

HOW TO MAKE THE MOST OF YOUR MICROFORM COLLECTION

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We're here to address the topic of "How to Make the Most of Your Microform Collection." I know that these days, all the attention is on e-books, online journals, and other hot new technologies. Well, believe it or not, microforms were once the hot new technology. It was considered a great leap forward for a number of reasons:

- Microforms are a great space-savings over paper; even though some librarians now have space issues with their microforms – consider what it was like to carry bound volumes of broadsheet newspapers, or all those thousands of government documents in paper!
- In the 30's and 40's, when microforms were first widely marketed, acid-free paper hadn't entered the market; microfilm's longevity was a huge advantage to preservation
- Most importantly, microforms allowed for libraries to hold materials that were otherwise virtually inaccessible – such as rare books and manuscript source documents

Because of these advantages, many libraries made microforms an important part of the acquisitions budget. Just look around your average library, and chances are you'll see a microforms collection representing an investment of millions of dollars over the years. And because of the very advantages we discussed, that microform collection still has an important part to play in your library: it likely represents unique content, not online and not in your paper holdings, and it's probably still in good condition (particularly if the film was acquired after the 1960's).

The problem that many librarians report is that this fabulous resource is simply being under-utilized. Naturally, one would expect that younger patrons, who gravitate toward electronic resources, would be reluctant to use microfilm. But even veteran library users – like professors and researchers – are staying away.

To get to the root of the problem, I'd like to suggest two thoughts:

First – that some libraries make microform content hard to find.

Second – there's a perception that microforms don't work in the digital environment that many library users favor – it's an "old media" format which requires users to come on site and use specialized equipment. Microforms are not very appealing to library patrons accustomed to 24-hour pajama-clad access to information.

And the point of this talk is to cover ways to address both those issues.

The problems we've stated are familiar to most of us, but in practical terms, it boils down to this – most libraries have invested large amounts of money in a microforms collection, so what can be done to make that investment pay off, in terms of having patrons access that unique content?

Tinker and I would like to propose a number of solutions to help improve access to microforms, and to make the content more easily used in today's digital learning environment.

First, we'll cover some techniques to improve the visibility of your microform sets within the library catalog.

Then we'll cover how the latest generation of microform readers – which also serve as digital scanners – can improve the user experience with microforms, and also allow unique content in microforms to migrate to digital interfaces.

To begin with the catalog – as we mentioned earlier, in the past many libraries didn't bother to catalog microform sets. For one thing, it is an immense task – many microform sets contain thousands of titles; and cataloging from microform is almost always more difficult than cataloging from a book. You have to load the microform into a reader, and you have the accompanying difficulties of determining which AACR rules apply – is it a reproduction or a new edition? – plus determining the physical extent can be a challenge.

Also, microforms were often added to library collections in the days of mediated access – that is, when patrons were expected to rely on librarians to help them find information sources. In such a situation, it may have been reasonable not to catalog microforms, because the librarians would know to direct patrons to the microforms. But in these days when libraries encourage unmediated access – through OPACs, library websites, and the like – relying on patrons to seek out help in learning about microforms is simply a way of insuring that the microforms will not be used.

Let's look at the situation from a user's point of view.

In the earliest phases of microform acquisitions, many libraries expected researchers to consult librarians on the collection anyway, so they made the choice to catalog microform sets as a single entry, if at all.

And so a user winds up having this experience: finding a microform set in the catalog, he is referred to the microforms desk in the basement for further details. At the microforms desk, there's a binder which has a typed list of microform sets, cross-referencing the printed indexes which may be on a shelf by the microforms – or may be in the general collection with other books on the same subject. A very dedicated researcher might pursue this path, but many will just go home and Google.

I think it's safe to say that if the items in a microform set were cataloged at the title level, users would find them more easily. Each item in a microform set would have the same level of access as a book on the shelf.

Naturally, most libraries don't have the staff to dedicate to that much cataloging. But fortunately, libraries don't have to handle such cataloging in house.

In the 1980's and 1990's, a cooperative effort between microform publishers, major research libraries, and OCLC resulted in the production of MARC records for hundreds of microform collections. They are now available through OCLC, as part of the "WorldCat Collection Sets." This slide shows a very small sample, but as you can see, collections in all sorts of subjects, from American history to law to education to Nigerian linguistics already have MARC records ready to load into your catalog. And please don't take this as a shameless plug for UMI, because it applies to most microform publishers – but OCLC is not the only source for catalog records; many commercial vendors offer MARC records for microform sets as well. While there is a cost associated with acquiring catalog records from a vendor, it is typically far lower than the cost associated with cataloging the titles in-house.

Providing title-level cataloging for microform sets: it's a simple concept, but a little more complex to execute; however, there are plenty of resources available to make it happen in a library – and think of the increased visibility into your microforms.

A minute ago, we talked about the experience of searching in the catalog, only to be directed toward a paper finding aid. Those indexes and guides are essential, and libraries should make an effort to direct users to them.

But some patrons have the opposite experience with finding aids – they may locate a catalog record for the microform set, but with no indication of how to access the contents.

Or, in a way that may be confusing, the microform set and the guide are both cataloged, but the records may not contain an indication of how the items are related.

Those kind of experiences are also frustrating to a library user who may be wary of microforms in the first place.

To demonstrate a way to overcome this particular confusion, I'd like to use a couple examples from real catalogs to show how some libraries are helping patrons to find the complete set of information sources needed to access the content in microform sets.

