joyce, "Archivists and Reference Use," *American Archivist*, 47 (spring 1984): 124-133.

⁹ Freeman, "In the Eye of the Beholder," 116.

¹⁰ Helen R. Tibbo, *Abstracting, Information Retrieval, and the Humanities: Providing Access to Historical Literature* (Chicago: American Library Association, 1993); Donald Owen Case, "The Collection and Use of Information by Some American Historians: A Study of Motives and Methods," *Library Quarterly*, 61 (January 1991): 61-82; Margaret F. Steig, "The Information Needs of Historians," *College and Research Libraries*, 42 (November 1981): 549-560.

existing holdings, searching for new meanings in old records. For this type of research, arrangement by provenance is less useful than providing good subject access.¹¹

Other studies focus on a particular institution instead of particular users. The largest of such studies is Paul Conway's survey of the users of the National Archives, described in his book, *Partners in Research*.¹² Conway performed his study as a way of testing the assumption that building staff expertise in specialized areas is the best way to provide access to researchers. Conway questioned this method, which characterized what he called the "gatekeeper" approach to archives: the user must first go through the archivist in order to access either the tools that describe the records or the actual records.¹³ Conway interviewed hundreds of researchers at different reading rooms in the National Archives and analyzed both phone transactions and letter correspondence. He discovered a wide range of reasons why people use the National Archives. The largest category of researchers consisted of people researching for personal reasons, with genealogy being the most popular research activity. Approximately one third of the researchers were new to or had minimal experience with the National Archives.¹⁴ With his results, he recommends a "partnership" approach to providing access, in which the user can access the tools (such as finding aids and catalog records) but still benefit from the mediation of an archivist.¹⁵ Such an approach requires better documentation by archivists in finding aids and inventories of collections and places less emphasis on

¹¹ Frederick Miller, "Use, Appraisal and Research: A Case Study of Social Historians," *American Archivist*, 49 (fall 1986): 371-392.

¹² Paul Conway, *Partners in Research: Improving Access to the Nation's Archive* (Pittsburgh: Archives & Museum Informatics, 1994).

¹³ *Ibid.*, 53.

¹⁴ *Ibid.*, 64-65, 70.

¹⁵ *Ibid.*, 83.

individual archivists' subject expertise. Conway's partnership approach to access supports the provision of holdings information on the Internet, which allows users to access the tools directly.

In a citation study of medical records, Nancy McCall and Lisa A. Mix followed the documentation of the Alan Mason Chesney Medical Archives in the literature of numerous disciplines.¹⁶ They discovered that archival documentation in health-related fields was used by numerous professions outside of health sciences, as well as to advance knowledge within health sciences. They believe that enhanced descriptions of holdings and electronic access to holdings information and to the records themselves would help to broaden the pool of researchers further. In another study, Jacqueline Goggin performed an analysis of the use of collections pertaining to African-Americans' and women's organizational records housed at the Library of Congress Manuscripts Division.¹⁷ Her study examined the books published by users to determine if the information in the archives was being used to the fullest extent possible. She found that print sources were relied upon more heavily than archival materials, and that the historians tended to overlook portions of the collections that held relevant information. Though her conclusions first suggested that this was the fault of the historians for "just plain laziness," though she does concede that another possibility could be that archival materials are not as accessible as archivists would like to believe, due to the sheer volume of twentieth-century records, insufficient information provided by finding aids, or

¹⁶ Nancy McCall and Lisa A. Mix, "Scholarly Returns: Patterns of Research in a Medical Archives," *Archivaria*, 41 (1996): 159-187.

¹⁷ Jacqueline Goggin, "The Indirect Approach: A Study of Scholarly Users of Black and Women's Organizational Records in the Library of Congress Manuscripts Division," *The Midwestern Archivist*, 9 no.1 (1986): 57-67.

insufficient training in the use of archival materials.¹⁸

From these results, one might infer that better finding aids will lead to better access, though Maher notes that this is an unexplored assumption. In a study of reference letters written to the University Archives at the University of Illinois at Urbana-Champaign, he discovered that referral and provenance were the most likely reasons that users wrote to the archives, while the use of printed guides was relatively low. Most of the correspondents in his study were professionals or academics, not genealogists.¹⁹ Similarly, Megan Philips uncovered that researchers using the Manuscripts Department at UNC more frequently discovered holdings information by word-of-mouth or through an instructor than from printed guides.²⁰ Conway, too, found in his research that users of the National Archives tended to find out about the collections in a word-of-mouth fashion.²¹ These studies do not necessarily indicate that finding aids and guides do not aid in access to the collections or increase the use of materials, but rather demonstrate that they are not the most important way that users first learn about the archives. They also point to the importance of reference services in helping users who may not be familiar with printed or online access tools to locate information in the archives.

¹⁸ Ibid., 62.

¹⁹ Maher, "The Use of User Studies," 20-21.

²⁰ Megan Philips, "Usage Patterns for Holdings Information Sources at the University of North Carolina at Chapel Hill Manuscripts Department" (master's thesis, University of North Carolina at Chapel Hill, 1997).

²¹ Conway, *Partners in Research*, 66-67.

Archives and the Internet

Unfortunately, many of the user studies pertaining to archives were completed before archival holdings information was available online in any quantity. Archivists may have first viewed the Internet and the World Wide Web with some trepidation, but have since tried to embrace the Internet as a tool to increase visibility and use. According to Barbara Craig, the Internet provides archivists with a medium to promote the function of archives as the memory keepers of society and with a method to reach users remotely.²² Archivists have no choice but to keep up with technology and promote archives on the Internet, or they will be left behind as the caretakers of an obsolete institution. At the same time, Craig reminds readers to be skeptical that computer technology will become an all-encompassing solution to issues pertaining to archives. The needs and wants of users must be considered when choosing services for the future. Dearstyne believes that the Internet provides a new path for encouraging the use of archival materials. The Internet can reach new users and educate them through online exhibits and descriptions of collections, providing potential users with a sense of archives' missions. The placement of access tools online, such as finding aids, will help both experienced and new users and encourage the use of collections.²³

To date, studies examining the effects of online use have not revealed profound differences in the types of users or in the way that users access archives. Conway, when studying the users of the National Archives, surveyed them on their computer skills. His

²² Barbara L. Craig, "Old Myths in New Clothes: Expectations of Archives Users," *Archivaria*, 45 (spring 1998): 118-126.

²³ Bruce W. Dearstyne, "Archival Reference and Outreach: Toward a New Paradigm," *The Reference Librarian*, 56 (1997): 185-202.

research, done between 1990 and 1991, was a way to test whether automation of the catalog would be useful for users. He found that more than two thirds of users worked with computers at home or at jobs, and about half of users performed regular searches with an online catalog or database.²⁴ From these results, Conway did recommend automation. Yet in Philip's 1997 study, less than fifteen percent of researchers reported that they found out about the Manuscripts Department through the online catalog (which contained catalog records for the manuscripts collections) and less than ten percent discovered the department through the World Wide Web (which contained selected finding aids as well as a description of the Manuscripts Department).²⁵ These researchers, most of whom were associated with an academic institution and half of whom were students, may have been more likely than Conway's user group to rely on professors and peers to discover information about the Manuscripts Department, and thus less likely to explore the World Wide Web or the online catalog. Similarly, Lisa Odum, who surveyed art historians, found only one of twenty-one historians to have discovered information about the archive that they had last visited in person through the Internet.²⁶ The low rates of use of the Internet to discover information about archives may mean that researchers do not use the Internet as an initial information source, but do not prove that online holdings information is an unimportant source for researchers. It could also be that the Internet was still too new a resource for many researchers, accustomed to other methods of discovery, to take advantage of as a source for archival information. Even in

²⁴ Conway, *Partners in Research*, 77-78.

²⁵ Philips, *Usage Patterns for Holdings Information*, 25-30.

²⁶ Lisa Odum, "The Use of Archival Materials by Art Historians" (master's thesis, University of North Carolina at Chapel Hill, 1998).

1997, few repositories had holdings information available through the Web, so researchers would not necessarily have thought to search for the few archives which did provide information online.

A study by Kathleen Feeney tested whether finding aids at the Southern Historical Collection at the University of North Carolina at Chapel Hill are retrieved by the major commercial search engines, specifically AltaVista and HotBot.²⁷ In her searches on subject heading, only 46 of 150 searches brought up finding aids in the first one hundred records. Searches on personal names in the collection provided no more success. Feeney hypothesizes that the reasons for the low retrieval rates are the huge data sets that the search engines returned and the possibility that the search engines did not index all of the finding aids. She concludes that online finding aids do not aid in resource discovery if a user searches through a commercial search engine. Bibliographic utilities and library catalogs are still the most useful methods of retrieving information about archival collections, at least pending the creation of an online clearinghouse of archival finding aids. Currently, the value of having finding aids on the Web is not in drawing new users to archives through general Internet searches, but rather in providing information remotely to users who already know about an archive's website or manage to stumble across it by accident.

The increasing popularity of the Internet and the World Wide Web may change the nature of reference services and the types of users of archival material. Already many archives are providing services over the Internet, including electronic reference and

²⁷ Kathleen Feeney, "Retrieval of Archival Finding Aids Using World-Wide-Web Search Engines," *American Archivist*, 62 (fall 1999): 206-228.

online exhibits. For example, the New York State Archives and Records Administration uses an e-mail reference service that filters questions so that ready-reference questions can be answered quickly.²⁸ James Edward Cross suggests that using the Internet as a means of providing reference services (such as through electronic mail) may lead to more non-traditional users, and may make users more impatient and less willing to learn how to retrieve materials.²⁹ Malbin cautions that while new technology can be beneficial, the need for reference work will increase, not decrease, as users struggle to master new technologies and searching techniques.³⁰ Besides a possible influx of novice users, even more experienced users may not understand online access tools such as MARC records and online finding aids, while the increased use of e-mail could swamp archives with reference questions.

Correspondence through Electronic Mail

In the effort to reach more users and to reach users remotely, archives and libraries have extended their reference capabilities to include e-mail correspondence. E-mail as a medium of communication has its own distinctive characteristics. It is a quick and efficient method of exchanging written information. Unlike phone calls or face-to-face communication, e-mail does not provide any aural or visual feedback. Because it is a young method of communication, there are no agreed upon rules of etiquette. Additionally, there are few status or position cues and no regulatory feedback,

²⁸ Thomas J. Ruller, "Open All Night: Using the Internet to Improve Access to Archives," *The Reference Librarian*, 56 (1997): 161-170.

²⁹ James Edward Cross, "Archival Reference: State of the Art," *The Reference Librarian*, 56 (1997): 5-25.

³⁰ Malbin, "The Reference Interview in Archival Literature," 73.

compared to traditional letter correspondence, which can be slow and stilted due to the necessary delays in mail delivery. To help create a friendly responsive environment, Tibbo suggests that archivists send a prompt message of response to notify users that their e-mail was received (this can even be automated), and then clarify the question through one or more rounds of open-ended questioning. A follow-up letter will make the user feel welcome and will encourage him or her to use the service again. Finally, the archive can take advantage of information gained over e-mail by creating a file for each client. This file can contain contact information and allows archivists to review previous exchanges in order to improve future reference service. It also facilitates evaluation of staff work and allows for the easy compilation of use statistics.

Eileen G. Abels, interested in the concept of the e-mail reference interview, performed a study at the University of Maryland where student intermediaries worked with clients to answer real reference questions.³⁵ She found several weaknesses in using e-mail as the medium for a reference interview and noticed that certain approaches toward the interview were less than ideal. With a piecemeal approach, responses were not well-planned, goals and directions in the messages were not clear, and important pieces of information were forgotten or overlooked. Students would also follow what Abels termed the “bombardment” approach: the first reply to a reference question was a stream of many questions in no particular order. Responses by clients tended to be incomplete and this too caused information to be lost. Students would occasionally make assumptions when the time lag between e-mails grew too great, but these assumptions would not necessarily be correct. The most effective approach was a systematic method

³⁵ Eileen G. Abels, “The E-mail Reference Interview,” *Reference Quarterly*, 35 (spring 1996): 345-58.

in which students returned questions regarding the initial reference question in an organized manner similar to a form. In fact, Abels created a form based on the systematic approach. The form contained three sections: one on personal data, one on the subject in question, and one on the type of information the client wanted and the time frame in which the client was working. This form decreased the number of exchanges by allowing the basic information to be gathered in the first exchange. Abels concludes that broad requests that require extensive negotiation are better handled in real time than negotiated via e-mail. Roysdon and Elliot also concur that question negotiation though e-mail is slow and frustrating, though both evaluations compare e-mail to personal interaction rather than letter correspondence.³⁶

To date, there have been no studies concerning e-mail reference service in archives but researchers have conducted many studies on the use of e-mail reference service in libraries. Lara Bushallow-Wilbur and others evaluated the queries of three reference e-mail lists at the State University of New York at Buffalo, from January 1993 to June 1994.³⁷ They discovered that three-fourths of the questions could be answered using standard reference tools. Surprisingly that most of the questions were asked during regular business hours. Additionally, the majority of questions were sent from computers on campus. They sent a follow-up survey to those patrons who had submitted questions and found that patrons enjoyed using e-mail for its convenience and immediacy, even though they did not take advantage of the extended hours and off-campus availability that e-mail correspondence provides.

³⁶ Roysdon and Elliott, "Electronic Integration of Library Services," 89.

³⁷ Lara Bushallow-Wilbur, Gemma DeVinney, and Fritz Whitcomb, "Electronic Mail Reference Service: A Study," *Reference Quarterly*, 35 (spring 1996): 359-371.

Despite fears of being overwhelmed by e-mail, librarians have reported that e-mail reference service has not been utilized as much as expected.³⁸ Diane L. Fishman suggests that use is lower than expected because users are not aware of the service. For libraries and archives to take advantage the potential effectiveness of e-mail, they must advertise their service.³⁹ A study at the Boston University Medical Center of their e-mail reference service noted that the users tended to ask ready-reference questions over e-mail but came to the library for more complex information needs.⁴⁰ Seventy-five percent of the questions asked through the e-mail reference service originated outside of the primary clientele of the library. These questions tended to be very broad and open-ended, with little accompanying contextual information, making them difficult to answer over e-mail. It is possible that these people were surfing the Internet, asking their question at any site that seemed appropriate. Ann Bristow studied the use of e-mail reference at Indiana University over a period of years and reported the results in two articles.⁴¹ Use of the reference service nearly tripled over three years, from 330 questions asked in a three month period in 1991 to 828 questions asked in a three month period in 1994. Staff members did not find e-mail reference to be a burden, as most questions were of a factual nature, nor was there an overwhelming volume of questions sent. The biggest challenge the library faced was that its interface moved from a closed system to a World Wide Web

³⁸ Julie Still and Frank Campbell, "Librarian in a Box: The Use of Electronic Mail for Reference," *Reference Services Review*, 21 no.1 (spring 1993): 15-18.

