

Creating Videos for Reference and Instruction

*Ellen Engseth, Curator, Immigration History Research Center Archives,
Head, Migration and Social Service Collections, University of Minnesota
Archival Practice, Volume 1, No. 2 (2014)*

Abstract

The author provides a case study of creating screencasts rendered as videos and disseminated as learning objects to support archival reference and instruction. These videos fit into a broader learning object experience at the University of Wisconsin - Milwaukee (UWM) Libraries. The project's context, implementation, and evaluation and recommendations are provided.

In reference work and outreach, our interactions with patrons are molded by variables, variables often undefined at our point of service. Patrons may be novice or experienced, confident or uncomfortable, eager or reluctant, bored or "archives curious." With nuance and skill, we manage all these variables and aim to create a good environment for the discovery, use, and analysis of archival material. Add to this the virtual component, with patrons increasingly offsite and working independent of archival staff mediation, and the situation becomes more complex. Common to all interactions is that the patron has some type of question for us, or for our materials. My approach to reference and instruction is to recognize and appreciate the variety and the variables. I enjoy locating that space and time where we are communicating well, and together matching archival sources to their information needs. Towards that end, I created a number of videos in hopes that they provide an additional method of effective communication between users and archives staff. These are meant to answer frequently asked questions, engage, and teach skills. Each video provides a different message about key aspects of researching with collections, and they serve as visual introductions to accessing material at University of Wisconsin - Milwaukee Archives Department. This case study will explain the context for these videos, their planning and implementation, and share results.

Context and Planning:

The Archives Department is a department of the UWM Libraries, the main library at the University of Wisconsin - Milwaukee (UWM). UWM is Wisconsin's largest public urban university, serving a student population of about 28,000. The UWM Libraries enjoys a physical location at the heart of the main campus, and strives to serve as the intellectual center of the campus and the wider community, including distance education learners and worldwide virtual users. Our mission is to advance the campus mission of teaching, learning, research and service by providing scholarly resources and services. We facilitate the discovery and exchange of ideas, and the creation, preservation, and sharing of knowledge. The Libraries help develop information-competent users. We connect our community of users with information, and the knowledge to succeed in a diverse society. Library vision includes expanding access, providing outstanding user-centered service, expanding academic partnerships, and leading in scholarly communication.¹

The Archives Department supports the UWM Libraries' mission by providing access to primary sources that have long-term research and instructional value for UWM academic programs. We also serve as the records management office for our parent institution. We actively teach archival skills and conduct outreach, and are open to the UWM community and to the general public. Many of our users are indeed members of the public, and a majority of these are Wisconsin residents. Public patrons often visit because of our identity as the Milwaukee Area Research Center. We participate in a long and successful inter-archives loan system called the Area Research Center (ARC) network, administered through the Wisconsin Historical Society and consisting of 14 ARCs located primarily at University of Wisconsin campus libraries. Each ARC serves a specific geographic region of the state. Patrons at one ARC request loans of collections housed at another ARC, for their temporary use. At UWM we loan and borrow many hundreds of archival containers each year, on behalf of our students, faculty, and public patrons.

Our primary clientele is our UWM learning community, and the library leads a campus initiative to address information literacy. Information literacy is a set of abilities requiring individuals to "recognize when information is needed and have the

ability to locate, evaluate, and use effectively the needed information.”² Many people in various library departments, including the Archives, participate in information literacy efforts and we all benefit from the skills of an Instructional Design Librarian, based in our library reference and instruction department. This librarian, Kristin Woodward, leads us in creating “learning objects,” which are reusable presentations, flexible, and intended to be used in multiple learning scenarios. A learning object holds its value in a variety of places, and a well-constructed learning object should solve an educational problem or extend knowledge. They are often packaged in a presentation format such as a digital video. UWM Libraries’ learning objects are largely designed to meet general information literacy goals and provide information about the library. When Woodward extended an offer to library colleagues that we consider building such learning objects to use with special collections or to assist with specific goals, I was very interested. We have educational needs to address, and the reusability of the product and its application to a variety of information needs seemed efficient. I began to plan to make a digital learning object, more specifically screencasts rendered as videos, to support archival reference and instruction.

At about this time, the Archives as a department had carefully considered our instruction program, including mapping often-taught skills to Association of College and Research Libraries information literacy competencies and outcomes.³ This group effort informed the video creation project, and I began planning with the broad instruction program in mind. My initial goal was to teach archival and information literacy skills in a video or two. Such a goal, I soon realized, was both too large and undefined for writing and creating an actual video. An instructional video, I learned, must be short, and is best designed with succinct and tangible goals. This is important in order to keep the attention of the viewer, and to provide accessible learning goals. So the project evolved into three shorter videos, each delivering different information pieces, teaching different skills, and working in cooperation. When viewed together, viewers could learn essential skills and receive key information.

