

‘The use of microforms in New Zealand public tertiary institutions’

by

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Submitted to the School of Information Management,
Victoria University of Wellington
in partial fulfilment of the requirements for the degree of
Master of Information Studies

May, 2011

For Mum & Dad

Abstract

Developments in the technologies available to libraries have precipitated a change in how library managers handle their collections, shifting focus from collection management to content management. Microform has been a tool of the research library for many years; the aim of this project is to discern whether the libraries of public tertiary institutions in New Zealand are still using and managing microform collections, and whether there is any perceived future for the medium.

Thirty three institutions' libraries were approached representing New Zealand's polytechnics, universities, and wānanga. Their collection managers were asked questions regarding their holding of microform, the management, promotion and use of those resources, and whether they see the technology continuing as a relevant medium. The results indicated that microform is generally only held in universities and wānanga; those resources generally receive no special treatment, and there is only a limited perceived future for the medium. The impacts of these findings are discussed, and opportunities for further research in this area are raised.

Keywords: Microform, Academic Libraries, Collection Management, Usage Studies.

Acknowledgements

This project represents the culmination of four years of study, and I would like to thank all those who have helped and supported me over that time.

Special thanks go to my wonderful wife Jen who has been so supportive of my endeavours over this time, despite the concurrent journey we have taken into parenthood over exactly the same period.

To my supervisor, Gillian Oliver; thank you for all of your advice, suggestions, and most of all your calm encouragement over this period. Your quick replies to whatever issue I encountered helped this process no end.

Thanks also has to go to my workplace, The University of Auckland Library, which has provided fantastic support for my studies and allowed me to work in a fascinating, challenging environment with so many wonderful people.

Lastly, thanks to all who responded to this survey. Taking time out from your work to answer these few questions is greatly appreciated, and I hope to return the favour should I be in a position to do so in the future.

William Hamill

19th May, 2011

VICTORIA UNIVERSITY OF WELLINGTON

School of Information Management

Master of Information Studies

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'The use of microforms in New Zealand public tertiary institutions'

(hereafter referred to as 'The MIS Research Project')

being undertaken by

William Gregory Hamill

in partial fulfilment of the requirements of the degree of

Master of Information Studies,

School of Information Management, Victoria University of Wellington.

Topic Commencement: **15 November, 2010**

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1: Introduction

The aim of this project is to investigate the current state of microform use in New Zealand's public tertiary institutions' libraries; to gauge whether this technology still holds a perceived place in the provision of library content. It will provide an overarching view of size, stability, threats, management practices and future directions of the medium.

Microform technology has been receiving ever increasing competition as a delivery medium for many years from various digital technologies, and is itself undergoing technology changes in methods of access with new readers integrating directly with a PC for operation, display, and image capture (American Library Association, 2011). Gathering information regarding current microform use will enhance the quality of decisions made by microform managers, regarding adoption and provision of the technology, by providing a view of the wider landscape in which their collection fits.

For the sake of brevity, the libraries which fall into the scope of this project will, from now on, be referred to as 'academic libraries'.

2: Definition of terms

Below are definitions of a couple of the terms used in the study:

- The term 'microform' used in the study is defined as:

"3. Any microphotographic information storage medium; a microphotographic reproduction on film or paper of a book, periodical, etc, requiring magnification to produce a readable image." ("Oxford English Dictionary," 2010)
- 'Public tertiary institutions' is a term adopted from the Ministry of Education spreadsheet listing educational facilities in New Zealand (Education Counts, 2010). This group contains all polytechnics, universities and wānanga

3: Research problem

For many years microforms have enjoyed a relatively secure niche in the academic library environment; it enabled institutions to gain access to manuscript and archival collections which would otherwise have been unavailable, as well as providing a space-saving medium for serials back catalogues. Microforms also gave the institutions a preservation option, enabling them to create film surrogates of fragile or valuable held items to be used in lieu of the original.

However, for all their advantages, microforms carried with them some significant disadvantages. The most notable issue confronting microform technology from the beginning was the struggle for acceptance by users (and often providers); the technology is not generally perceived as user-friendly. Also, as film viewing requires a special reader, usage statistics are often only obtainable via direct in-house surveys; items rarely pass through a circulation module, with the exception of the occasional interloan. Costs for storing, and providing access to, the content is also high; films and fiche should ideally be stored in specific, stable conditions, and all formats require some type of reader to illuminate and magnify the text.