³⁹ Fishman, "Managing the Virtual Reference Desk," 4.

⁴⁰ Kathleen Schilling-Eccles and Joseph J. Hartzbecker, Jr., "The Use of Electronic Mail at the Reference Desk: Impact of a Computer Mediated Communication Technology on Librarian-Client Interviews," *Medical Reference Services Quarterly*, 17 no.4 (winter 1988): 17-27.

⁴¹ Ann Bristow, "Academic Reference Service Over Electronic Mail," *College and Research Library News*, 53 (November 1992): 631-632, 637; Ann Bristow and Mary Buechley, "Academic Reference Service Over E-mail: An Update," *College and Research Library News*, 56 (July/August 1995): 459-462.

location. This meant that, like the Boston University Medical Center, the university could receive questions from nonaffiliates. The Indiana University Library has tried to limit users by posting a notice on the webpage, explaining for whom the service is intended. Other librarians have shared the concern that opening a virtual reference desk on the World Wide Web could lead to a high volume of reference questions coming from outside the libraries' service areas.⁴²

The challenges and effects of e-mail reference service have not been completely realized as of this date in either libraries or in archives. E-mail use has increased rapidly in the past few years, and the library studies discussed here were all performed prior to 1997. It is possible that the libraries that reported low use rates for e-mail reference service have found use to have increased dramatically since that time or have found that users are taking more advantage of e-mail's flexibility. The effects of "opening up the door" by providing reference services over the Internet also have not yet fully been explored. This study hopes to shed some light on these questions, though continued research into the effects of the Internet and of e-mail reference correspondence will be required to understand this rapidly expanding and evolving technology.

⁴² Nancy O'Neill, "E-mail Reference Service in the Public Library: A Virtual Necessity," *Public Libraries*, 38 (September/October 1999): 305.

Methodology

This study examines the remote reference correspondence of the Southern Historical Collection from two different years so that differences over time can be examined. The first year selected to study is 1995, the first year that the Southern Historical Collection had a departmental e-mail address and a homepage on the Web. The second year chosen is 1999, the most recent year for which correspondence is currently available. The correspondence file is organized by year, and within each year the correspondence is organized alphabetically. All remote correspondence is located in this file, including correspondence by phone, fax, and e-mail. Staff at the Southern Historical Collection print out e-mail correspondence and place it into the file, and a create a log sheet for each phone call, which provides the date, name and location of the person calling, a description of the question, and an action record of the SHC's response. Staff members record their responses to letters, e-mail, and faxes either through shorthand notes written next to the correspondent's question or by placing an entire copy of the response in the correspondence file.

The reference correspondence is analyzed by unit. A unit is defined as one exchange between the researcher and the Southern Historical Collection or multiple exchanges with the same researcher on the same subject. For example, if a researcher wants to find information on several battles of the Civil War, and then later writes back that he or she wants more detailed information on one of the battles, that would count as

one unit with two exchanges. If the researcher writes again asking about plantation life, that would count as another unit. If the researcher asks about both the Civil War battles and plantation life in the same letter, however, that would only count as one unit, because single exchanges are not broken down into multiple units. A preliminary count of the correspondence for each year revealed that there were 803 units of correspondence in 1995 and 1,283 units in 1999. A systematic sample was taken of the correspondence for each year by examining every third correspondence unit, to achieve a total sample size of 695 units. This original count was later discovered to be erroneously large, as it did not identify the many units containing multiple exchanges. The actual sample consists of 366 usable correspondence units from 1999 and 229 usable units from 1995, for a total of 595 correspondence units. If the same correspondent was included in the data set more than once, one of the units was removed, to prevent a single correspondent from having undue weight in the analysis. This occurred only twice. Correspondence that was not of a reference nature was also removed. Once all the data was collected, it was coded and entered into SPSS. The data was then analyzed using Pearson's chi-square test for independent samples. Unless otherwise noted, findings that are called significant have a *p*-value of 0.05 or less using the chi-square test.

A pilot study of 45 correspondence units was performed to determine the type of information that could be collected. Based on that study as well as on relevant studies in the literature, a data collection sheet was composed (Appendix A). Though the correspondent name appears on the collection sheet, this item was used for reference purposes only and was later obliterated from the sheet. The first item collected was the date that the researcher sent an inquiry. If the unit consisted of more than one exchange,

the first date was recorded whereas if the correspondent did not indicate a date, the Southern Historical Collection's date of response was recorded as the date. This item was aggregated into four categories: January-June 1995, July-December 1995, January-June 1999, and July-December 1999.

The next item recorded was the location from which correspondent was inquiring, if known. The location of the correspondent was coded into categories following U.S. Census Divisions, with the exception that the state of North Carolina was given its own category and that the rest of the South was divided into the finer Census Subdivisions (Table 1).

Table 1: Categories of location

Division Name	Area covered
North Carolina	NC
South Atlantic	DC, DE, FL, GA, MD, SC, VA, WV,
East South Central	AL, KY, MS, TN
West South Central	AR, LA, OK, TX
Northeast	CT, MA, ME, NH, NJ, NY, PA, RI, VT
Midwest	IA, IL, IN, KS, MI, MN, MO, ND, NE, OH, SD, WI
West	AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY
International	All locations outside of the United States

The method of correspondence was divided into letter, phone, fax, or e-mail. The data was coded into the four categories of correspondence. If more than one correspondence method was used, both types were recorded, though the data was coded by the first type. A separate yes/no variable was created to indicate if the unit involved multiple methods of correspondence.

The correspondence was divided into four different research purposes, as outlined by Conway.⁴³ Conway identified users as occupational, personal, academic, and avocational. Occupational users, which this study terms professional users, perform narrowly defined research tasks for their jobs. Journalists, lawyers, and filmmakers commonly contact archives as part of their professional responsibilities. Personal users consult archives for narrow self-interested research, or simply out of curiosity. Genealogy is a common research topic. Academic users perform research of a wider scope, either as students or faculty members of an academic institution. Avocational users perform research with a broad scope but for their own personal interests. Compared with personal users, avocational users research in more depth and are more likely to have their findings published, although such research is not their primary occupation.

The type of request focused on the specific reason why the user contacted the Southern Historical Collection. The request type was placed into categories created from the results of the pilot study. The categories were then further refined and coded into mutually exclusive categories in SPSS. The types recorded were scholarly research, graduate student research, undergraduate student research, genealogical research, not research related, request for permission to publish, teaching, other, and unknown. After the data collection was completed, the request types were modified slightly. Teaching merged into a broader category that covered educational exhibits, programs, and documentaries. An additional category was created to cover professionals who wanted copies from the SHC's collections for their own libraries or archives.

⁴³ Conway, *Partners in Research*, 50-51.

The next item recorded on the analysis sheet was the object of inquiry. The categories for this section are modified versions of those Maher used in his study of the records correspondence at the University of Illinois Archives.⁴⁴ The researcher could request information on a subject, on a specific collection, on the specific item or items in a collection, or on specific items of unknown origin. The object of inquiry might also be for general holdings and policy information or might be unrelated to SHC holdings. Questions that asked about subjects or materials potentially at the SHC were not recorded as being unrelated to holdings, even if the SHC was unable to find any relevant materials. Categories for object of inquiry are not mutually exclusive, so each category was coded into its own yes/no variable. For example, a correspondent could request photocopies of a specific document and then also ask if the Southern Historical Collection carried any other materials on that subject. The object of inquiry for that unit includes both specific items and a general subject query.

The correspondence unit was evaluated to determine if it was an open question or closed question. An open question is not asked with any specific documents in mind and does not have a specific expected response. For example, “I’m looking for information about Civil War spies” is an open question, whereas “I would like a photocopy of a specific document on Civil War spies” is a closed question. Units that had questions that included both open and closed elements were coded as open questions.

⁴⁴ Maher, “The Use of User Studies,” 20-21.

The response of the Southern Historical Collection was also recorded, based upon the result of the pilot study and the categories used by Maher.⁴⁵ Responses were divided up into the following nonexclusive categories:

1. Provide reproductions or information about reproductions
2. Suggest microfilm available through interlibrary loan
3. Provide bibliographic information, such as an inventory or collection description
4. Provide narrative information about the contents of a collection
5. Suggest that the researcher visit in person or hire a private researcher
6. Provide general holdings and policy information
7. Provide permission to publish
8. Refer elsewhere, such as to another library or department
9. Unable to provide assistance
10. No response recorded
11. Request more information
12. Provide an acknowledgement or thank you
13. Other

In the case of a referral, a researcher could be referred outside of the Manuscripts Department or he or she could be referred to one of the other divisions within the department, namely the Southern Folklife Collection or the University Archives. Simple queries about these divisions were handled by staff members who worked with the Southern Historical Collection, but more complex questions were referred to a specialist. Each of the responses by the SHC was coded as its own yes/no variable in SPSS.

The formality of the request and background information provided by the correspondent was coded into three categories. Formal correspondence included three types of information: the specific information request, the purpose for which the correspondent needed this information, and background information about the

⁴⁵ Ibid., 21-22.

correspondent. A semiformal unit included any two of these three pieces of information, while an informal unit of correspondence was a request for information with no contextual information provided about the researcher's background or purpose for requesting the information. Because the log sheets were too sparse, question formality was not recorded for phone calls unless an additional correspondence medium was used.

The number of collections involved, the response time of the SHC, and the number of exchanges between the researcher and the SHC were recorded. The number of collections involved tallied the collections mentioned by the researcher or the Southern Historical Collection staff in a correspondence unit. The response time recorded the number of days it took the Southern Historical Collection to respond to an inquiry. If there was more than one exchange, only the response time for the first exchange was recorded. If the initial correspondence was not dated, the response time was left blank. If the correspondence mentioned using the Web or the online catalog, this was noted on the collection sheet, and coded into a yes/no variable.

The final items recorded were whether the researcher filled out a research agreement and whether he or she came to the Southern Historical Collection in person. If a researcher received photocopies or borrowed microfilm through interlibrary loan, the Southern Historical Collection requested that he or she fill out a research agreement and return it by mail. If the researcher actually came to the Southern Historical Collection, he or she was required to fill out a research agreement in person. To determine the answers to these two questions, the research agreements were examined. Research agreements returned by mail could be differentiated from those filled out in person because they were marked with "mail" in the corner. For correspondence units in 1995, the research

agreements two years prior and two years following 1995 were examined, as well as those in 1995, in order to determine all visits related to the remote correspondence. For correspondence units in 1999, the research agreements for 1999 and the two years prior were examined. Other information available on the research agreement was used to confirm the purpose of research, type of request, and if the researcher had used the Web or the online catalog to discover holdings information.

Finally, the reference archivist at the Southern Historical Collection was interviewed to help place the results of the data analysis into context. The archivist was asked to describe the SHC's overall reference philosophy, the workflow for remote correspondence, and to describe the effects that e-mail has had on reference correspondence.

Findings

The sample taken from the reference correspondence came from the time periods listed in Table 2. It is not clear why the amount of correspondence dropped during the second half of 1999. It is possible that not all of the correspondence records for that year were filed at the time that they were examined. Whatever the cause, 1999, when taken as a whole, witnessed more than one and half times the correspondence of 1995. Whether the first half of 1999 was anomalous cannot be ascertained within the limits of this study.

Table 2: Date of Correspondence, by Percent

Date	Percent	Total for Year
1995, Jan.-June	20.3	38.5
1995, July-Dec.	18.2	
1999, Jan.-June	41.2	61.5
1999, July-Dec.	20.3	
TOTAL	100%	100%
	n=595	n=595

Method of Correspondence

The medium that correspondents used queries changed dramatically between 1995 and 1999, with the most significant switch being from letter-writing to e-mail (Table 3). Whereas letters constituted nearly two-thirds of the correspondence in 1995, by 1999 e-mail increased to encompass nearly half of all of the correspondence and letters

decreased to under 20 percent. Phone calls and facsimiles stayed relatively constant. In the future, as e-mail continues to become more common and accepted, it will probably constitute well over half of the remote reference correspondence. Currently, letters are nearly always used when a researcher is requesting permission to use manuscript material in a work to be published, but this may change as e-mail continues to spread and comes to be considered an acceptable substitute for paper letters. The increase in e-mail has also led to an increase in the occurrence of multiple methods of correspondence being used for a single inquiry. Inquiries in 1999 were more likely to use more than one method of correspondence than those in 1995. Anyone calling or using e-mail to request photocopies receives the forms through mail delivery. Until more material is available in electronic format or is scanned digitally, this will continue to be the case.