These videos would be useful outside of teaching literacy and skills, as well. I was personally interested to see if this medium could deliver “that which works well in-person” to virtual reference services and instruction. After thousands of reference interviews, I know that it is possible to welcome, listen and inform simultaneously; a reference experience is at its best when both patron and archivist are comfortable, and engaged or learning. Could these videos present our department to online viewers in a manner similar to how staff greet visitors walking through our doors? Could they encourage and welcome, lessen any feelings of intimidation, and demystify the process of access? Certainly, the videos would answer frequently asked questions. In addition, they could serve us as knowledge management tools in assisting with reference work. As examples: a staff member may choose to show the captioned video to a hard of hearing patron, or invite an online chat patron to view one after the chat so as to reinforce a conversation. I often include an invitation to view the videos when writing a formal reply to a patron planning a research visit. A faculty member working with a student in their office can use a video to show the location of the Archives. The videos can provide quick refreshers for repeat users. And, they might simply inform the “archives-curious.”

Implementation:

I began the project by drafting a script or two, and discussing these with my Archives Department colleagues. My initial drafts were far too long and verbose; at this stage it was difficult to decide between what to include and what to exclude. There was so much important information to include! Two key developments helped me deliver truly usable scripts. Michael Doylen, Archives Department head, encouraged me to separate instruction into smaller, shorter videos, each teaching a portion of archival skills. The Instructional Design Librarian directed that each video was to have a succinct, stated, and manageable goal, and that I was to start each video with the most important information. After these important junctures in the project’s evolution, I wrote clear scripts which took form as three interrelated videos.

I aimed to write scripts with simple language, planning for a varied audience. I wrote with the minimum of “archival” terms, which I know are not necessarily understood by users. These included, for example, “processed,” a word I have found is often unnecessary and may indeed confuse. Also, various forms of archival description, and terms we use for them, are often confusing to non-archivists. In fact, one aim of mine was to define and demystify “finding aid,” a phrase heavily used by staff at the UWM Archives.

I was now at the point of learning the software to make the videos, and considering the viscosity of the videos. With three scripts in hand, I decided what images would provide the visual accompaniment to words and phrases. I plotted all out in a document and on a poster board, creating a “storyboard.” At this stage, Woodward provided invaluable skills in visual instructional design and with the technicalities of the software, Camtasia. Camtasia by TechSmith is an application for creating video tutorials and presentation, which allows for simultaneous audio capture. Camtasia allows for rendering of multiple media types, and the end product is thus a high-definition video. In our library, we use this software to create

durable, asynchronous learning objects. We also use the screenshot software Jing to create quick, on-the-fly, synchronous visual answers to questions. This stage of visual planning and basic Camtasia skill-building was time-consuming, commanding a considerable amount of time.

The Videos:

The resulting three videos are each about three minutes long and have distinct purposes. *Visit the UWM Archives'* goals are that the viewer feel welcome, and be prepared to do research. The goal of *Search for and locate materials at UWM Libraries' Archives* is that the patron can search effectively to locate pertinent sources for research. The goals of *What is a finding aid and how does it help me?* are for a viewer to understand the basics of a finding aid, and use it effectively.

Visit the UWM Archives is the most versatile of the videos, useful for a variety of applications and patrons. It is primarily an audio-visual guide to the department, providing a welcome and orientation. The message is essentially that one must physically visit the Archives to use collections. The video provides the basic information regarding a visit, outlining location, hours, and registration. (We do provide robust services to off-site patrons, but for the sake of brevity and a clear message to the targeted audience of the campus-based community, the video sends only this message.) Helpful staff, some rules and regulations, and the time typically involved with primary source research are also discussed. All these points answer frequently asked questions, or explain how we are different from the general library. *Visit the UWM Archives* was certainly the easiest video to create, due to my confidence regarding the information to include and the fact that it involved little information literacy instruction. Because we used only still photographs for the visual elements, this was technically the easiest to create in Camtasia.