The increase of availability of materials via digital media means increased competition for microform formats. Libraries now have the ability to buy CD or DVD-Rom, create and host content on in-house servers, or subscribe for access to online content from vendors. These newer technologies have the benefits of user appeal and improved searchability; although there are serious questions regarding the security and stability of these mediums they are not burdened with the stigma so often attached to film, fiche or card.

The problem is that microform collections represent a significant expense for the hosting institution; the objective of this research is to determine how academic libraries in New Zealand are managing their collections, and what viability do those institutions see for the technology in the future?

Microfilm collections represent a significant investment; not only should the films be stored in appropriate conditions, but there is also the added expense of

providing and maintaining the equipment necessary to view the material. The benefits offered by the medium in terms of content preservation, need to be balanced against the ease of access and appropriateness to the particular institution.

Collection decisions are increasingly required to provide evidential support (Kniesel, Wicht, & Connaway, 2006), and where the decision involves a current collection this is usually provided by some form of usage study.

Usage studies usually focus on a specific collection (e.g. studies by Altmann & Gorman (1999), McBride & Behm (2003), and Wagner (2007), and much emphasis is placed on the importance of such studies for informing the collection management process. Sykes (2009) raises the importance of statistics to library planning; the author also promotes the extending of usage statistics collection to other like libraries to add greater relevance to their meaning.

With digital initiatives increasingly being incorporated into the academic library environment, is microfilm still considered worth maintaining in a collection? An investigation of usage amongst like libraries would provide a useful indication of current trends and thinking within the sector.

4: Research questions

Managers of microform collections in academic libraries throughout New Zealand were surveyed to discover answers to the following questions:

- How are microform collections managed in the libraries of New Zealand's academic libraries?
- Is the use of microform technology being discontinued, substituted, or retained?
- To what extent has digitisation affected libraries decisions regarding microform collections?
- How well are existing collections used?
- What level of satisfaction is there with the medium?
- What is the perceived future for microform technology?

5: Theoretical framework

Bart Harloe and John Budd (1994) wrote an article at a time when libraries were encountering “deep technological changes”, with ever increasing availability of electronic materials via newly emergent electronic network technologies; the internet. They put forward the theory that as a consequence of new technologies and delivery options, librarians would be required to make a transition from the concept of collection management to that of *content* management in order to build and maintain a successful and relevant library.

Provision of access to content is most important to Harloe and Budd. The authors stress that the selection of a content delivery system, be it hardcopy or electronic, should be made with the needs and wants of the target audience in mind. If the users do not like or understand a particular medium they will be unlikely to use it.

Many authors agree with this position which has developed into the 'access versus ownership' debate. Laura Kane (2003) is one such author who believes that library users are "primarily concerned with whether they are able to locate information they need", she holds that only after the content has been selected should the container be considered.

Bee (2008) reacted to the theory of necessary transition to content management by expressing the belief that the views of Harloe and Budd lessen the significance of original objects, however this is debateable. The theory of content management expressed by Harloe and Budd in fact promotes the flexibility of choosing the best delivery option for an individual institution; however it recognises that the physical 'container' can hold particular importance, and in these cases the object itself becomes a form of 'content' and should be treated and cared for accordingly.

Works do not appear on microfilm in the first instance, nor is it a medium purchased purely for the sake of the 'container', yet for a long time libraries have invested in the technology as the primary tool for long term content preservation and also as an economic space saving option for content provision. In geographically remote countries like New Zealand microform has

enabled affordable access to primary source material which would otherwise have required extensive, and expensive, travel; it has also allowed copies of entire archival collections to be ordered and held locally.

How would the shift from collection, to content management affect microformat materials? Do they still have a place in content provision?

Researchers in the United States developed an instrument to survey microform librarians on the use of the technology (Naidoo et al., 2009) to discover the answers to just such questions. By applying the instrument to collections held in New Zealand's academic libraries we will be able to discover whether library professionals still view microform material as valid in today's library setting, and whether there is belief in its continuance as a useful tool in the management and delivery of content.