Table 3: Method of Correspondence, by Percent

Medium	1995	1999	All years
Letter	66.4	17.2	36.1
Phone	25.8	34.2	30.9
E-mail	3.5	44.8	28.9
Fax	4.4	3.8	4.0
TOTAL	100%	100%	100%
	n=229	n=336	n=595

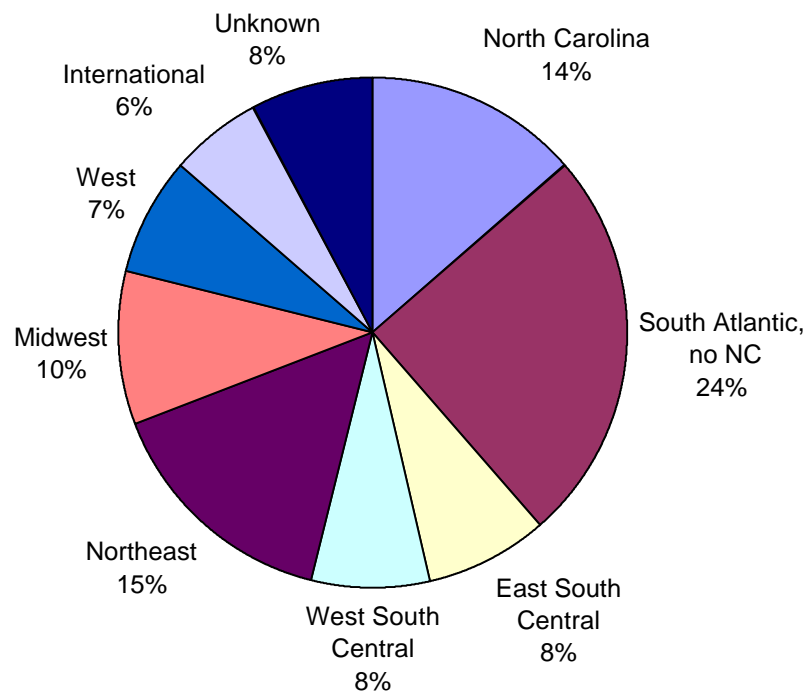
Location

The location of the correspondents is listed by year in Table 4, and Figure 1 presents a graphical representation of the combined years. Correspondents contacted the Manuscripts Department from all over the world, though more than half came from the southern United States, the Southern Historical Collection's collecting region. The

largest change between the two years was the increase in the number of unknowns. The surge in e-mail correspondence in 1999 brought the potential for more correspondents' locations to remain anonymous. With letters, one must include an address in order to receive a reply, and a phone call's originating region can be determined from the area code, but an e-mail address from a national service provider can from any location. People contacting the archives through e-mail tended to be located farther away from North Carolina, so the number of correspondents from the Midwest, the West, and international locations may be slightly higher than the results indicate. Phone calls and faxes tend to be made by those located closer to the archives, probably due to the cost of long-distance calling, especially for international users. With e-mail, cost does not increase with distance, so people from farther away are more likely to use this method. Letters are not more likely to come from any particular location. If location is examined after removing the unknowns, there is no significant difference between the years. It appears that main change is that correspondents from farther away now contact the archive through e-mail rather than write letters.

Table 4: Location of Correspondents, by Percent

Location	1995	1999	All years
North Carolina	11.8	14.8	13.6
South Atlantic, no NC	27.5	23.2	24.9
East South Central	8.7	7.4	7.9
West South Central	7.9	7.4	7.6
Northeast	20.5	12.0	15.3
Midwest	8.3	10.7	9.7
West	6.6	7.9	7.4
International	7.4	4.9	5.9
Unknown	1.3	11.7	7.7
TOTAL	100% n=229	100% n=366	100% n=595

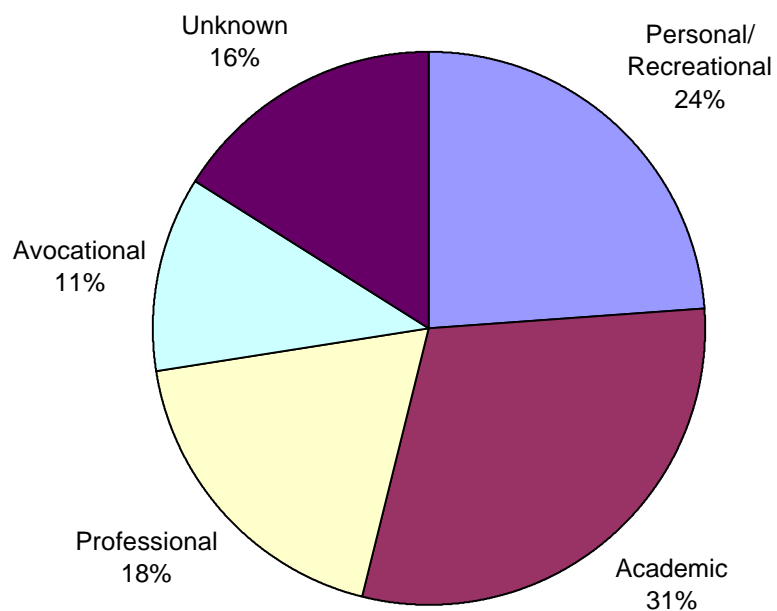
Figure 1: Location of Remote Correspondents, Both Years

Purpose of Research

The purpose of research was determined by reading the correspondence, though for 96 cases, 59 of them phone calls, the purpose could not be ascertained (Figure 2). The distribution of the purpose of research did not change very much between the two years, with the exception that the proportion of personal users increased significantly from 1995 to 1999 (Table 5). Academic users decreased slightly, but the change is not statistically significant. The number of unknowns, which are more likely to be personal users than any other type (personal users are less likely to include background information than other types of users—see the formality subsection), could mean that the increase of personal users was greater than Table 5 indicates. This distribution is distinct from the distribution of researchers writing to the National Archives, where personal users comprised more than half of the remote correspondents for whom a purpose could be identified.⁴⁶ The Southern Historical Collection, being associated with an academic institution, caters more to academic users. In 1996 and 1997, academic users constituted approximately two thirds of visitors to the SHC.⁴⁷ Users who contact the archives remotely have a greater variety of research purposes than those that visit in person, as academic users accounted for only 36 percent of known purpose of research in the remote user sample.

⁴⁶ Conway, *Partners in Research*, 139.

⁴⁷ Philips, *Usage Patterns for Holdings Information Sources*, 21.

Figure 2: Purpose of Research, Both Years**Table 5: Purpose of Research, with Unknowns Removed, by Percent**

Purpose	1995	1999	All Years
Personal/Recreational	23.5	31.8	28.5
Academic	39.0	33.8	35.9
Professional	23.5	21.1	22.0
Avocational	14.0	13.4	14.6
TOTAL	100%	100%	100%
	n=200	n=299	n=499

Note: For 29 cases in 1995 and 67 cases in 1999 the purpose of research could not be determined; these cases have been excluded.

Different types of researchers significantly preferred different methods of correspondence in 1999, when e-mail was an important factor (Table 6). The strongest correlation is between professional users and the use of phone calls or facsimiles, holding true in both 1995 and 1999. Professionals were much more likely than other users to choose this method of contacting the Manuscripts Department and were less likely to submit their queries electronically. However, this correlation may be overstated because of the sparse information gathered on phone calls. Professional users nearly always can be identified because of their association with an organization, while other types of researchers more often remain anonymous. Academic users may note their affiliation with an academic institution through a mailing address, but may instead provide a personal mailing address, particularly if they are students. Professionals almost always call while on the job and thus provide their company's address. Though the correlation may be somewhat exaggerated, it still probably would hold true if all of the unknowns were accounted for because professionals tend to want discrete pieces of information quickly and can afford to make long-distance calls at their organization's expense. Personal users evidence a significant positive correlation with e-mail use. They used e-mail for 61 percent of the queries in the 1999 sample, and also constituted the largest proportion of e-mail users (40%). Academic users were the next largest percentage of e-mail users in the sample (37%), but are not significantly more likely to use e-mail than to write letters in comparison to the other purposes of research, even though e-mail accounted for 54 percent of their correspondence in 1999. Letters requesting permission to use manuscript materials in publication boosted the amount of letter writing for academic users. Avocational users do not demonstrate a strong preference toward any of

the three methods of correspondence. Their more involved research questions may lead them choose the more formal communication of a written letter over e-mail, compared with personal users. Nevertheless, they have kept up with the use of e-mail compared to the other groups and are not statistically less likely to use e-mail. For all research purposes except professional, e-mail was the most frequently used method to contact the archive in 1999.

Table 6: Relationship between Purpose of Research and Method of Correspondence in 1999, by Percent

	Personal/ Recreational	Academic	Professional	Avocational	TOTAL
Letter	10.5	23.8	17.5	28.2	n=56
Phone/Fax	28.4	22.8	57.1	28.2	n=97
E-mail	61.1	53.5	25.4	43.6	n=145
TOTAL	100% n=95	100% n=101	100% n=63	100% n=39	n=298

Note: For 67 of the cases in 1999 the purpose of research could not be determined; these cases have been excluded.

Type of Request

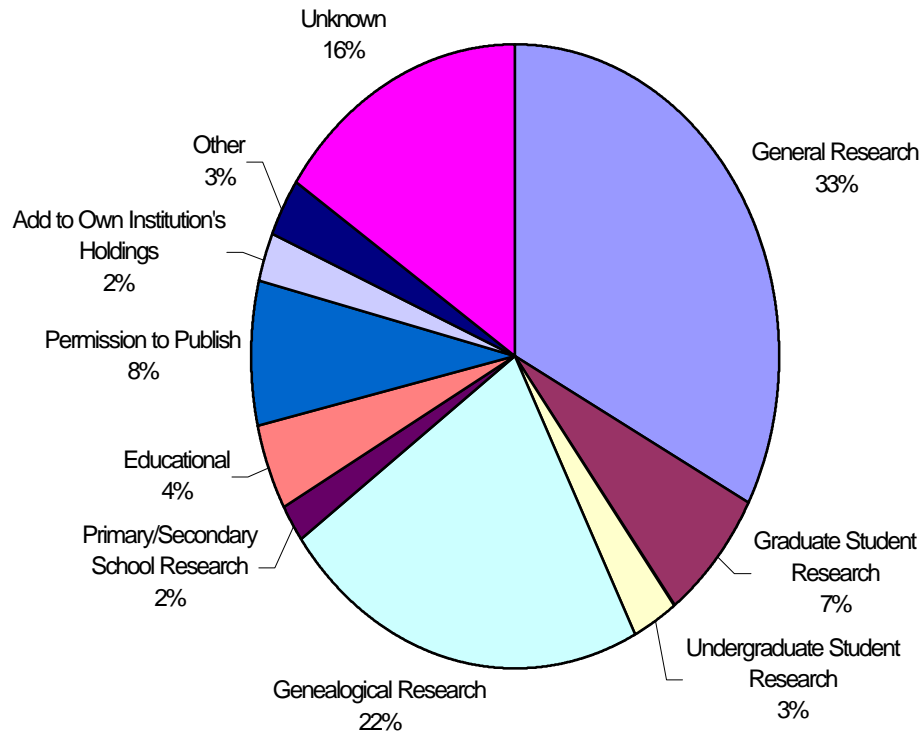
The type of request was ascertained by examining the correspondence. The type of request could not be determined for 93 cases, accounting for 16 percent of the sample. Sixty-seven of the unknowns were requests submitted over the telephone. The request types are listed in Table 7, with the unknowns removed, and in Figure 3, including the unknowns. For analysis purposes, the request types were condensed into five categories: general research, genealogical research, and permission to use in publication were left the same; undergraduate, graduate, and primary/secondary school research were placed into the single category of student research; and the rest of the categories were combined into

one category of other requests. Other requests include research for documentaries or educational exhibits, and requests to obtain copies of materials for patron use at another institution. There is no significant difference between the types of requests asked in 1995 and 1999. Request type is highly correlated with purpose of research, through the following significant relationships (Table 8). Personal users are primarily genealogists (83%), while academic users tend to have general research requests (43%), student research requests (39%), and requests for permission to use materials in publication (15%). Professional users inquire about general research subjects (55%) and other requests (36%). Avocational users inquire on general research subjects (58%) and genealogical research (25%).

Table 7: Request Type by Percent, with Unknowns Removed

Request Type	1995	1999	All Years
General research	38.1	39.3	38.8
Graduate student research	10.7	6.6	8.2
Undergraduate student research	1.5	4.6	3.4
Genealogical research	27.9	26.5	25.6
Primary/Secondary school research	2.0	2.6	2.4
Educational, Exhibits, Documentaries	5.1	5.2	5.2
Permission to publish	10.7	8.2	9.2
Add to own library's holdings	3.0	2.6	2.8
Other	1.0	5.2	3.6
TOTAL	100%	100%	100%
	n=197	n=305	n=502

Note: For 32 cases in 1995 and 61 cases in 1999 the type of request could not be determined; these cases have been excluded.

Figure 3: Types of Requests, Both Years**Table 8: Relationship between Request Type and Purpose of Research, by Percent**

	Personal/ Recreational	Academic	Professional	Avocational	TOTAL
General Research	8.5	42.7	54.5	57.8	n=180
Student Research	0.0	39.3	0.0	0.0	n=70
Genealogical Research	83.0	0.0	0.0	25.0	n=133
Other Requests	7.8	2.8	35.6	7.8	n=57
Permission to publish	0.7	15.2	9.9	9.4	n=44
TOTAL	100% n=141	100% n=178	100% n=101	100% n=64	n=484

Note: For 111 cases, the request type and/or the purpose of research could not be determined; these cases have been excluded

There are two significant correlations between the method of correspondence and the type of request in 1999 (Table 9). Researchers performing student research use e-mail as the dominant method to submit their inquiry (69%) and researchers requesting

permission for publication use letters most often (60%). Though student research requests accounts for only a small percentage of the total remote reference correspondence, the frequent use of e-mail by younger researchers is an indicator that e-mail will become an even more dominant method of reference correspondence in future.

Table 9: Relationship between Request Type and Method of Correspondence in 1999, by Percent

	General Research	Student Research	Genealogical Research	Other	Permission for Publication	TOTAL
Letter	15.8	9.5	14.1	25.0	60.0	n=59
Phone/Fax	39.2	21.4	28.2	32.5	16.0	n=95
E-mail	45.0	69.0	57.7	42.5	24.0	n=151
TOTAL	100% n=120	100% n=42	100% n=78	100% n=40	100% n=25	n=305

Note: For 61 cases in 1999 the request type could not be determined; these cases have been excluded.