At UWM Archives, collections are well described. In fact, the majority of our holdings are described in both a catalog record and a finding aid, and are discoverable through a variety of portals. In the second video, *Search for and locate materials*, I present basic search and interpretation skills for both catalog and finding aid records. One role of description is to provide for patrons' discovery without the mediation of archives staff. So, I aimed to teach basic skills which could empower users to virtually explore collections and to determine relevancy. The important points I stressed at the start of the video are simply that archival collections are described in written form, and that these written descriptions can be explored through specialized search tools. I presented the two portals we recommend for searching. These are our library catalog, and the statewide database called Archival Resources in Wisconsin (ARW). Our library catalog contains collection-level records coded in MARC; the database is a statewide consortium to which we contribute detailed finding aids encoded in Encoded Archival Description. Through screen captures and the narrative, I illustrate a few of the essential points to successful online searches.

As users' expectations for digital format material grows, we find it increasingly helpful to clarify that in our repository a small percentage of our holdings are born-digital or available in digital version. So the script also includes a statement that searches are conducted in descriptive phrases about contents of collections, rather than within digital source material itself. This video was the most difficult to make, because of the multitudes of skills it might illustrate and because two different search portals are presented. As a result, this video is the longest in length (and perhaps relatedly, the one with the fewest "views.") I closed this video by cross referencing the other two. I suggest viewing *Visit the UWM Archives* for more information on conducting research in a discovered resource. I also suggest the third video *What is a finding aid and how does it help me?* if one would like to learn more about that type of collection guide.

The goals of the third video, *What is a finding aid and how does it help me?*, are that the viewer gains a general understanding of a finding aid, and is able to effectively use it as a research tool. Though finding aids provide good detail to readers skilled in its structure and technical writing, some users find them laborious to read, or don't understand their value. So, the important point/s presented at the start of this video are that finding aids are written guides to archival holdings, and that they are used to determine relevancy and pinpoint pertinent source material. I then provide specific examples through screen shots and example searches. The challenge of this video was deciding which skills to concentrate on at the exclusion of others. Also, I chose not to explore every element of a finding aid, and briefly present most elements of *Describing Archives: A Content Standard's* single-level minimum description. I also discuss the Contents List element, which I find is most often useful to and requested by patrons. Towards the end of this video, I cross-reference the other two, as I did in *Search for and locate materials*. The broad message of the script is that the user can determine relevancy and understand location by considering all the information provided in the finding aid.

After finishing the videos, we loaded them onto the library-wide YouTube channel. YouTube was chosen as the host of our library videos for a variety of reasons. It is very much "where our users are," and the larger library trend at present is to "go where our users are." Also important, YouTube provides the service of creating an embed code. This generated code means

that our videos are a more reusable product; we use this code in our published library guides and our campus learning management system. Although we did not choose YouTube in order to rely on it as a discovery portal, we recognize it may be a route through which people find us. I provided a title and short description for each video; the description includes the intended goals. I also tagged each video with pertinent phrases such as “uwm archives,” “uwm libraries,” “finding aids,” “archival finding aids,” “information literacy,” “archival literacy.” And, as with other library videos, we marked these with the Creative Commons license, which allows for and encourages reuse by others.

Results and Lessons Learned:

The videos meet our internal goals, and when viewed completely they enable users to meet the stated learning goals. The videos present important aspects to discovering and working with our collections, and they serve as a welcoming visual introduction to the Archives Department. They are reusable, durable “learning objects,” deliverable and discoverable through various places including YouTube, our campus course management system, and library guides. Because of the strong collaboration with Woodward, the Archives’ videos have a place within a broader program to teach information literacy skills and to share information about the UWM Libraries. They thus contribute to our library mission and vision. Another important result is that we now have American Disabilities Act-compliant information sources about the Archives for the audio and visually impaired, complete with captioning and full transcription in English. In fact, this support for accessibility was another key reason Woodward chose YouTube as the host for our library digital learning objects; it supports our demand for closed captioning and facilitates accessibility.

In the early months of publication, colleagues and I found many occasions to use a video or three in a variety of reference and instruction settings. As mentioned above, I directed potential visitors to them as a means of introducing procedures and our reading room. I provided the videos to faculty colleagues, or to students in classes I’m working with, to supplement or replace personal instruction sessions. We have incorporated them into our internal training program, for use with our ever-evolving student staff.

Assessment is comprised of anecdotal evidence occurring at these points of service, and through statistics. The YouTube analytics and statistics are revealing. Views occur largely near publication date and at the times when we promoted through social media. It is very clear why the most important information must be at the start of the video: viewer retention past the midpoint is indeed low. The analytics category “Audience retention” clearly shows that while many may begin to watch your video, few stay with it through to the end. The average view duration of Visit the UWM Archives is 58 seconds, or 44% of the full video. Other analytics show discovery methods, top traffic sources, and geographic areas of viewings, and combinations of these. Visit the UWM Archives enjoys 324 views from 18 countries; audiences in Australia, Indonesia, Switzerland, Turkey and Canada viewed beyond one minute, while viewers in 9 countries including South Korea, India and the United Kingdom watched for less than 30 seconds.