6: Literature review

This review of the literature focuses on the realm of usage studies. As mentioned earlier gathering statistics and gauging usage is an important part of the decision making process, and it is from an investigation of this field that the instrument devised to investigate usage of a technology over a number of libraries was developed.

6.1: Why focus on usage?

Decisions made regarding collections or content need to be well informed; whether the decision be regarding weeding for storage or disposal, or acquisition and provision of new materials, some form of support is usually required. More often than not this support comes from some form of usage study (Crosetto, Kinner, & Duhon, 2008).

The current economic climate increases the importance of evidential support for purchasing decisions (Knievel, et al., 2006), and can also be used as a tool for informing other management decisions such as optimising staffing levels in certain areas (Wagner, 2007); marketing and promoting of collections (Bordeaux, Kraemer, & Sullenger, 2005); identifying topics for focused bibliographic instruction (Best, 2007); and improving library website design (King, 2009).

6.2: Types of usage survey

Collection of usage data is broadly done in two ways; the study of circulation and form data, and the study of in-house use. Studying circulation statistics is straightforward and provides rich data on what is being used, and by whom. In-house use studies take a number of different forms, with the most prevalent being some variation of shelving study.

Although a shelving study may seem like a simple process there are many techniques employed when conducting this form of survey; some record every item re-shelved on an Excel spreadsheet (Harrington, 2006); others use modified versions of the method developed by Shaw (1978) which involved

marking the volumes in some way when shelving, and collecting the data at a later time. Shaw's method is popular due to its relative low cost, and can be adapted to show multiple uses by adding extra marks to the indication label at subsequent shelving (Altmann & Gorman, 1999).

Butkovich (1996) provides a sound overview of other possible methods such as: Non-use Studies, where markers are inserted into the stack in such a way that it would indicate if a title had been disturbed; Observed Behaviour, which involves finding and approaching users in the stacks and asking them questions regarding their use; and User Surveys. Some researchers believe surveys are underutilised when assessing use, particularly in terms of service improvements. Sykes (2009) outlines useful statistics to gather and emphasises the importance of asking users what they actually want.

Multiple methods are occasionally employed to get a fuller picture, such as investigating circulation data and interloan transactions (Thomson, 2002; Wagner, 2007).

6.3: Timeframes

Usage studies are conducted over various lengths of time, and are often designed to be repeated at intervals so trends identified (Holloway & Sutton, 1990; McBride & Behm, 2003; Wagner, 2007). Longer timeframes are considered preferable as they "even out the variations in use caused by the academic calendar" (Butkovich, 1996); a common period for a lengthy study is one year (Altmann & Gorman, 1999; McBride & Behm, 2003).

6.4: Typical subjects

Most in-house use studies focus on serials collection, however reference collections are also a popular subject for study (Crosetto, et al., 2008). These collections share the common aspect that they are generally non-borrowable.

6.5: Microform specific studies

Little research has been conducted on microform usage which seems unusual as there are physical factors present which simplify the process. The nature of a microform collection means it is generally isolated from the rest of the library, and readers cannot browse items at the shelf. Shepherd (2004) highlights the difficulty of gathering usage statistics for print resources compared to electronic resources simply because of the lack of control over users' access to the material; microform materials fall somewhere in between the two extremes, suggesting that results attained should provide a more accurate picture.

Usage of microforms can also be interpreted in a wider sense. In the early days of microform adoption in libraries many articles were written proposing to what uses the technology could be put (Hernon, 1977); in 2009 a group of researchers designed an instrument to test where institutions are now in their use of microform technology (Naidoo, et al., 2009); this followed from an earlier study by Manzo (1997) which focused on the nature of microform management within libraries.

6.6: Where that leaves us

The theory of librarians moving to a concept of content management can be explored, in regards to the microform medium, by surveying managers.

Investigating their collections, management processes, and belief in future viability, will provide an indication of the level of use of microform technology within those institutions, and an indication of whether it will likely be retained.

Being a medium which has existed solely as a preservation and access technology its place in the modern context of content delivery is worth investigating.

7: Ethical considerations, limitations, assumptions and bias

Every effort was made in the study to ensure respondents are aware of the nature of the project, and to protect their anonymity.

Respondents were approached either directly, if a contact was publicly available, or through the most appropriate contact available. The letter of introduction clearly laid out the nature of the research, and the manner in which it was to be undertaken.