Florida State makes use of the notes field to direct users to the printed guide that indexes a microform set. So a patron who finds the Food and Nutrition microform set will also know to pull the index off the shelves in order to find titles within the set. This is a way to cut down on these multiple steps that are so discouraging to researchers.

In some cases, microform sets have online finding aids. Here, Colgate University provides a link within the MARC record, so that patrons can immediately begin the search for content. From the MARC record for the Black Literature collection, a researcher can click on the link to the online guide, enter search terms in the online index, (right in these boxes, then press the search button) and be directed to the fiche number containing the material of interest. So

your user can keep her pajamas on right up to the point where she needs to pull the fiche off the shelf.

And those are some suggestions that changes in cataloging for your microform sets, like adding MARC records, and putting links to finding aids – print and online – can make the content in microforms more visible to your users and easier to search.

But aside from finding the content in microform, there's one other aspect of using microforms that remains a persistent discouraging factor – and this is the microform equipment. Many libraries have equipment that's 30 years old – it's dusty, creaky, has scratched lenses or screens, and has to be used in a dark corner. It's no wonder people don't like to use microforms.

Add on to that the fact that a user has to make out-of-focus 11x17 printouts, or take copious notes, and then go home and re-capture the material into their preferred digital framework, and it's often an I-can't-be-bothered situation for researchers thinking about using microforms.

But like everything these days, the technology of microform readers keeps getting better. Today's microform readers are not just lenses and bulbs – they're computer peripherals. Literally, they attach to a PC and use digital technology to reproduce the image from the microfilm on a monitor. As you can imagine, there are quite a few advantages to digital microform readers over the traditional model.

In the first place, younger library patrons have a comfort level with a digital interface that they might not have with a traditional microform reader. Often, the controls are manipulated with a mouse, so it's a very familiar feeling for computer users.

For the library, the digital reader solves the dilemma of finding space for microform readers. First of all, you don't need to have a dedicated darkened section of the room; the digital readers can work in full light; secondly, they are quite a bit smaller – the footprint of a digital reader is usually just a couple square feet, compared to 8-10 feet for a traditional reader; and third, when the reader is not being used for microforms, it can serve as a PC station – and there are never enough of those in most libraries.

But perhaps the most exciting feature of digital scanners is how much easier it is to read microforms using them. We're all familiar with murky, out of focus images on microform. Sometimes, to be honest, the documents were filmed with less care than should have been applied – but that has happened less often since national standards were created. But often, the microform is hard to read because the equipment has limitations in depth of focus, strength of illumination, or magnification. Digital readers can overcome almost all of those problems. With just a few tweaks in the software, what was nearly illegible becomes crystal clear. Allow me to demonstrate.

This image was taken from a 1920's newspaper advertisement for a new product called deodorant. On the left is the way it appears on a traditional reader – details are obscure, small print is swallowed in the shadows.

But look at it with digital enhancement – for the first time you can see that they're sharing a telephone, that he has a flower in his lapel, and the smudges in the background are gone.

Digital readers can also correct skewed images into upright frames. And don't worry about loading the film backwards or upside down. With the touch of a button, images can be mirrored, reversed, and changed from positive to negative.

Studying content using a digital microform reader is a much more pleasurable experience – sitting in a well-lit desk, instantly making the images legible, and easily zooming and moving the images forward and backward with a mouse. Digital scanners have proven to be quite popular in some libraries.

Obviously, we're not in the business of recommending models, but here are a few of the more popular digital microform readers. Price ranges for digital readers can be between \$5000 and \$15000, depending on the model and the features you get. Some of the more advanced features include remote access – users can log in to a web site and view the film on a machine located across the world, or auto-scan of an entire roll of film. You can even get digital readers to view opaque cards, ultrafiche, and aperture cards – all fairly rare types of microform.

Another important benefit to digital microform readers is that they are also scanners. That's right, they can capture images from the microform and store them on a computer, as a .jpg, .tif or .pdf file.

As we discussed earlier, one of the obstacles to use of microforms is that patrons really like digital information; well, with digital microform scanners, you can take that unique content in microforms and make it part of the digital environment.

For example, a professor (or more likely, a TA) can scan important documents in a microform set and load them into a courseware program, for students to access online. A great way to expose students to primary source materials.

Or a library can scan articles from microform and put them on e-reserves, so students can get ahold of them any time, without having to come in to the library.

Researchers using a microform set can instantly save files for later use at home or in their office, or share them with colleagues via email.

And, of course, the images in microform sets can be scanned for use in papers and presentations (like the image I used earlier.) As with any reproduction technology, libraries have to be careful about observing rules of Fair Use.

The important thing to remember about all these possibilities is that patrons who thrive in the digital environment don't have to be turned away by microforms – digital scanners now allow microforms to migrate into the digital world. Some judicious library marketing can help faculty, students and patrons make the connection between the unique content in the "old media" microform sets, and the digital

learning environment in which library users live today. With digital scanners, there's no excuse to avoid resources in microforms.

Well, I know we've covered a lot – from how and why microforms got started, to good ways to incorporate titles in periodicals holdings and catalogs, to how the latest generation of microform reader/scanners can help the digitally-oriented library user incorporate microform content into their research habits. Nothing works all the time, of course, but we hope some of our ideas and suggestions can help your library make the most of its investment in microforms.