Analytics for *What is a finding aid...* reveal a similar if smaller viewing experience. With 213 views to date, the average person watched for 1:05, or 39% of the video. Most views occurred in Australia and the United States, but it was the viewers in South Africa, Australia and the United Kingdom who watched for over one minute. People in Canada, Japan, and Germany who viewed the video did so for less than 30 seconds. *Search for and locate materials...* found four viewers in Poland, Switzerland and Australia, all who watched for the full duration of the video. Most views are from the United States; average view duration is 1:25. A very few views also occurred in Canada and Italy.

This retrospective of process and results provides clear direction for archivists interested in similar projects. First, I recommend finding partners and garnering support; the help for this project from Woodward and departmental colleagues was invaluable. I also strongly suggest keeping your video/s short and to a minimum of points. If a longer message is necessary, craft one out of many videos working in combination. Carefully consider the typically low viewer retention rate, and work to engage your audiences to counter this usual viewing behavior. Also, formally assess in order to gauge effectiveness and to plan the next-generation of learning objects. Strong assessment would likely lead to smart developments, such as a library of complementary videos on other often-discussed subjects. At UWM, for example, these might include the Wisconsin ARC transfer network, fair usage and copyright basics, distinguishing primary sources from secondary, and interpreting and using primary sources. Planning needs also to take into account the short life of digital learning objects such as these; though durable and reusable, within two to three years the UWM Archives will undoubtedly consider remaking or retiring these initial videos.

Until that time, my hopes are that the videos will be useful in ways both known and unknown. The video project was successful in that the UWM Archives has products that meet goals discussed above: as internal knowledge management products to assist us in effective communication with patrons; as friendly orientation pieces for both staff and visitors; and

as instruction tools. These three videos contribute to the library's "learning objects" offered to our local and wider communities, and it was most certainly an interesting and rewarding project to create them.

The author gratefully acknowledges early readers, and the support of her former colleagues at UWM Libraries where she was an archivist at the time of beginning this article. She has since moved to a position at the University of Minnesota Libraries.

Notes

1. "UWM Libraries Strategic Plan 2012-2017 (Public)" (UWM Libraries), accessed June 7, 2014, http://guides.library.uwm.edu/strategicplan_2012-2017.
2. "Information Literacy Competency Standards for Higher Education" (The Association of College and Research Libraries, 2000), 2, accessed June 7, 2014, <http://www.ala.org/acrl/sites/ala.org.acrl/files/content/standards/standards.pdf>.
3. Ibid.

Appendix

Transcript for *Visit the UWM Archives*

0:00

Hello and Welcome to the UWM Archives. To use the historical sources in the Archives Department of the UWM Libraries,

0:08

visit us in person. We are located on the 2nd floor of the West Wing of the Golda Meir Library building, in room 250.

0:18

Come through the double doors where you see the "Archives/Area Research Center" sign.

0:22

We are called the Milwaukee Area Research Center because we are affiliated with the Wisconsin Historical Society.

0:30

We are open Monday thru Friday from 8 am to 4.30 pm, and,

0:34

when UWM classes are in session we are open until 6.30 pm on Wednesdays and Thursdays.

0:42

Be sure to bring a photo ID with you for registration purposes.

0:45

All patrons must register with us and show identification.

0:50

We recommend that you give yourself at least an hour to work with the primary sources in the Archives.

0:55

Primary source research is time consuming but satisfying.

1:00

If you not already identified sources for your topic, we will be happy to help you.

1:05

Be prepared to tell us something about your research or your assignment.

1:09

You will find it helpful to conduct some research on the general history regarding the era or people who interest you,

1:16

before attempting to work with primary sources.

1:19

After identifying sources relevant to your research, we will complete a call slip and page the materials for you.

1:26

We bring the materials right to your desk in our Reading Room.

1:30

When working in the Reading Room, you will be asked to follow some basic rules in order to

1:35

protect the integrity and physical condition of the collections.

1:39

These include no food or drink, or pens or highlighters.

1:44

Please handle materials carefully. As with many Reading Rooms, you will be observed while you work.

1:51

Although items may not be checked out, in many cases you are welcome to make copies for your personal use; ask us for details.

1:59

Feel free to bring a laptop or camera.

2:02

Let us know if you have any questions; our staff know our collections very well and are always happy to work with you.

Transcript for *Search for and locate materials at UWM Libraries' Archives*

0:03

Hello and Welcome to "How to search for and locate archival materials."