The sole identifying question in the instrument only served to place the responding institution into one of the three targeted groups (polytechnic, university or wānanga); all following questions were of a general nature and did not require the provision of possibly identifying, or financially sensitive, answers.

Email addresses were only asked for should the responder wish to be provided with a summary of results, otherwise anonymity was further ensured by hosting the survey on Qualtrics, a third party survey platform.

7.1: Limitations

The two main limitations in this study was time and population size.

Limited time for the completion of the project mean the study needed to be relatively simple, to avoid complications and delays.

Studying a small population meant that to ensure a reasonable level of confidence in the findings a high number of replies would be required. An insufficient response rate would limit the ability to produce valid results.

7.2: Assumptions

There is an assumption in this study that the institutions responding to the questionnaire actually keep an eye on their microform collections. Microform resources have been identified as areas which can easily suffer from custodial neglect as they are overlooked for newer formats (Davey, 2009).

7.3: Biases

Researcher bias was limited from the survey by adopting questions from tested instruments. Both the Naidoo et al (2009) and the Manzo (1997) instruments have been tested to ensure the questions are not leading and care was taken when amalgamating the questions to ensure this fact is maintained.

As the surveyor is in fact a supervisor of a collection at one of the targeted institutions, the survey was offered to the manager of the Special Collections, in which the microform collection is housed, thus removing a personal bias in the results.

8: Paradigm

This research takes place within the positivist paradigm.

Positivism focuses on the collection of numerical data, and the statistical interpretation of that data (Cryer, [n.d.]). This paradigm is often criticised that it does not consider “the subjective states on individuals” (Dash, 2005) making it unsuitable for the social research study, however for the purposes of this project it is considered as discussed by Bryman (2008, p. 14); as a “descriptive category”.

The goal of the project will be to gather and interpret data regarding a specific phenomena – the Positivist approach is perfectly suited to this.

9: Methodology

The study adopted a predominantly quantitative methodology. Focusing on measurement; causality; generalization; and replication, the research process closely adhered to the main steps laid out by Bryman (2008, p. 141). This

methodology fitted well with the study as it aimed to provide a clear measurement of observations, or events (Balnaves & Caputi, 2001, p. 33).

Elements of Descriptive Research methodology also entered into this study. This approach aims to answer 'what is' style questions, like the quantitative methodology, yet also promotes flexibility in data collection and analysis ("Descriptive research methodologies," 2001).

The study employed a tested survey instrument focusing on a specific issue, the result of which was to provide valid, reliable data on the use and management of microforms in New Zealand's academic libraries; it set out to report the 'lay of the land', and provide a consistent yardstick for measuring results (Bryman, 2008, p. 144).

The essentially rigid nature of the quantitative approach was tempered by the descriptive research approach when the survey came to the final question, this method was utilised to explore the responses on the future prospects of the medium in more depth.

10: Method

The method employed in conducting this study was via a self administered survey offered to the relevant librarian at the selected institutions.

The survey instrument used has been largely adopted from the pilot study conducted by Naidoo et al (2009), and adapted to include further questions on policy, staffing, and monitoring as put forth in the study by Manzo (1997).

Hosted on the third party survey site Qualtrics, the instrument was quick and simple to complete and protected the anonymity of the respondent, and the specific institution. For the purposes of this study the only identifying factor required was indicating institution type: university, polytechnic or wānanga.

11: Population sample

For this study a Selective Method of sampling was employed. Specifically the sample is an Expert Sample, stemming from the Purposive Sampling Method ("Choosing a sampling method," 2010); the area to be studied is clearly defined, and access to the information is best provided by the people working with the target collections.

For the purposes of the study “expert” is defined as a manager of, or person responsible for, a collection of microforms at the targeted institution; should an institution not hold microforms, the respondent should be a member of staff authorised to comment on the library’s collection.

The initial population contemplated to survey was just the university libraries of New Zealand, as these institutions have large libraries and known collections of microforms; however as this would only provide a population of 8 it was considered beneficial to open the sample population up to include polytechnics

and wānanga, who also fall under the umbrella of the term “public tertiary institution” as defined by the Ministry of Education. All other tertiary education providers were excluded as their size and focus indicated that they would be unlikely to have a microform collection, or in some cases a dedicated library.