Object of Inquiry

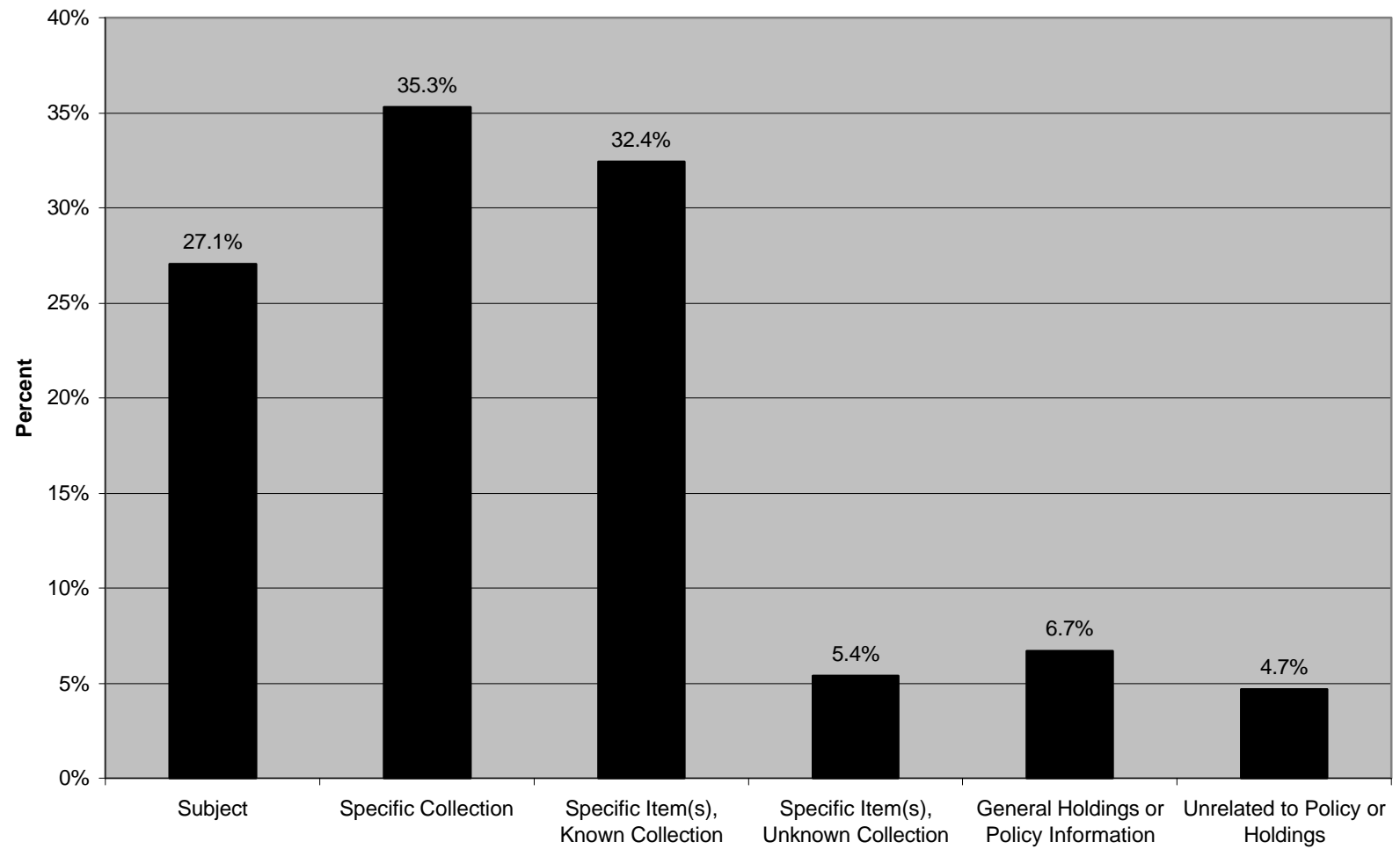
The object of inquiry provides a way to examine the components of reference questions, in order to reveal the level on which researchers request information. Because a request can relate to more than one type of item, percentages sum to more than 100 percent (Figure 4). Inquiries relating to a specific collection were the most common (35%), followed by inquiries relating to a specific item or items (32%) and those of general subject nature (27%). Other types of inquiries accounted for considerably smaller portions of the correspondence units. There were two notable significant changes between inquiries in 1995 and 1999. First, subject requests were more likely in 1995 than in 1999. The Southern Historical Collection's webpage and online descriptions of

collections could account for the difference. If remote users are able to view the website and search the online catalog, they can narrow their inquiry to a collection or even specific items before contacting the Manuscripts Department, instead of asking a question on a general topic and hoping the archive can supply a list of relevant collections.

The second notable change is an increase in the number of inquiries that do not relate to the holdings at the Southern Historical Collection. This category did not account for a large number of requests in either year (four in 1995 and 24 in 1999), but the increase is significant. This too can be attributed at least in part to the increased use of the Internet by remote users. Several correspondents appeared to have simply stumbled onto the website and asked questions that clearly had no relation to a manuscripts repository, such as one student who wanted information on how to transfer to the University of North Carolina and another person who wanted the phone number of a museum in Wilmington.

Analysis as to whether the questions being asked were open or closed did not yield significantly different results between the two years (Table 10). Users in 1999 could find more access tools and holdings information available online, allowing them to narrow their area to specific materials or collections and ask closed questions, but outreach efforts through the Internet also brought more novice and recreational users with less understanding of the archives, who asked open questions. These two opposite effects induced by Internet usage appear to have balanced each other out. Mention of the online catalog or of the Web does increase significantly from 1995 to 1999, showing that users are taking advantage of the online holdings information (Table 11). Although only 26 discovered holdings at the Southern Historical Collection, especially in informal

Figure 4: Object of Inquiry, Both Years



correspondence that lacked background information. Thus, the fact that more than a quarter of remote users do mention using the Internet shows the great impact of the new technology. Genealogists frequently expressed joy at finding the papers of an ancestor, and wondered how they could have found the collection without the aid of the Internet.

Table 10: Open and Closed Questions, by Percent

Question	1995	1999	All Years
Closed	57.2	63.1	60.8
Open	42.8	36.9	36.5
TOTAL	100% n=229	100% n=366	100% n=595

Table 11: Mention of the World Wide Web or Online Catalog, by Percent

	1995	1999	All Years
No	95.6	74.0	82.4
Yes	4.4	26.0	17.6
TOTAL	100% n=229	100 n=366	100% n=595

The method of correspondence does not have a significant effect upon the object of inquiry. There were more subject requests and more requests unrelated to holdings across all correspondence methods in 1999. E-mail requests are much more likely to mention the Internet than other types of correspondence, presumably because some researchers who used e-mail found the e-mail address through the archive's webpage and most if not all e-mail users are knowledgeable about the Internet.

There are some interesting correlations between the object of inquiry and the

purpose of research (Table 12). Personal users are significantly more likely to ask about a subject, less likely to ask for specific known items in the collection, and more likely to inquire about topics unrelated to the archive's holdings or policy information. As a result, they are also more likely to ask open questions. The results change slightly when the differences in the two years are controlled. When examining only 1999, there is a positive relationship between personal research and specific collections and the relationship with open questions loses its significance. This could be because the increased use of the Internet has allowed the researchers to choose their collections before contacting the archives. Academic users are also more likely to have general subject questions, although the correlation is not as strong as it is for personal users. When year is controlled, academic users no longer show any significant correlations with object of inquiry, again illustrating the shift away from general subject questions. Comparatively, professional researchers have more directed questions. Their inquiries are less likely to be of a general subject nature and more likely to be for specific items, whether the collection in which the item located is known or unknown. Inquiries for professional research are also less likely to consist of open questions and are less likely to consist of questions unrelated to holdings or policy information. Avocational users do not have any significant correlations except that they are less likely to ask questions unrelated to policy or holdings than other. Clearly personal users are the most casual users of the archives, asking the least directed questions and the ones most likely to ask inappropriate questions. The Internet was mentioned equally by all of the researchers, with the exception of professional researchers, who display a negative correlation with

mentioning the Internet. The reason for this could be that they tend to use phone calls more often, for which less information is recorded.

Table 12: Relationship between Object of Inquiry and Purpose of Research, by Percent

	Personal/ Recreational	Academic	Professional	Avocational	TOTAL
Subject	36.6	30.2	15.5	22.1	n=138
Collection	40.8	34.1	29.1	30.9	n=172
Known Item(s)	17.6	38.0	44.5	38.2	n=168
Unknown Item(s)	2.8	3.4	11.8	2.9	n=25
General Policy	4.9	10.1	5.5	5.9	n=35
Not Related	9.2	2.2	0.9	8.8	n=24
TOTAL	n=142	n=179	n=110	n=68	

Note: Because the categories are not mutually exclusive, results sum to more than 100%

The relationship between request type and object of inquiry also yielded some notable correlations (Table 13). Genealogical research requests tend to be broader than other types of requests, evidencing significant correlations with asking open questions relating to subjects and collections, but not to specific items. Genealogists often contacted the Manuscripts Department with the names of their ancestors, hoping to find collections that mentioned these people. If they had collected more background information, they might have begun by asking about specific collections that seemed promising. Student research requests, like genealogical research requests, have significant positive correlations with open questions and subject requests. Student requests are also more likely to ask about general holdings or policy information, perhaps because as aspiring researchers, students are attempting to learn more about the archives. Importantly, when requests are controlled by year, students' questions in 1999 are no

longer positively correlated to either open questions or subject queries and genealogical requests are no longer correlated with subject queries. Instead both become positively correlated with collection requests, further evidence demonstrating the narrowing of the types of requests asked as holdings information available on the Internet increases and as more people become familiar with using the Internet. Student research requests are the only type of request to display a positive correlation with mentioning the Internet when examining the two years combined (Table 14). The correlation between student requests and mention of the Internet disappears in the 1999 sample, and in 1995 there is not enough data to reliably assess correlations, but it appears as if students were more likely than others to mention the Internet during 1995. Again, this result highlights student researchers as being the most forward-looking of the researchers in terms of embracing the Internet. It also indicates that students are exploring the Web and finding out on their own about the archives rather than simply relying on professors to inform them of archival holdings.

Table 13: Relationship between Request Type and Object of Inquiry, by Percent

	General Research	Student Research	Genealogical Research	Other	Permission	TOTAL
Subject	29.2	40.0	36.8	8.6	2.2	n=140
Collection	36.9	28.6	43.6	20.7	32.6	n=177
Known Item(s)	37.9	31.4	19.5	29.3	60.9	n=167
Unknown Item(s)	3.6	5.7	2.3	15.5	0.0	n=23
General Policy	4.6	14.3	5.3	10.3	2.2	n=33
Unrelated	2.1	1.4	4.5	25.9	2.2	n=27
TOTAL	n=195	n=70	n=133	n=58	n=46	

Note: Because the categories are not mutually exclusive, results sum to more than 100%

**Table 14: Relationship between Student Requests and
Mention of the Internet, by Percent**

	Mention of Internet		
	1995	1999	All Years
Student Research	17.9	40.5	31.4
All Other Requests	2.4	26.2	16.9
TOTAL	n=9	n=86	n=95

Response of the Manuscripts Department

To interpret the Southern Historical Collection's response, it is necessary to understand its reference philosophy and method of staffing. Reference and public service are handled by two full-time archivists with advanced degrees in history, two graduate students studying information and library science (1/2 Full Time Equivalent), two undergraduate students (1/2 FTE), and an administrative assistant (approximately 1/2 FTE). The graduate student positions are the most recently added positions to provide public service, having existed for about two years. The reference archivists handle all of the in-person reference interviews, letter correspondence, and any phone calls or e-mail requests that other staff members refer to them. The graduate students are in charge of managing questions that are sent to the department's e-mail reference address. The archivists have their own e-mail accounts, but most of the reference queries come through the departmental account. The graduate students are trained for this duty with a written policies manual, though much of their training is similar to an apprenticeship, with one of the reference archivists watching over their work carefully at first, until the archivists feel that the graduate students are confident and competent with their responses. Questions that are unclear, require special subject knowledge, or relate to specific policies on

photocopying or permission statements are turned over to one of the archivists. The undergraduate students do not perform any true reference duties, but are available to assist researchers in retrieving and filing requested materials. The administrative assistant answers phone reference queries, but also will refer questions to one of the archivists if necessary.

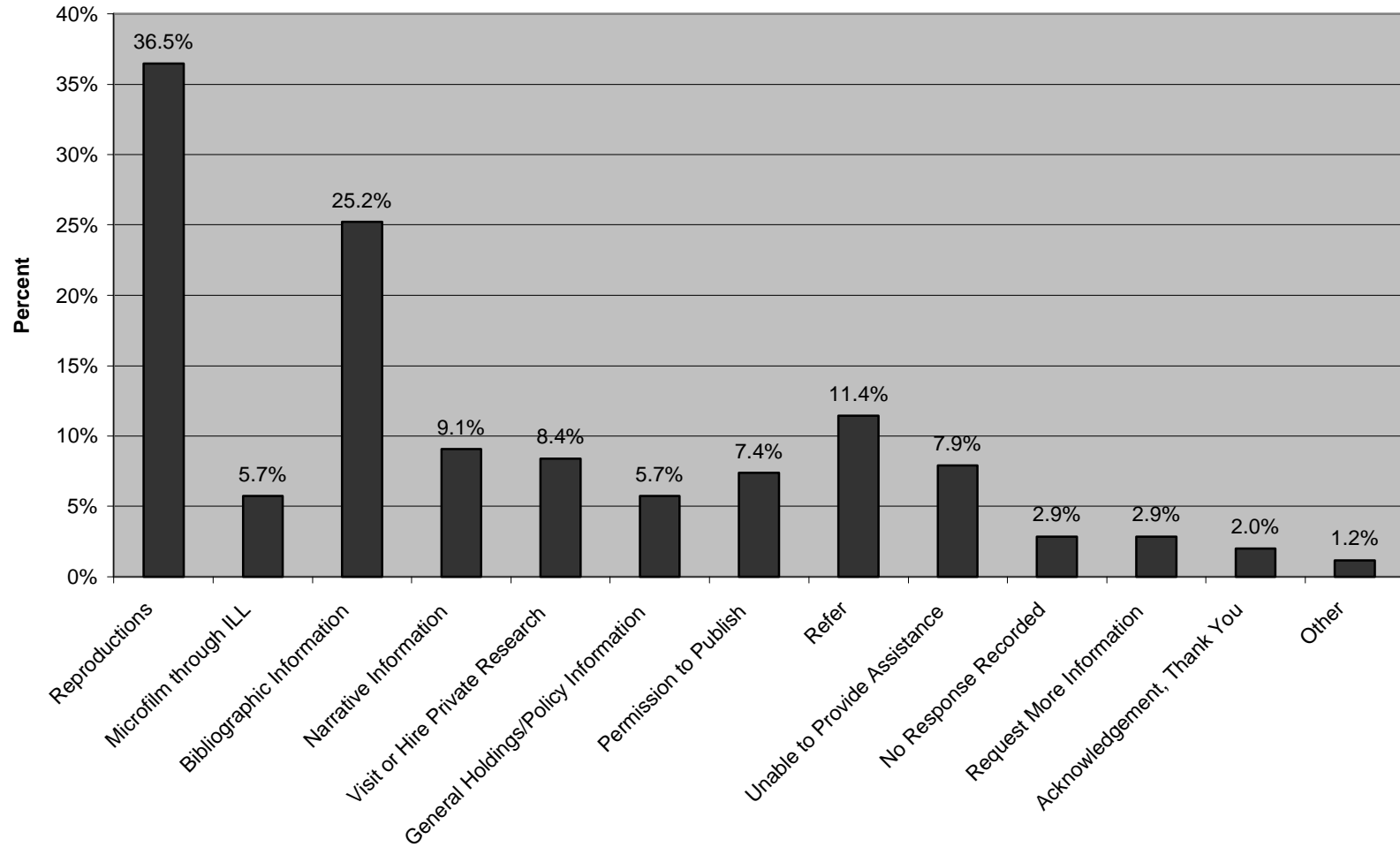
Remote users are served on a first-come, first-served basis, but visiting researchers take precedence over remote users when it comes to reference help. The reference staff take their duties very seriously, and every researcher who comes to the Southern Historical Collection is interviewed by one of the two full-time reference archivists, typically when the researcher first arrives, and possibly again, to follow up on the progress of the research. Although local users are given more priority than remote users, staff members do not neglect the needs of remote researchers. All questions are analyzed and typically given a reply in less than a week's time. But because of the large volume of remote correspondence, the staff basically answer the question with what information the remote researcher provides, and do not try to make assumptions or probe for further clarifying details. Although it can be difficult to ascertain the background of a researcher or even if the researcher is asking the right questions, the information the researcher initially provides is taken at face value and questions are answered based on this information. Depending on how broad the question is and how much material the researcher is interested in, staff members will read through manuscripts in an attempt to answer a question. For very vague questions or queries that involve a large amount of materials (especially if the material has not been processed in depth), however, staff members encourage the researcher to visit personally or hire a private researcher for

assistance. With subject questions, the reference archivist stresses that the Internet is only a tool and does not provide a comprehensive listing of everything that is available in the collection. The archivist encourages people to use the descriptions on the website to narrow their search to specific collections in the areas in which they are interested, as a way to make visits more efficient, but does not see the website as replacing the need to visit in person. Researchers who visit have access to additional information through the card catalog, be able to have a personal reference interview, and possibly are able to find more materials that fit their interests. With 4,600 collections and 17 million items, coming to visit can often be the best choice.⁴⁸