0:05

Archival collections are described in catalog records or in finding aids, and are thus discoverable through search tools.

0:13

The two search tools explained here are the portals for you to discover and read about the collections at UWM Archives.

0:20

They are the library catalog, and a database called Archival Resources in Wisconsin.

0:26

Both the library catalog and the finding aids database are available to you on the Archives' main webpage.

0:32

Note that in all your searches, you're not searching the actual contents of a collection; but rather, searching in descriptive phrases about those contents.

0:41

You will need to visit the UWM Archives in order to view the sources and determine their relevancy to your research.

0:48

In the center of the webpage, under "Research," there are three tabs with search boxes.

0:53

Start with the "Catalogs" section, and enter key term/s which relate to your research topics.

1:00

You are now searching in the library catalog for materials available through the Archives.

1:07

Most or all of your results refer to archival collections.

1:12

These catalog records describe a collection as a whole. Read the catalog records for the title and author of a collection, the span dates, and a summary of the

1:23

material. If the collection interests you, make note of the title or call number. Visit the Archives to view the actual collection.

1:31

In addition to the library catalog, most of the Archives' collections are described in finding aids, which are written guides to archival records.

1:41

Click on the middle tab labeled "Finding aids" under "Research."

1:45

The search box shown provides a simple search.

1:48

Here, use one representative word, or if you are absolutely sure of the correct wording of a phrase, type in that phrase.

1:55

This search box is a simple and literal search, and won't find you variances of your phrase unless you direct it to.

2:03

In this example, I am asking for variations of the word synagogue, by using the asterisk at the end of the word.

2:12

I see 9 different results, representing 9 different archival collections which have something to do with synagogue or synagogues.

2:20

Alternatively, you can do an “Advanced search” also known in this search tool as “Boolean search.”

2:27

This option is smart if you are working with common words, a combination of ideas, or are not sure of the exact order of words in a phrase.

2:36

Here I am using three words which represent my research question: does the UWM Archives have any records regarding gay activism on the issues of AIDS?

2:53

The results show 4 different finding aids, each of which includes the 3 words.

2:55

For more on how to read a finding aid, see the video “What is an archival finding aid and how does it help me?”

3:01

Once you’ve identified sources that may be relevant to you, next visit the Archives to view the actual collection.

3:08

From the database, make note of the titles or call numbers, and any details. For more on using the Archives, see the video

3:17

“Visit the UWM Archives.”

Transcript for *What is a finding aid and how does it help me?*

0:01

Hello and Welcome to "What is a Finding Aid, and how does it help me?"

0:05

Finding aids are written guides that describe archival records, which are often called collections.

0:11

You read finding aids - or search within them - to locate source material that is pertinent to your topic.

0:19

This is an example of a finding aid for an archival collection at UWM; many finding aids in the state of Wisconsin look like this one.

0:29

Archival collections can be large or small, or varied in content.

0:33

So a finding aid summarizes a collection and describes it, helping you determine whether it is relevant to you.

0:41

It also guides you to the portion of a large collection that contains that material you wish to use.

0:48

Finding aids include: A formal title, and a date, or span of dates

0:53

A call number, which is often comprised of words as well as numbers

0:58

The creator of the records

1:00

The size or extent of collection

1:03

The location

1:05

The abstract, or scope and content note, which summarizes the material and gives you some sense of the information found in the collection

1:13

Any restrictions, or conditions of use are explained

1:17

Archival actions such as acquisition are available in most finding aids

1:22

And, most provide a contents list.

1:25

The contents list is a detailed inventory, which provides us useful searchable words or phrases,

1:31

and functions as a physical guide to the collection.

1:35

Read all together, the sections of a finding aid gives you an understanding of the context,

1:41

range, and scope of the materials.

1:43

Because archival description is narrative, you can keyword search in a finding aid to "discover"

1:49

references to material which might be pertinent to your research.

1:54

Here, for example, I am searching within the finding aid for written references to the phrase

2:02

"school breakfast" because that is really what interests me, and I want to locate sources on

2:07

that topic within Hunger Task Forces' own files.

2:11

Note that your searches are not of actual contents of a collection;

2:14

rather, they are searches in descriptive phrases about the contents.

2:19

Once you've identified sources that may be relevant to you, next visit the Archives to view the actual collection.

2:25

Make note of the title or call number, and any boxes or box numbers that you wish to see.

2:32

To learn how to locate pertinent finding aids in search tools, see the video "How to search for and locate archival material."

2:41

To learn more about visiting the Archives at UWM Libraries, watch "Visit the UWM Archives."