To identify the sample population the “Tertiary Directory”, a listing of institutions provided on the Ministry of Education website, was used (Education Counts, 2010). This directory was used to create a sample of 30 institutions by limiting the display to ‘Public tertiary institution’ in the ‘Authority’ column.

Once the institution list was generated searches of the institutions’ contacts lists were used to identify who should receive the invitation to take the survey. This process highlighted a couple of issues. The information table on the Ministry’s website did not reflect certain institutional mergers which occurred late 2010 and early 2011; consequently 2 listed institutions no longer existed independently and were excluded from the survey. Conversely, UCOL operates three distinct libraries in different centres so each library was approached independently. Finding specific contact emails also proved more problematic than expected; for many institutions only generic emails could be identified. A modified spreadsheet was created for the purposes of this study once these issues had been addressed (Appendix I).

Due to the small size of the target population all institutions in that population were offered the opportunity to complete the survey. Using the Sample Size Table offered by the Research Advisors website ("Sample size table," 2006), to

attain a 95% confidence rating with a 5% margin of error, 29 responses were required.

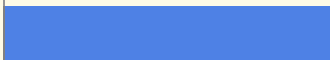


12: Results

The survey elicited 16 responses from the 31 institutions approached. Although that represented a fairly good response it fell well short of the high response rate needed to ensure a valid, reliable result for the survey. To attain statistical significance almost all of the institutions approached would have to have responded.

Consequently the analysis is a reporting of what results were received, which do provide a fair indication of the state of microform collections throughout the country in academic libraries.

Following are the survey questions and answers received. The answers are displayed in the form exported from the Qualtrics survey platform, and are followed by a brief discussion.

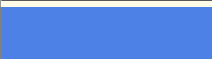

1. What type of tertiary institution are you?

#	Answer		Response	%
1	Polytechnic		10	63%
2	University		4	25%
3	Wānanga		2	13%
	Total		16	100%

This question represented the sole identifier for the survey. The benefit of asking this is that by viewing this response with that given in question 2 an impression would be given as to what type of academic institutions currently manage a microfilm collection.

Of the institutions to respond wānanga rated very high with 2 replies from the 3 institutions approached; next came polytechnics with 10 replies from 18 possible responders; last ranked the university responses with only 50 % of the institutions invited to take the survey responding. However, it was assumed that the universities in Canterbury would not respond as the survey was launched just after their reopening following the February 22nd earthquake.

2. Do you hold microform materials?




#	Answer		Response	%
1	Yes		6	38%
2	No		10	63%
	Total		16	100%

Defining who actually held microformat material is an important indicator and is the first instance of skip logic in the survey.

Most responders indicated that they did not hold microformat materials in their collections, those people were immediately taken to the end of the survey where they were asked their impressions of the format and its future viability, the 6 that replied affirmatively proceeded on to more in depth questions regarding their collection.

When view in conjunction with the answer to question 1 it show that the institutions that indicated no microform holdings were all the responding polytechnics. Although it was expected that the universities would indicate holdings, being such a long standing research medium, it is very interesting to learn that both responding wānanga indicated holdings.

3. What formats of microform are contained within your collection?

#	Answer		Response	%
1	Ultrafiche		0	0%
2	Microcard		1	17%
3	Microfiche		6	100%
4	Microfilm		5	83%

Question 3 provides a breakdown of the types of microformat material held at the institutions. Survey takers were asked to select all the formats which apply to their collection.

Microfilm and Microfiche are now the most common forms of microformat material. All responding institutions indicated holdings of microfiche, whereas 5 reported microfilm holdings. This result is somewhat surprising as microfiche is a format usually used for shorter publications, such as thesis or ERIC documents, while microfilm is more common for archival sets and serial/newspaper publications. It is even more unusual that the institution which reported only holding microfiche was a wānanga. Many Maori resources are

available in microformat but they tend to be on film, such as the Maori Land Court Minute Books.

One university reported holdings of microcard material. This format is a very early example of microform technology, where microphotographic images were printed on sheets of card. The format was superseded by microfiche as a much more durable option.

None of the institutions selected Ultrafiche as a held format. Ultrafiche is a highly reduced version of microfiche with a reduction ration in the range of 90x to 250x, and is predominantly used for publishing directories and large quantities of data (Wigington & Costakos, 1977). The absence of this format is somewhat surprising as it was expected that universities, and possibly some polytechnics, would hold such a form. However, being so similar to microfiche it is possible there are unrecognised items in the various collections.