The responses of the Southern Historical Collection are recorded in Figure 5. The largest category is providing reproductions or information about reproducing (36%), followed by providing bibliographic information (25%). None of the other response categories occurred in more than 10 percent of the cases analyzed, with the exception of referral, which occurred in 11 percent of the cases. There are few significant changes between the two years. The Southern Historical Collection replied that it was unable to provide assistance more often in 1995 and referred the user to another department or institution more often in 1999. Correspondents who contact the archives via e-mail are more likely to be referred than those who use regular mail. This can be attributed to the use of a form letter for answering reference correspondence. The written form letter, sent in cases when letter correspondence is of a routine nature, includes a section for informing the user that the SHC could not find any useful information on the topic, but not a specific

⁴⁸ Richard Schrader, interview by author, 15 March 2000,

Figure 5: Response of the SHC, Both Years



section for referral (though a staff member could always write down another place to look, which did happen). Correspondence answered over e-mail does not have a form letter to use, so staff members simply write an entire response each time. Without a specific section to check, staff members seem more inclined to provide the correspondent with an alternative.

The larger categories of the archive's response were tested for correlations with the object of inquiry and the method of correspondence. The last four categories listed in Figure 5 occurred too infrequently to allow for any reliable correlations, so these categories were omitted. For the object of inquiry, only the largest three categories—subject, collection, and specific items requests—were tested for correlations, again because of the small numbers placed in the other categories (Table 15). Subject requests, the most general object of inquiry, have a positive correlation with receiving bibliographic information and narrative information and a negative correlation with receiving microfilms. The Southern Historical Collection is also less likely to provide permission to publish and more likely to refer the inquiry elsewhere or be unable to provide assistance in the case of subject requests. Requests focusing on a specific collection show a positive correlation with receiving bibliographic information. The SHC is more likely to invite people asking about a specific collection to visit, perhaps because of the large size and limited processing of some of the collections. The SHC is less likely to refer collection inquiries elsewhere or to be unable to assist in answering the question. Once users are able to narrow research to a specific collections or items, they have a greater chance of being able to receive assistance from the SHC. Item requests, the most directed and specific object of inquiry, are more likely to receive reproductions

and less likely to receive bibliographic or general holdings and policy information. They also demonstrate positive correlations with permission to publish and negative correlations with receiving a referral or no assistance.

Table 15: Relationship between Object of Inquiry and SHC Response, by Percent

	Subject	Collection	Known Item(s)	TOTAL
Reproductions	20.5	36.2	64.2	n=217
Microfilm/ILL	5.0	9.5	5.2	n=34
Bibliographic Information	41.6	43.9	15.0	n=150
Narrative Information	13.7	9.5	10.9	n=54
Suggest Visit	8.7	13.8	5.2	n=50
General Information	4.3	6.2	0.0	n=34
Permission to Publish	1.2	6.7	14.5	n=44
Referral	25.5	5.2	4.7	n=68
Cannot assist	14.3	4.8	2.6	n=79
TOTAL	n=161	n=210	n=193	

Note: Because the categories are not mutually exclusive, results sum to more than 100%

Although the method of correspondence does not have many significant correlations with the object of inquiry, the response of the Southern Historical Collection is influenced by the medium used to submit an inquiry (Table 16). Phone calls and faxes, which have been shown to represent a large number of professionals who ask directed questions, continue in this vein by being positively correlated with receiving reproductions or bibliographic information, and are also significantly less likely to be recommended to visit than those writing either through the mail or electronically. These correlations hold true for both years. Question negotiation that takes place over the phone allows the SHC to refine the question so that either a finding aid for a collection or actual documents can be sent, making a visit unnecessary. It is possible that people

inquiring through the telephone are recommended to visit, but because staff members do not record this on the log sheet there is no way to be sure. E-mail and letters are less likely than phone calls to receive either bibliographic information or reproductions. E-mail has a significant positive correlation with referrals and suggestions to visit, in comparison to phone calls and letters. Broad subject questions asked over e-mail may account for the increased likelihood of a suggestion to visit, and the large number of questions asked over e-mail that do not relate to the SHC's holdings or policy information are responsible for the increased likelihood of referral. The Southern Historical Collection is more likely to encourage personal users to visit or to refer them, because personal users prefer e-mail as their medium of communication and tend to ask broader subject questions.

Table 16: Relationship between Method of Correspondence and SHC Response, by Percent

	Letter	Phone/Fax	E-mail	TOTAL
Reproductions	32.2	46.4	29.7	n=217
Microfilm/ILL	7.9	2.9	6.4	n=34
Bibliographic Information	20.1	37.8	16.3	n=150
Narrative Information	10.3	8.1	8.7	n=54
Suggest Visit	10.3	2.9	12.8	n=50
General Information	4.2	6.2	7.0	n=34
Permission to Publish	16.4	2.4	2.3	n=44
Referral	5.6	7.2	23.8	n=68
Cannot assist	9.3	6.2	8.1	n=79
TOTAL	n=214	n=209	n=172	

Note: Because the categories are not mutually exclusive, results sum to more than 100%

The time it took the SHC to respond, the number of exchanges, and the number of collections involved in each unit are recorded in Table 17. Differences between the means were tested using an independent samples t-test to test for significance at the 95 percent confidence level. The Southern Historical Collection clearly maintained an average response time of shorter than a week for 1999. Response time decreased significantly from 1995 to 1999, due to the larger percentage of correspondence that was handled through e-mail. The Southern Historical Collection does not stamp letters when they arrive, so the mean response time for letters includes the delivery time, giving them a longer response time. The mean response time for e-mail in 1999 is 3.67 days, compared with 8.96 days for letters, so even taking this into consideration, delivery time may not account for the entire difference. Electronic inquiries may have a faster turn around because the medium engenders more of a sense of urgency than mail correspondence, or because some of the e-mail questions do not require a complex response and can be answered more quickly. The difference in the number of exchanges between years was not significant, but the slight increase could be due to the increased use of e-mail, which, in a different independent sample t-test proved to have significantly more exchanges than letters in 1999. This does not mean that e-mail correspondence receives more question negotiation but rather indicates that the archive staff needs to perform an additional exchange to obtain the address of the researcher, if he or she requested reproductions. The small number of exchanges per correspondence unit shows that the archive does not usually perform any question negotiation with remote users. There is a significant decrease in the number of collections involved in each correspondence unit. The number of collections involved per unit in either year was not

large, with 95% of the units involving two or few collections. The decrease in 1999 could be due to the increased number of requests that do not relate to the archive's holdings, or to more people narrowing their search through online holdings information. Online holdings information allows users to select their collections of interest before submitting an inquiry, rather than having to wait for the archive to send a list of potentially useful collections. Four hundred thirty-seven identifiable collections from the Southern Historical Collection were involved in one or more correspondence units. A list of the names of the collections involved in the correspondence sample is available in Appendix B.

Table 17: Means of Time to Respond (in days), Number of Exchanges, and Number of Collections Involved

	1995		1999		All Years	
	mean	SD	mean	SD	mean	SD
Response time	8.10	11.82	4.41	5.54	1.08	8.66
Number of exchanges	1.20	.52	1.27	.58	1.24	.56
Collections Involved	1.31	1.97	.95	1.10	1.08	1.51

Formality of Inquiries

Formality indicates the amount of background information provided by the user. An inquiry was considered formal if it included three pieces of information: a specific request for information, the purpose for which the researcher needed the information, and background information about the researcher. Semiformal inquiries had two of these three pieces of information, and informal inquiries included only a request for information with no context about the request. The formality of the correspondence units

declined significantly between the two years (Table 18). This difference can be attributed to the large increase in e-mail correspondence in 1999, which replaced much of the letter correspondence. A remote user who takes the time to write a letter to the archives tends to provide at least some background information or information explaining how the research will be used, placing the letter in the semiformal category. This information helps staff at the archives to determine the best way to answer the question, particularly if the inquiry is an open question. Indeed, open questions are significantly more formal than closed questions. Remote users submitting queries through e-mail are much more likely to simply dash out a quick question and hope for a reply, for example, "Please send me any and all information on Civil War." A question asked in this manner, with no context, is much more difficult for a reference archivist to answer. If the archivist were to know whether the correspondent was beginning research on a dissertation or was a third-grade student who need to create a poster on a topic relating to the Civil War, that information would shape very different answers. Because the Southern Historical Collection does not tend to probe users for more information, the typical response to a question of this sort would be to suggest that the researcher come to visit, or to ask the user to narrow the topic and then submit another question. The increase in informality clearly hinders the provision of good reference service. Table 19 provides a breakdown of formality by e-mail and letter. With only eight e-mail units in 1995, no conclusions can be drawn regarding differences in formality between e-mail from 1995 and e-mail from 1999. For comparison, the formality of letter correspondence in 1995 is provided. Though letters have become more informal in 1999, the difference in formality in letters between 1995 and 1999 is not significant.

Table 18: Formality by Year, by Percent

Formality	1995	1999	TOTAL
Informal	6.1	20.3	n=65
Semiformal	52.4	56.8	n=248
Formal	39.7	22.9	n=152
TOTAL	100% n=179	100% n=266	n=445

Note: Formality could not be determined for 50 cases in 1995 and 100 cases in 1999; these cases have been excluded.

Table 19: Formality and Background Information Provided in 1999

Formality	E-mail in 1999	Letters in 1999	Letters in 1995
Informal	26.2	12.7	6.7
Semiformal	59.1	42.9	54.0
Formal	14.6	44.4	59.3
TOTAL	100% n=164	100% n=63	100% n=152

The purpose of research has a stark effect on question formality, particularly in 1999 (Table 20). Personal users were the most likely to be informal (26%) and are rarely formal (12%). By contrast, professional users nearly always identified the purpose of their research and often provided additional information as well. In 1999, all professional users in the sample provided at least some contextual information, establishing a strong correlation between professional purpose of research and increased formality. Personal users, as discussed earlier, are the users most likely to be referred or to be invited to visit. They are also the ones most likely to contact the archive via e-mail. It is difficult to

determine with certainty if e-mail causes personal researchers to be more informal, but this appears to be the case. There was no correlation between formality and personal users in 1995, suggesting the e-mail has been the catalyst for more informal queries to be submitted by personal researchers. Formality can play a large role in the response of the archive toward personal users, because without knowing the context of the research question or the status of the requestor, the best that the archive staff can do is suggest that the researcher visit. Staff cannot perform much research themselves because the remote reference question does not provide enough information.

Table 20: Relationship Between Formality and Purpose of Research, 1999, by Percent

	Personal/ Recreational	Academic	Professional	Avocational	TOTAL
Informal	25.7	15.1	0.0	11.8	n=36
Semiformal	62.2	54.7	62.2	64.7	n=143
Formal	12.2	30.2	37.8	23.8	n=60
TOTAL	100% n=74	100% n=86	100% n=45	100% n=34	n=239

Note: For 123 cases question formality and/or purpose of research could not be determined; these cases have been excluded.

Who Comes to Visit

Remote users can make more intensive use of the collection by either requesting materials through the mail or interlibrary loan, or by visiting the collection in person. A large number of researchers come the Southern Historical Collection, with almost 2,500

registrants visiting the Manuscripts Department during the 1998-1999 fiscal year.⁴⁹ The percentage of remote correspondents requesting materials and actually visiting the collection can be tracked through the research agreements. The Southern Historical Collection sends research agreements to researchers who receive photocopies or request material through interlibrary loan (ILL), and asks that these people return the agreements through the mail. There is undoubtedly some percentage of researchers who receive materials from the SHC but never return the agreement, however, so the number of researchers filling out the research agreement is probably lower than the number of researchers who actually receive photocopies or materials through ILL. Researchers who visit the Southern Historical Collection must fill out a research agreement, so this count is more accurate. Both of these types of researchers make more intensive use of materials than those who simply contact the archive but never examine any of the collections.

