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Supplementing Traditional Documentation with Oral History:

Capturing Institutional Knowledge at Oregon State University Libraries

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RACHAEL DAVIS joined the Guin Library (one of OSU's branch libraries located at the Hatfield Marine Science Center campus) in August 2016 as Library Technician 3. Rachael came from Stanford University, where she was a Circulation and e-Resources Supervisor at the Engineering Library. She earned her Master's in Library Science from San Jose State University in 2016 after attaining a BA in Liberal Studies. She has been working in the library field for over 13 years in various roles and has been actively expanding her knowledge at Oregon State.

Over the summer of 2017, I had the unique pleasure of documenting the workflow of a retiring serials technician who had been at Oregon State University's (OSU) Valley Library in Corvallis for nearly 37 years. During her tenure, she took part in no fewer than seven online database system transitions and created a one-of-a-kind serials check-in workflow for each new system with her magic red binder. She once told me that, with that binder, she could navigate any new system because the basics of serials were always the same; it was just a matter of learning the new language and finding how those basics fit into the new system.

Now, as you can imagine, being in a job for over three decades leaves one with quite a bit of institutional knowledge. From my perspective, I knew that it would be easy to get the basics down onto paper. What concerned me was losing the historic memory and organizational culture of this long-term staff member—the kind of knowledge that collected files and documentation just don't cover. It's important for new employees to know why certain processes are followed, the history of the technical services department, and how things came to be in their current state. I'm not saying that libraries have to keep doing things the same way. But there is certainly something to be said about having a bit of narrative and contextual history when a fresh set of eyes looks at traditional practices and procedures.

I knew I needed to understand and preserve the various aspects of the serials technician's job, and I needed to come up with a plan fast—because not only was she a fast talker, but she was also leaving in just a few months! To complicate the matter further, I work at OSU's Marilyn Potts Guin Library at the Hatfield Marine Science Center in Newport, Oregon, a branch of the Oregon State University Libraries. The Marilyn Potts Guin Library houses the research and teaching collection of OSU's Hatfield Marine Science Center (HMSC). The Guin Library serves the OSU community at HMSC, along with the federal and state agencies located on the campus and the general public.

One of the main reasons working at a branch library made things so complex was that it wouldn't be possible for me to simply walk over to the serials technician's desk and clarify



things whenever I had a question; Corvallis and Newport are nearly 50 miles apart! So, necessity being the mother of invention, I came up with a plan to use a tape recorder in my interactions with the soon-to-be retiree. My inspiration came from an off-hand remark from one of her former colleagues, who expressed how hard it would be to preserve her vast knowledge given her rapid conversation speed.

I ran the idea of incorporating a tape recorder into the project by her supervisor, who was fine with it but cautioned that my colleague would need to give her consent as well. Before our first documentation session, I went to the main library in Corvallis and headed to the Student Media Services desk to check out an audio recorder. Despite the technician's initial hesitance, when I explained it was to help supplement the documentation we were creating, as well as to capture all of the rich institutional knowledge that she had acquired over the years, she warmed up to the idea.

My colleague and I met about once a week and as our sessions progressed, certain difficulties arose. First off, I found that while the audio recorder from the Student Media Services was a tremendous resource, using it presented a number of hurdles. To start, I had to calculate the time it would take me to check it out, negotiate the renewal date so I could hold onto it until the next week's session, ensure that I specifically received the recorder *with* the kickstand, check to make sure that the included SD card was big enough, and then set it up for my recording session. After that, I had to make certain that I successfully retrieved all of the data from the SD card before starting the whole process over again at the following training session.

After a few weeks of this process, Guin's former head librarian came by to drop off some magazines. As I was talking to her about my project, I explained that I was collecting all of this data via conversational sessions with the technician, and that I was thinking about how to get the sessions transcribed. She told me that one of the library archivists on the main campus was involved in an oral history project and encouraged me to email him to see where he normally got his recordings transcribed.

I ended up making an appointment with the archivist to talk in more depth about his process for developing the oral history project; following that conversation, I completely changed the workflow of my own endeavor. For starters, he let me use the audio recorder that he had used to record his oral history subjects. This meant I was able to save time and energy that I was previously expending at the



Tools of the project: the “magic red binder” and audio recorder.



Student Media Services desk. The archivist also showed me a way to index my recordings by subject so I didn't have to spend money (money we really didn't even have) for transcription.

Indexing the audio recordings generally consisted of several steps: devising a list of subject areas to index, listening to the recordings, writing down the timestamp where we started talking about a subject, and then incorporating the index under the audio file on a webpage. An index is immensely important, as it enables users to easily find what they need. The final step was to identify a location online where I could host my recordings. This location needed to be both easily accessible to anyone with the link as well as protected behind an authentication wall. Armed with this new knowledge, I felt much less daunted about how to make the data searchable—all without any kind of budget!

The other obstacle I needed to overcome was how to collaborate with my nearly-retired colleague on the project. At our institution, we use the online file sharing website Box as our collaborative space. It is a good way to work together on projects, but there was not a great deal of time for the longtime technician to learn a new system well enough to edit documents within Box's Microsoft Online feature. My workaround was simply to type up the handwritten notes I took during a session and bring those as printouts to our next session. We would go over these documents, and I would make edits as needed. It was a sometimes cumbersome and makeshift solution, but it worked well enough for the small amount of time we had. Having the recordings made the project feel less urgent, since I knew if I had any questions or needed to supplement anything after the technician was gone, I could simply reference the recordings.

Once I had a system down, it was fairly easy to get all the content we needed to document either on paper or archived digitally. It was a great learning process, and I am glad that I was able to collect so much institutional knowledge that might otherwise have been lost. While I haven't been able to create a virtual space for the recordings yet, the documentation has already been utilized by the new serials technician, and she is excited to know that there are recordings she can listen to that will help her better understand her new position.

Institutional knowledge is a precious thing to have at one's disposal, especially when working in isolation at a branch library. What might be common knowledge at the main library may not have been passed along to branch staff; it is indeed quite useful to have a dedicated resource for looking up a question quickly!

At OSU, it seems the great, much-discussed baby boomer retirement is finally in full swing. All positions are taking a hit, and it's important for libraries to get resourceful and intentional about how they collect and preserve institutional knowledge. Creating a deliberate retention plan along with vital documentation not only benefits all future staff but—just as importantly—preserves the library's history for posterity. Traditional documentation can get a new hire started. But, if you really want them to understand the whys and hows of a position, it is worth the time to sit with the outgoing employee (especially if the individual has held the position for decades) to capture and preserve the intricacies and tidbits that can only be acquired by conducting an oral history. Not only will this make your new employees come up to speed faster, it will also allow you the chance to formally record the unique legacy of your library's culture and history. Along with my colleagues, I'm very pleased with the outcome of my own efforts to preserve the institutional knowledge of OSU Libraries' long-time serials technician; I welcome the opportunity to share my strategies with others who are interested in embarking on such a project. 