The number of remote correspondents both filling out research agreements and visiting the archives decreased from 1995 to 1999 (Table 21). In 1995, 36 percent of the remote users filled out a research agreement and one fifth visited the archives. In 1999, only 16 percent of the remote users filled out a research agreement and visitors accounted for less than one of every ten remote correspondents. For both years, the proportion of researchers filling out a research agreements who came to visit remained the same: 44 percent of the research agreements were for those who actually visited, while the rest were sent by mail. Examination of the research agreements cannot determine how many users decided to pay for private researchers in lieu of their own visits, nor can it reveal cases where the remote correspondent writing to the archives is not the actual person who

⁴⁹ Manuscripts Department, University of North Carolina at Chapel Hill, *Annual Report, 1998-1999*.

needs to use the material. An example would be if a research assistant writes to the archives for a professor, but it is the professor later comes to visit. As a result, these figures may be slightly low because of unidentifiable cases. The results for 1999 may be low because research agreements for the years following 1999 could not be checked as they were for 1995.

Table 21: Percent of Research Agreements Completed and Visits by Remote Users

	1995	1999	All Years
Research Agreement	35.8	19.7	25.9
Visit	15.7	8.7	11.1
TOTAL	n=229	n=366	n=595

The method of correspondence has some correlation with whether a research agreement is filled out. People who write to the archives are more likely to fill out a research agreement than those who mail the archive electronically; however that correlation does not exist for those actually visiting. The purpose of research is a strong factor in determining who returns a research agreement and who visits the archive, and may be the factor behind the correlation between filling out a research agreement and the method of correspondence (Table 22). Researchers who contact the archives for personal research have strong negative correlations between both filling out the research agreement and visiting, which remains significant even when year the is controlled. Academic and avocational researchers are the most likely to visit and fill out the research agreement. Professional researchers do not show a significant correlation in either direction. Clearly, the broader the research purpose, the more likely the researcher is to

visit. Both academic and avocational researchers investigate broader topics than are typical with research done for personal or professional reasons. So while personal users may become an increasingly large fraction of remote users, it appears from this data that academic users will continue to be the ones who come to the archive. It is interesting to note that personal users, though they are the least likely to visit, are the ones to which the archive's staff is most likely to suggest a visit. There is no correlation between inquiries for which the SHC has recommended a visit and those people who do actually visit. It could be that academic users have a better feel for what sorts of questions are more appropriately answered by visiting and do not ask these questions remotely, whereas personal users do not grasp that distinction. Personal users also may not have the resources available to academic users that would make a visit feasible. Unfortunately, when the SHC does suggest that a researcher visit, these suggestions do not appear to be acted upon, unless the users are hiring private researchers.

Table 22: Percent of Purpose of Research who Completed a Research Agreement and Visited

	Personal/ Recreational	Academic	Professional	Avocational	TOTAL
Research Agreement	15.5	41.3	24.5	42.6	n=152
Visit	3.5	20.1	9.1	23.5	n=67
TOTAL	n=142	n=179	n=110	n=68	

Examining the relationship between request types and whether the correspondent filled out a research agreement or came to visit does not yield the same stark results as purpose of research, but it does support the above conclusions (Table 23). Both filling

out the research agreement and coming to visit is less likely with genealogical requests, though in 1999 only the research agreement variable shows a significant correlation. The loss of significance is more due to the decrease in the proportion of remote users visiting than to more genealogists coming to the archives. This result is consistent with the correlation the two variables have with personal users, since almost all genealogy requests are for a personal purpose. With general research requests, most likely to be for academic or avocational purposes, the correspondent is more likely to fill out a research agreement and visit the archives, but like genealogical requests, the latter correlation no longer is significant when year is controlled, due to the fall in the proportion of remote correspondents who visit. Overall, genealogical requests and other request types, which cover the narrowest types of research, are the requests for which the researcher is least likely to make intensive use of archival materials and have the lowest percentages of researchers filling out research agreements or coming to visit. Because the Southern Historical Collection does not specialize in genealogy, it could also be that genealogy users are going elsewhere to perform their research.

Table 23: Percent of Type of Request who Completed a Research Agreement and Visited

	General Research	Student Research	Genealogical Research	Other	Permission to Publish	TOTAL
Research Agreement	39.5	37.1	19.5	17.2	30.5	n=152
Visit	16.4	14.3	6.8	8.6	23.9	n=67
TOTAL	n=195	n=70	n=133	n=58	n=46	

Conclusions

The results of this study support the four original hypotheses, at least to some extent. The first hypothesis, that e-mail is becoming the dominant method of correspondence, is supported by the huge shift from letters to e-mail from 1995 to 1999. The fourth hypothesis, that the Internet has increased the variety of users contacting the archive, is supported by the findings as well. In examining all of the data gathered through reference correspondence at the Southern Historical Collection, one realizes that there is not just one type of remote user. Researchers correspond with the archives for all types of purposes and ask a variety of questions. While researchers came from a variety of backgrounds before the Internet was popular, the variation is even greater with increased Internet use, due to the growth in personal users. The Southern Historical Collection, though it is located in an academic institution, clearly attracts questions from users performing all types of research. As the Internet becomes more commonplace and useful to all researchers, the number and variety of remote questions submitted to the Southern Historical Collection will continue to expand.

The second and third hypotheses are only partially supported by the findings. The third hypothesis, that questions will become more specific with the availability of online holdings information, has proved to be the case for student and genealogical research requests. The number of broad questions posited by novice personal users who stumble upon the website, however, has provided a counterbalancing force to this tendency. The effect of the Internet on the types of questions asked is clearly more complicated than it might first seem, and more questions will have to be studied before any definite

conclusions concerning the implications of the Internet's effects can be reached. The second hypothesis, that e-mail correspondence is more likely to be from casual users, has been shown to be true with the positive correlation between personal users and e-mail use. Avocational users, however, who have a broader and more scholarly approach to personal research interests than personal users, correspond through e-mail as well, and academic users make extensive use of the medium. A more appropriate way to consider the affiliation between personal users and e-mail would be to note that personal users prefer e-mail over other methods of correspondence and are the most prevalent users of e-mail, but questions are submitted via e-mail by all types of users. Personal researchers may generate the largest proportion of e-mail correspondence, but e-mail is not solely the domain of "web surfers"—serious academicians also write to the archive electronically.

The data from this study point to several trends for the future:

1. The use of e-mail will continue to grow at the expense of regular mail. While previous studies did not find e-mail reference to be used extensively, this has clearly changed by 1999. The Southern Historical Collection had almost half of its remote correspondence in 1999 from e-mail and this proportion will probably increase as letter correspondence decreases further. The large percentage of student research requests that were submitted through e-mail is an indication of the shift of younger users toward the electronic medium.

2. There is a greater variety of researchers contacting the archives remotely than in the past. With the availability of e-mail and the Internet, doors truly have been opened to those who had never before considered using archives before. This means that archivists will field more requests for personal researchers, will receive more requests that would be better directed elsewhere, and will simply receive more requests in general. Comparing the two years of correspondence at the Southern Historical Collection, the number of requests has increased by 60 percent. Within the four year time period, the number of personal users doubled, while the number of requests not related to archival holdings or policy information increased by a factor of six.
3. Many remote users will use the Internet to refine their search before contacting the archives. This trend is evidenced by the loss of the positive correlation between genealogists and students in asking open questions and questions related to general subjects when the 1999 data was examined by itself. Users will look for and expect to be able to find holdings information available on the Web. The average number of collections decreased significantly from 1995 to 1999, as more users were able to narrow their request to specific collections. Anecdotally, any users also have expectations for finding the actual primary sources digitally available on the Internet.
4. More users will expect to be able to perform most of their work without ever having to visit the archives. The number of remote users who visited the archives from the sample in 1995 was actually greater than the number who came in 1999, despite remote user sample in 1995. Remote users are no

longer simply contacting the archives to announce their visit; they intending to perform all of their work remotely.

5. Remote users will likely not provide the archives with enough information when submitting queries. The level of formality and background information provided by users dropped significantly between 1995 and 1999, with one or two sentence queries occurring with regularity in the e-mail correspondence. E-mail may be replacing letters for remote users, but does not share all of the latter's characteristics. E-mail is a written form of communication but is treated more like oral communication and is correspondingly less formal.

Implications

Librarians and archivists should not sit idly by and simply watch these transformations. Despite all of the talk of the importance of outreach and lamentation about the underutilization of archival materials, archivists may not truly be prepared to accept large numbers of new users, especially users who are unfamiliar with archival materials. They need to prepare for the future and anticipate new demand. First, having a departmental e-mail address, such as the Manuscripts Department does, is essential. Remote users and local users expect that archives will be available for remote reference correspondence through e-mail, and it is best to channel all of the messages to one location.

Institutions should expect increased demands for remote reference, even if not immediately. The increase in e-mail may necessitate new staffing patterns or even new positions will be necessary. The Southern Historical Collection uses graduate students to

answer e-mail correspondence, but this may not be the most desirable method as e-mail becomes the dominant medium of communication. Certainly, having graduate students available to screen questions saves valuable time for the reference archivists, but it could also mean that remote reference questions over e-mail are not answered with the same level of expertise as other types of correspondence. This strategy requires careful training of the graduate students and sufficient monitoring to be sure that questions are being answered accurately and completely. Questions submitted to the archives over e-mail need to be treated with the same level of care and detail as those questions submitted through letters.

Archives can save time in responding to e-mail requests by creating electronic copies of form letters and photocopy request forms that currently exist only on paper. For example, the Southern Historical Collection has a form letter for reference correspondence that saves the staff time and energy by giving their responses a framework within which specific information can be placed. No such form exists for e-mail, but creating a template for responses would save time in typing responses as well as provide a way to ensure that all questions are answered in a similar fashion with no relevant information omitted. Other forms, such as photocopy orders and permission statements, could also be transferred to an electronic medium to facilitate the use of e-mail. Most current e-mail is able to handle attachments through MIME protocols and this will only improve in the future. Additionally, storing e-mail in an electronic database as well as storing a printout permits old reference questions to be reviewed quickly if similar questions are repeated by many researchers and allows for the review of researcher information if the same user asks several questions over a period of time. The

database can provide a permanent place for storing remote users' contact information and can facilitate the generation of statistics and the analysis of reference questions.⁵⁰ More e-mail correspondence may mean that more time is needed to answer questions, but there are ways to take advantage of the electronic format in order to increase efficiency and offset some of the extra work. As more correspondence arrives at archives in electronic form, an electronic system must be created to complement the paper-based system.

Archivists have discussed the need for more outreach and the need to increase the number of users for many years, and the archival presence on the web is finally making these goals into reality. But the increased variety of users who discover archives through websites creates another set of challenges. If an archive's website represents a user's first exposure to the archive, the website needs to provide information about the archive and its mission to help orient first-time users and provide them with a sense of what an archive is. It will also give experienced users a valuable overview of the collections to help them decide if the archive's collections fit their research interests. Archives can stress that if certain collections do not have descriptions online or that the library's online catalog should be searched first before consulting the finding aids (as is the case with the Southern Historical Collection). Many users may not pay attention to this information and it will not prevent all inappropriate questions from being asked, but it is helpful as a method of educating new users.

Websites can be used to target specific types of users. For example, staff members at the Southern Historical Collection know that academic researchers, genealogists, professionals working on documentaries, and students performing archival

⁵⁰ Tibbo, "Interviewing Techniques for Remote Reference," 307.

research for the first time all contact the archive. The SHC could create separate introductory pages for these different users, highlighting relevant collections and providing group-specific instructional information. This will guide users through the website and help them filter out information that is not useful to them. It may not require too much effort if the archive already has information for specific researchers available in pamphlets. These could simply be adapted for the website. It would be an interesting research question to compare different archives' websites to see how the organization of and information available on a website impacts the use of archival materials.

The Web presents a new avenue to reach users who previously could not or would not use archives, but it also generates new expectations from users. Users have high expectations for what can be accomplished from remote locations. Rather than insist that all users try to visit their archive, archivists should use their website as a way to facilitate remote access. The Southern Historical Collection aids remote users by having holdings information available online, and although simply browsing the online holdings information may not provide the researcher with as much information as they could gather by visiting the collection, this method of research is becoming more common. The importance of technical processing and subject access become even stronger when holdings information is available remotely. Users are beginning to expect that the actual documents will be available online (one user complained to the Southern Historical Collection that he could not figure out how to "open" the documents from the description and needed assistance). Issues of copyright protection and the expense of digitization are beyond the scope of this study, but archivists should know that the demand for instant access has already begun.

Archivists must continue to learn more about their users and the ways of serving them better. As this study shows, users come from all backgrounds and have all types of questions, so assumptions about background or research needs cannot be made with any reliability. This study supports the assertion put forth by Freeman and others that historians are only one of many types of researchers who use archival materials. For remote correspondence, personal researchers are the fastest growing segment of the Southern Historical Collection's user base. The large and increasing number of personal researchers will require more patience and instruction from archivists. Unfortunately, these personal users, who prefer to send informal e-mail messages, are the ones least likely to provide contextual information to aid archivists in answering their questions. The Southern Historical Collection's tactic of not performing question negotiation with remote users means that many questions may not be answered adequately.

Additionally, as user expectations for remote service increase, they will become less willing to visit the collection. Currently, the policy of recommending that researchers visit if at all possible does not result in these people visiting the archives, it simply means that users are leaving the reference exchange with their needs unfulfilled. Some of these questions may truly be too large to be answered by anything other than a visit, but other questions might be answerable remotely if archivists solicit more information from the users. Because users are not likely to provide more information without prompting, archivists need to encourage users to provide more information when they submit their initial query. A form on the archive's homepage provides would be one way to accomplish this. Rather than allowing users to click on the departmental e-mail address and send a one-line question, a Web-based form asking for specific information

would cause users to stop and consider their questions more carefully as well as provide valuable background information that would allow archivists to answer the question more effectively. This form might also decrease queries that clearly cannot be answered by the archive, such as the example of student who wanted information about transferring to the University of North Carolina. As most remote users contacting archives through e-mail now have access to the World Wide Web, technical limitations with forms no longer are a serious limitation.

The design for the web form could be a modified version of the one described by Abels.⁵¹ The form should be complete enough to gather essential data, but not so large that its length or questions discourage use. The form could be divided up into the three sections suggested by Abels or could be even simpler. The first section should include the name of researcher and possibly the mailing address of the researcher (this would help to determine if a visit by the researcher would be feasible and would facilitate the mailing of photocopies or other information). Section II should include information about the actual request. The form could provide a space for the researcher to type a description of the request, a description of the purpose of the request, and a brief statement about the researcher's background. Section III could include a question on the type of information researcher would like, for instance if the archive has different formats of materials available. Some archivists may worry that asking for more information could seem like an invasion of privacy to potential users, but the wording need not be too demanding. A simple statement requesting information could make a large difference without seeming pushy: "Please tell us your request. Any information you can provide

⁵¹ Abels, "The E-mail Reference Interview," 357-358.

about the purpose of your research and your background will assist us in answering your question promptly and thoroughly. Thank you.” Any way to get researchers to provide more initial information will make remote reference exchanges more productive.

As more users contact archives remotely and expect all of their dealings to be remote, archivists should take advantage of the potential for at least a limited reference interview over e-mail. While a full-scale remote reference interview may not be feasible, some question negotiation with researchers can lead to more fruitful exchanges and may help to convince researchers that a visit may indeed be the best option. If a question truly is too large to be answered remotely, archivists can soften the blow when suggesting a private researcher by making it sound more like an extension of their services rather than a dismissal of the question. With e-mail, there is no visual or aural feedback, so short sentences can seem curt when were intended as a kind referral. Archivists must be careful when writing e-mail that users do not misconstrue the tone of their responses, an occurrence which can happen all too easily. Remote reference is just one of the services performed by any archive, so archivists must balance the needs of remote users with the users who visit the archives as well as with other functions that the archive performs. Each archive will need to decide how much time and energy can be expended in aiding remote users, but a little extra time and effort spent in question negotiation could make a large difference in satisfying the needs of remote users.

Despite changes in the methods of correspondence, the need for archivists to know and to understand their user population is as true today as when Maher and Conway exhorted archivists to study their users fourteen years ago. Users should be at the heart of every archive and library, and e-mail and the Internet have served to make

the world smaller and allowed these institutions to serve a broader user base. This study provides a profile of the types of remote users contacting one archival institution, as well as a look at how e-mail and the Internet have changed reference correspondence. It has only revealed the tip of the iceberg as far as how new technologies will change the ways that archival material is researched and used. The future of such rapidly changing technology cannot be predicted with much certainty, but the information provided here can help archivists and librarians anticipate new directions in remote research and better serve their users.

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Appendix A: Data Collection Sheet

Reference Correspondence Number: _____

Demographic characteristics:

Person name: _____
 Date: _____
 Profession: _____
 Location: _____
 Correspondence type: _____
 Items involved: _____

Purpose of letter:

☐ Personal/Recreational ☐ Academic ☐ Professional ☐ Avocational ☐ Unknown

Type of requests:

☐ Teaching
☐ scholarly research/writing/etc.
☐ Class project/student research
☐ Genealogy
☐ Primary/secondary school work
☐ Not research related
☐ request for permission to publish
☐ Unknown
☐ Other: _____

Object of inquiry:

☐ Specific subject
☐ Specific (known) items in a collection
☐ Specific collection
☐ General holdings/policy information
☐ Request does not relate to SHC
☐ Other: _____

SHC response:

☐ Sent reproductions/information on reproducing (Form B-3)
☐ Provide bibliographic information
☐ Provide narrative information
☐ Suggested visit
☐ Referral
☐ Cannot help

☐ No response/response not recorded
☐ Need more information
☐ Suggest microfilm through ILL (form A-28)
☐ Provide permission to publish (form B-3)
☐ Other: _____

Question formality:

☐ informal ☐ semiformal ☐ formal

Other Information:

Response time: _____ days

Number of exchanges: _____

Form letter A-32? ☐ yes ☐ noResearch Agreement filled out? ☐ yes ☐ noDid researcher come to SHC? ☐ yes ☐ noQuestion Negotiation? ☐ yes ☐ noMention of Web/online catalog? ☐ yes ☐ no

Description of exchange:

Appendix B: List of Collections Involved

Note: This includes only collections in the Southern Historical Collection and General and Literary Manuscripts. Not all collections could be identified from the information in the correspondence, so there may be other collections involved. It does not include collections from the University Archives or the Southern Folk Life Collection.

Collection Name	Call Number	Number of Requests
A. P. Watt and Company Records	#11036	12
Agnew: Samuel Andrew Agnew Diary	#923	1
Alcorn: James Lusk Alcorn Papers	#5-z	1
Alexander: Edward Porter Alexander Papers	#7	8
Alison: Joseph Dill Alison Diary	#3267	1
Allan: William Allan Papers	#2764	1
Allen: Cornelius Tacitus Allen Papers	#12	1
Allen: William Allen Order	#2781	1
Allen: William C. Allen Papers	#3523	1
Allensworth: Emma H. Allensworth Diary	#3214	1
Ames: Jesse Daniel Ames Papers	#3686	1
Anderson: Edward C. Anderson Papers	#3602	3
Andrews: Alexander B. Andrews Papers	#2412	1
Andrews: George Reid Andrews Papers	#4184	1
Andrews: Mildred Gwin Andrews Papers	#4436	1
Arledge: Grant Arledge Papers	#4913	1
Armstrong Family Papers	#4194	1
Armstrong: James Trooper Armstrong Papers	#3942	2
Arnold: Richard D. Arnold Papers	#1261	1
Asbury: Samuel F. Papers	#2677	2
Atkins: James Atkins Papers	#32	1
Attmore: William Attmore Papers	#3607	2
Bacot Family Papers	#916-z	1
Ball: John Ball and Keating Simons Ball Books	#1811	1
Barry: John Alexander Barry Papers	#3015	1
Bartlett: J. S. Bartlett Recollections	#46	1
Battle Family Papers	#3223	2
Bear Creek Baptist Church Records	#3124	1

Collection Name	Call Number	Number of Requests
Beard, Grace Pierson James. A Series of True Incidents Connected with Sherman's March to the Sea Manuscript	#2799	1
Beatty: Taylor Beatty Books	#54	1
Beckwith Family Papers	#1267	1
Bennette: J. Kelly Bennette Papers	#886	1
Benson: Barry Benson Papers	#2636	1
Bernstein: Edward M. Bernstein Papers	#4502	1
Berrion: John McPherson Berrion Papers	#63	2
Berry: Mary E. Strayhorn Berry Papers	#65	1
Betts: A. D. Betts Papers	#3173	1
Biggs: Herman Biggs Papers	#2351	1
Biggs: James Crawford Biggs Papers	#4299	1
Blanchard: Elizabeth Hooper Blanchard Papers	#3367	2
Boatwright: Thomas Frederick Boatwright Letters	#73	1
Bondurant: Emily Morrison Bondurant Papers	#2430	1
Bonner: Herbert Covington Bonner Papers	#3710	1
Bonner: Macon Bonner Papers	#3758	1
Bradbury: Charles William Bradbury Papers	#3011	1
Bradford: Henry Bradford Hymn Book	#3447	1
Bragg: John Bragg Papers	#2573	1
Branch Family Papers	#2718	1
Breckinrdige Family Papers	#1311	1
Brevard and McDowell Family Papers	#86	1
Brevard: Thomas Brevard Notebook	#85	1
Bridgers: Ann Preston Bridgers	#4105	1
Broadnax: John Wilkins Broadnax	#89	1
Brooke: John M. Brooke Papers	#3208	1
Brown, J. Smith. Individual Record of J. Smith Brown, Colonel, 126 th New York Volunteers, August 1864 Manuscript	#3733	1
Brown: John Judson Brown Papers	#93	1
Browne: R. H. Browne Papers	#95	1
Buchanon: Mrs. William Buchanon Papers	#98	1
Buck: Irving A. Buck Papers	#3361	1
Bullock and Hamilton Family Papers	#101	1
Bullock Family Genealogy	#2676	1
Bunker: Chang and Eng Bunker Papers	#3761	1
Burgwyn Family Papers	#1687	3
Burke: Thomas Burke Papers	#104	1
Burton: Robert Burton Papers	#3913	1
Butler: Marion Butler Papers	#114	2
Cameron Family Papers	#133	5
Campbell: John Lyle Cambell Papers	#m-1491	1

Collection Name	Call Number	Number of Requests
Campell Family Papers	#135	1
Campell: John Charles and Olive Dame Campell Papers	#3800	1
Cannon: Mrs. Ruth C. Cannon Papers	#2551	1
Capehart Family Papers	#1494	1
Carmack: Edward Ward Carmack Paper	#1414	4
Carter: David Miller Carter Papers	#143	1
Caruthers: Robert Looney Caruthers Papers	#1416	1
Cates Family Papers	#4341	1
Cheairs and Hughes Family Papers	#4226	1
Cheves and Wagner Family Papers	#147	1
Chew: Francis Horton Chew Papers	#148	1
Chotard: Eliza Williams Chotard Autobiography	#1193	1
Claiborn: John Francis Hamtramck Claiborne Papers	#151	3
Claiborne: Thomas Claiborne Papers	#152	1
Clarke: William J. Clarke Papers	#153	1
Clitherall: Caroline Eliza Clitherall Diaries	#158	1
Cobb and Hunter Family Papers	#1745	1
Cobb Family Papers	#4008	1
Cobb: Thomas Read Rootes Cobb Letters	#2458	1
Cocke Family Papers	#2759	1
Cocke: Harrison Henry Cocke Papers	#1587	1
Colcock: W. N. Hudson Colcock	#162-z	1
Coleman: D. Coleman Diary	#3317	1
Coles: Robert Coles Papers	#4333	1
Coleston: Raleigh Edward Colston Papers	#2574	1
Collier: Elizabeth Collier Diary	#1335	1
Comer Family Papers	#167-z	1
Comer: Laura Beecher Comer Papers	#169-z	1
Confederate Papers	#172	1
Coon: Charles L. Coon Papers	#177	1
Cooper: Thomas Cooper Papers	#1786	1
Cornish: John Hamilton Cornish Papers	#1461	1
Cotten: Elizabeth Henderson Cotten Papers	#1650	1
Couch: William Terry Couch Papers	#3825	2
Currie: Claude Currie Papers	#3841	2
Dabbs: James McBride Dabbs Papers	#3816	1
Dabney: Charles W. Dabney Papers	#1412	2
Dakwins and Henry Family Papers	#4220-z	1
Daniels: Jonathan Daniels Papers	#3466	2
Davidson: Theodore Fulton Davidson Papers	#893	1
Davie: Preston Davie Papers	#3406	3
Davie: William Richardson Davie Papers	#1793	1

Collection Name	Call Number	Number of Requests
Davis: Elias Davis Papers	#2496	1
Dawson: Nathaniel Henry Rhodes Dawson Papers	#210	4
De Rosset Family Papers	#214	1
DeMilly: Marie Louise Morris DeMilly Recollections	#214	1
Dewey: George Stanley Dewey Papers	#4390	1
Dillon and Polk Family Papers	#1668	1
Dixon: Susan Bullit Dixon Correspondence	#224-z	1
Donnell: Allan Thurman Donnell Papers	#4384	1
Dromgoole: Edward Dromgoole Papers	#230	2
Duncan and Johnston (Savannah, Ga.) Account Book	#2905	1
Dundas: William Oswald Dundas Papers	#4082	1
Dunn: Emma Henderson Dunn Papers	#1867	1
Elliott and Gonzales Family Papers	#1009	2
Emmett: Burton Emmett Papers	#3418	2
Ervin: Samuel James Ervin Papers	#3487	3
Erwin: George Phifer Erwin Papers	#246	1
Faison: Henry Wilson Faison Papers	#3789	1
Farley Photograph Album	#2178	1
Federal Soldiers Letters	#3185	2
Federal Writers' Project Papers	#3709	5
Firebaugh: Samuel Angus Firebaugh Diary	#3109	1
Fishburne: Clement Daniel Fishburne Letters	#1937	1
Forwood: W. Stump Forwood Papers	#260	1
Friend: Charles Friend Papers	#2547	1
Gaillard and Dubose Family Papers	#1815	1
Gale and Polk Family Papers	#266	1
Gales Family Papers	#2652	3
Galyean-Munchus Family Papers	#4604	1
Gardner: Oliver Max Garder Papers	#3613	2
Garrett: Thomas Miles Garrett Diary	#1171	1
Gaston: William Gaston Papers	#272	1
Gastonia Gazette Correspondence	#3867	2
Gautier: Thomas N. Gautier Papers	#273	1
Gegner: George Gegner Letter	#3366	1
Giles Family Papers	#3391	1
Gillespie and Wright Family Papers	#275	1
Gilmer: David J. Gilmer Papers	#4337	2
Gilmer: Jeremy Francis Gilmer Papers	#276	1
Gilpin Family Papers	#4535	1
Globe Church (Cadwell Country, N.C.) Record Book	#2308	1
Gordon Family Papers	#2235	1
Graham: Frank Porter Graham Papers	#1819	4

Collection Name	Call Number	Number of Requests
Graham: James Graham Papers	#2024	1
Graves: Charles Iverson Graves Papers	#2606	1
Gray: Charles Carrol Gray Diary	#2659	1
Green: Duff Green Papers	#993	2
Green: James E. Green Diary	#2678	2
Green: Paul Green Papers	#3693	4
Grimes Family Papers	#3357	1
Grimes: Bryan Grimes Papers	#292	1
Grundy: Felix Grundy Biographical Sketch	#294-z	1
Guerrant: Edward O. Guerrant Papers	#2826	1
Gwaltney: William Robert Gwaltney Papers	#1636	2
Hairston: Peter Wilson Hairston Papers	#299	2
Hairston: Robert Hairston Papers	#1148-z	1
Hall: James Iredell Hall Papers	#302	2
Hall: James King Hall Papers	#1563	3
Hamilton: Eli Spinks Hamilton Papers	#3226	1
Hamilton: James Hamilton Papers	#1489	1
Hanner: Oroon Alston Hanner Album	#4853-z	1
Hanvey: George M. Hanvey Papers	#3715	1
Hardee: Charles T. H. Hardee Reminiscences	#307	1
Hardie Family Papers	#1879	1
Hardison: Osborne Bennett Hardison Papers	#3554	1
Harnett County (N.C.) Papers	#312	1
Harris Family Papers	#879	1
Harvey: George M. Harvey Papers	#3715	1
Hassell: Cushing Biggs Hassell Papers	#810	2
Hawkins Family Papers	#322	1
Henderson: Maude Truxton Henderson Papers	#4311	1
Henderson: Archibald Henderson Papers Relating to Family History	#3650	1
Herring: Harriet Herring Papers	#4017	1
Heustis: Rachel Lyons Heustis Papers	#1200	1
Hill: Frederick Jones Hill Papers	#2469	1
Hobbs and Mendenhall Family Papers	#2493	1
Hodges: Luther Hartwell Hodges Papers	#3698	1
Holmes Family Genealogy	#2457	1
Hooper: Walter McGehee Hooper Papers	#4236	1
Horton: George Moses Horton Poem	#4799	1
House: Robert Burton House Papers	#3581	1
Hubard Family Papers	#360	2
Hughes: Clyde Hughes, Collector, Papers	#4819	1
Huguenin and Johnston Family Papers	#2439	1
Iredell: James Iredell Papers	#365	1

Collection Name	Call Number	Number of Requests
Iron Station (N.C.) Papers	#4073-z	1
J. M. Dent and Sons Records	#11043	10
Jackson: Garrie Jackson Papers	#4778-z	1
Jefferies: Robert M. Jefferies Papers	#3068	1
Jennings: Talbot Jennings Manuscript	#11046-z	1
Johnson: Clyde Johnson Papers	#4642	1
Johnson: William Johnson Papers	#380	1
Jones Family Papers	#2884	2
Kauffman: Joseph Franklin Kauffman Diary	#3110	1
Kelsall: Roger Kelsall Letter	#2419-z	1
Kennedy: Mary Hunter Kennedy Papers	#3242	1
Key: David McKendree Key Papers	#2261	1
King: James Moore King Memoirs	#3604	1
King: Mitchell King Papers	#400	1
Kirby-Smith: Edmund Kirby-Smith Papers	#404	6
Kitchin: Claude Kitchin Papers	#406	1
Kuralt: Charles Kuralt Papers	#4882	1
Kurtz: Greg Kurtz Books	#3103	1
Labaree: Benjamin Labaree Papers	#2625-z	1
Lafayette: Marie Joseph Paul Yves Gilbert Du Montier, Marquis de Lafayette Papers	#2048	1
Lamar: L. Q. C. Lamar Papers	#2219	1
Lash: William A. Lash Papers	#3900	1
Lay: Henry Champlin Lay Papers	#418	1
Leach: Calvin Leach Diary and Letters	#1875-z	1
Leake Family Estate Papers	#1250	1
LeConte: Emma LeConte Diary	#420	1
Ledbetter Family Papers	#421	1
Lee: Mrs. J. Hardy Lee Letter	#2628	1
Lenoir Family Papers	#426	1
Lewis: William Gaston Lewis Papers	#2314-z	1
Lineback: Julius A. Lineback Papers	#4547	2
Linn, Joseph Adolph Linn Papers	#3163	1
Linsay: Robert Goodloe Lindsay Papers	#3491	1
Lipscomb Family Papers	#429	2
Little: Benjamin Franklin Little Papers	#3954	1
Lockett: Samuel Henry Lockett Papers	#432	4
Love: James Lee Love Papers	#4139	2
Love: James Spencer Love Papers	#4240	3
Lowenstein: Allard Kenneth Lowenstein Papers	#4340	3
Lowndes: William Lownes Papers	#2778	1
Lacy: Drury Lacy Papers	#3641	1

Collection Name	Call Number	Number of Requests
Lyons, Clifford. Clifford and Gladys Lyons Collection of Robert Frost Materials.	#4429	1
Lyons: Peter Lyons Papers	#2378	1
Mackall, William Whann Mackall Papers	#1299	2
MacKinney: Loren Carey MacKinney Papers	#3665	1
MacLean: William C. MacLean Papers	#1579	1
Maffitt: John Newland Maffitt Papers	#1761	2
Mallory: Steven R. Mallory Diary and Reminiscences	#2229	2
Mangum Family Papers	#483	2
Manumission Papers	#1294-z	1
Martin: John S. Martin Papers	#3469-z	1
Martin: Julian Dwight Martin Papers	#3639	1
Martin: William Francis Martin Papers	#493	1
Mason: R. S. Mason Papers	#497	1
Massenburg: Nicholas Bryar Massenburg Papers	#908	1
McAlister: John Worth McAlister Papers	#4321-z	1
McBee: Silas McBee Papers	#2455	2
McBryde Family Papers	#2236	1
McCarthy: Denis Florence McCarthy Papers	#11011	1
McDowell: James McDowell Papers	#459	2
McDowell: Silas McDowell Papers	#1554	1
McFarland: Catherine McFarland Papers	#3515-z	1
McFarland: Francis McFarland Papers	#1465	1
McIntosh: David Gregg McIntosh Manuscript	#1889	1
McKay: Martha C. McKay Papers	#4836	1
McKenna: Richard M. McKenna Papers	#4156	1
McKinley: William McKinley Ledger	#M-1911	1
McLaws: Lafayette McLaws Papers	#472	1
McLeod: Neil McLeod Civil War Letters Manuscript	#4150	1
McReynolds: Samuel Davis McReynolds Papers	#1309	1
Mebane: Giles Mebane Papers	#500-z	1
Menken: Henry Louis Menken Papers	#3376	1
Middleton Family Papers	#3578	1
Miller: George Knox Miller Papers	#2525	2
Miller: John S. R. Miller Papers	#917	2
Miltenerburger: Christian Miltenerburger Papers	#513	1
Minis Family Papers	#2725	2
Miscellaneous Family Records	#2182	1
Miscellaneous Pictures, 19 th and 20 th Centuries	#4090	3
Moffitt: Elvira Evelyn Moltitt Papers	#519	1
Moore Family Papers	#2568	1
Moore: Martin Van Buren Papers	#520	1

Collection Name	Call Number	Number of Requests
Mordecai: George W. Mordecai Papers	#522	4
Morgan: John Hunt Morgan Papers	#2842	1
Morgan: William H. Morgan Papers	#2316	1
Morrison: Robert Hall Morrison Papers	#1131	1
Moses: Edward P. Moses Papers	#2065	1
Murphy: Edgar Garner Murphy Papers	#1041	2
Murray: Henry Spence Murray Letters	#3734	1
Nationsvank Records	#4780	1
New Bern Occupation Papers	#1993-z	1
New England Papers	#2833	1
New York State Miscellaneous Papers, 1782-1831	#1984	1
Niles: Jason Niles Papers	#950	1
Nixon: Alfred Nixon Papers	#4243	1
Noblin, Stuart. Papers Related to L. L. Polk	#3738	1
North Carolina Banking Papers	#550-z	1
North Carolina Miscellaneous Papers	#1135-z	1
North Carolina Poetry Society Records	#4606	1
North Carolina. Militia Records.	#536	1
Nutt: Leroy Moncure Nutt Papers	#2285	2
O'Neal: Alfred Moore O'Neal Papers	#1884	1
Odum Family Papers	#4447	1
Olmstead: Charles A. Olmstead Papers	#1856	1
Osbourne: Edwin Augustus Osbourne Papers	#567	1
Outlaw: David Outlaw Papers	#1534	1
Overman: Lee Slater Overman Papers	#570	1
Overton: John Overton Papers	#571-z	1
Page: William Nelson Page Papers	#1991	3
Palmer: William P. Palmer Papers	#1806	1
Paris: John Paris Papers	#575	1
Parker: John Johnston Parker	#3464	2
Parker: John Milliken Parker Papers	#1184	1
Parsley: Eliza Hall Parsley Papers	#576	1
Patton: James Welch Patton	#3971	2
Paxton: Thomas Preston Paxton Papers	#3886	1
Peabody: Herbert C. Peabody Papers	#3676-z	1
Pember: Phobe Yates Levy Penter Collection	#2232-z	1
Pendelton: William Nelson Pendleton Papers	#1466	1
Penn School Papers	#3615	7
Penniman: William Frederick Penniman Reminiscences	#2747	1
Person Family Papers	#590	1
Pettigrew Family Papers	#592	1
Pettigru: James Lewis Pettigru Papers	#1278	2

Collection Name	Call Number	Number of Requests
Phillips and Meyers Family Papers	#596	3
Pickens: S. Vance Pickens Papers	#890	1
Pierson: William Whatley Pierson Papers	#3929	1
Planters Banks of Savannah Records	#1256	1
Polhill: Emily Hines Nisbet Polhill Papers	#3009	1
Polk Family Papers	#4207	1
Polk, Brown, and Ewell Papers Papers	#605	2
Polk: Leonidas La Fayette Polk Papers	#3708	3
Powell: Charles Stephen Powell Reminiscences	#610	2
Powell: Daniel Augustus Powell Papers	#4364	1
Prescot: Helen M. Blount Prescott Papers	#1509	1
Preston: Margaret Junkin Preston Papers	#1543	1
Price Family Papers	#2850	2
Price: R. Channing Price Papers	#2571	1
Proffit Family Letters	#3408	2
Pugh and Gillian Family Papers	#1574	1
Pugh: James Thomas Pugh Papers	#1590	1
Quitman Family Papers	#616	3
Ramseur: John Ramseur Memorandum Book	#1567	1
Rankin: William Calvin Rankin Papers	#3717	1
Ransom: Matt W. Ransom Papers	#2615	2
Raoul, William Green. The Proletarian Aristocrat Manuscript	#3175	1
Raper: Arthur Franklin Raper Papers	#3966	1
Rawls: Eugene Rawls and Donald Seawell Theatre Collection	#3839	1
Reid: Rufus Reid Papers	#2712	1
Rencher: Abraham Rencher Papers	#627	1
Reston, James. Collection of Joan Little Trial Materials	#4006	1
Richardson: Francis Dubose Richardson Memoirs	#3010	1
Richardson: Frank Liddell Richardson Papers	#631	1
Rippy: James Fred Rippy Papers	#3845	1
Robbins: William McKendree Robbins Papers	#4070	1
Rollison: John W. Rollinson Papers	#3122	1
Roosevelt: Eleanor Roosevelt Letter	#3064-z	1
Roper: John Herbert Roper Papers	#4235	1
Royall: Kenneth Claiborne Royall Papers	#4651	1
Royster Family Papers	#4183	1
Ruark: Robert Chester Ruark Papers	#4001	1
Rubin: Louis Decimus Rubin Papers	#3899	1
Ruffin: Edmund Ruffin Papers	#638	1
Ruffin: Thomas Ruffin Papers	#641	1
Ruskin: John Ruskin Papers	#11022	1
Russell: Charles Phillips Russell Papers	#4004	1

Collection Name	Call Number	Number of Requests
Russell: Daniel Lindsay Russell Papers	#645	1
Sadleir: Michael Sadleir Papers	#11033	1
Salm: Mary Margaret Salm Papers	#4257	1
Sampson: Ira B. Sampson Papers	#3870	1
Sarratt: Celestine Sarratt Papers	#2870	1
Saunders: William Lawrence Saunders Papers	#2658	1
Schenck: David Schenck Papers	#652	1
Semple: Henry Churchill Semple Papers	#655	2
Sharpe: John McKee Sharpe Papers	#3592	1
Shaw: Ruth Faison Shaw Papers	#3835	1
Shenandoah County (Va.) Account Books	#2934	1
Sherred: John N. Sherred Papers	#4047	1
Shoffner: Michael Shoffner Papers	#4067	1
Singleton Family Papers	#668	1
Smallwood: Charles Smallwood Papers	#801-z	1
Smith: Betty Smith Papers	#3837	1
Smith: Josiah Smith Jr., Letter Book	#3018	1
Smith: Mrs. Seth L. Smith Papers	#3310	1
Smith: Peter Evans Smith Papers	#677	1
Southern Folk Cultural Revival Project, Inc.	#20004	1
Southern Historical Association Records	#4030	1
Southern Newspapers Publications Association Records	#4600	1
Southern Oral History Program Collection	#4007	13
Southern Tenant Farmer's Union Papers Records	#3472	1
Speculation Land Company Records	#2876	1
Springs Family Papers	#4121	2
Stamps: Mary Stamps Papers	#1453	1
Stanley: James H. Stanley Papers	#4065	1
Steel: John Steel Papers	#689	1
Stevenson: William Francis Stevenson Papers	#848	1
Stewart: Mrs. Francis B. Stewart Papers	#2774	1
Stoney and Porcher Family Papers	#m-823	1
Stout: Samuel Hollingsworth Stout Papers	#695-z	1
Stringfield: Lamar Stringfield Papers	#3522	1
Swain: David L. Swain Papers	#706	3
Swann Family Papers	#2829	2
Sydnor: Charles W. Sydnor Papers	#2864	2
Taliaferro: Alexander Galt Taliaferro Reminiscences	#1552	1
Tannenbaum: Samuel Aaron Tannenbaum Papers	#1920	1
Terry Family Papers	#1448	1
Tilghman: Tench Tilghman Diary	#991	1
Tillet: Gladys Avery Tillet Papers	#4385	1

Collection Name	Call Number	Number of Requests
Tomb: James Hamilton Tomb Papers	#723	1
Tompkins: Daniel Augustus Tompkins Papers	#724	1
Tripp: William Hentry and Araminta Guilford Tripp Papers	#4551	1
Trist: Nicholas Philip Trist Papers	#2104	5
Tucker Family Papers	#2605	3
Ulmer: Isaac Barton Ulmer Papers	#1834	1
Umstead: William B. and Merle D. Umstead Papers	#4529	1
Vaughan: Paul Turn Vaughan Papers	#3199	1
Venable: Charles S. Venable Papers	#2213	2
Vine Hill Academy Papers	#740	1
Waldrop: Richard Woolfolk Waldrop Papers	#2268	1
Walker: John George Walker Papers	#910	1
Walser: Richard Gaither Walser Papers	#4097	1
Walton: Thomas George Walton Papers	#748	1
Ware: Thomas Ware Diary	#1796	1
Waring: Joseph Frederick Waring Papers	#1664	1
Warren: Lindsay Carter Warren Papers	#3172	3
Watson: Thomas E. Watson Papers	#755	1
Weatherford: Willis Duke Weatherford Papers	#3831	1
Webb: Lewis Henry Webb Papers	#1767	1
White: Maunsel White Papers	#2334	1
Whitsett: William Thornton Whitsett Papers	#1899	1
Willard: Alfred E. Willard Correspondence	#1142	1
Williams: Maraguerite E. Williams Papers	#3102	1
Wills: William Henry Wills Papers	#792	1
Wilson and Hairston Family Papers	#4134	1
Wilson: Louis Round Wilson Papers	#3274	1
Winder: John H. Winder Papers	#915	1
Wirt Family Papers	#1704	1
Wood: John Taylor Wood Papers	#2381	2
Woodcock: John Steward Woodcock Account Book	#3139	1
Yansey: Bartlett Yansey Papers	#805	1
Young: John Freeman Young Papers	#808	1
Young: Joseph H. Young Papers	#3695	1