4. Does your institution have a separate budget for microform material?

#	Answer		Response	%
1	Yes		0	0%
2	No		6	100%
	Total		6	100%



This question saw all respondents stating that there is no separate budget for the format. The inference here is that any microform material purchased would have to come from a general print acquisition budget.

5. Is the budget for microform material...?

#	Answer		Response	%
1	Increasing		0	0%
2	Decreasing		0	0%
3	Stable		0	0%
	Total		0	0%

This question was skipped in the survey as all respondents selected 'No' in the preceding question regarding separate budgets for microformat materials.





6. Has your institution replaced, substituted, or discontinued the use of microforms?

#	Answer		Response	%
1	Yes		1	17%
2	Partially		5	83%
3	No		0	0%
	Total		6	100%

The answers to this question indicate that there is a definite shift away from microformat materials.

All institutions taking part in this portion of the survey indicate some move away from microform technology, and one indicates that is totally moving away from the format.

7. If so, what reasons drove the decision to replace, substitute, or discontinue the use of microforms?

#	Answer		Response	%
1	User preference		3	50%
2	Cost of maintenance		1	17%
3	Cost of equipment		0	0%
4	Cost of microforms		1	17%
5	Other:		5	83%

Other:

creating collection

Online availability

Availability as electronic

Material now accessible digitally

outmoded format, electronic access to resources is far better



Here the responders were invited to select which reasons drove their decision to move to an alternative format.

It is interesting to see that only 50% cite 'user preference' as a reason. Attempts to engage library users with microformat technologies is identified in the literature as a major traditional hurdle of the format; users have generally found the format too difficult to use (Farrington, 1985). Rather, the most common

reason for moving away from the technology was raised in the free text answer box which stated that the material was also offered in a digital form.

Cost of equipment maintenance and the microforms themselves was only identified by one institution as a reason to migrate. The cost of the actual reading equipment was not considered a factor.

8. What media replaced the microforms?

#	Answer		Response	%
1	Digital		5	83%
2	Hard-copy print		1	17%
3	Other:		0	0%
	Total		6	100%

Although this question could be answered by selecting as many options as necessary all 6 replies selected just one option each. The media most libraries are shifting to is the digital. One library stated hard-copy print is the medium of choice, this would indicate the library is interested in owning the material outright rather than being locked into some sort of subscription arrangement, or having to rely on a third party.

9. Is data collected on collection use?



#	Answer		Response	%
1	None		3	50%
2	Some		2	33%
3	Comprehensive		0	0%
4	Other:		1	17%
	Total		6	100%

Other:

Indicative via inquiries and prints made

Discerning the level of usage data collected by the institutions is interesting, and the replies inform the results of question 7. Here, 50% of replies state no collection use data is collected for their microform collections, 33% collect some sort of use data, and 16% infer levels of use by identifying user queries and print counts. Such results explain why only 50% of libraries quoted user preference as a reason for switching formats.



10. Is there a specific microforms librarian?

#	Answer		Response	%
1	Yes		1	17%
2	No		5	83%
	Total		6	100%

Generally there is no specific individual responsible for microform collections.

Just one of the responding institutions, a university, confirmed there was a specific librarian for the role.




11. Is there a specific policy governing the microform collections?

#	Answer		Response	%
1	Yes		1	17%
2	No		5	83%
	Total		6	100%

This question follows a similar line to question 10, and received the same result.

Collections generally lacked a specific policy, but one university stated they had one. Interestingly this was not the same institution that has a dedicated microforms librarian.

12. How is the collection promoted?

#	Answer		Response	%
1	No promotion		4	67%
2	Notice board		1	17%
3	Blog or RSS		0	0%
4	Other:		1	17%
	Total		6	100%

Other:

Via the Liaison Librarians typically, otherwise access is discoverable through the library catalogue

Very little promotion of microform materials appears to be done in the responding institutions.

Most state no promotion is done what so ever, one relies on the Liaison Librarians to point things out, with only one actively promoting the collection on a notice board.

As discovery via a catalogue is something all the libraries would be able to provide it would be fair to claim that 83% do no promotion and 17% do something.

13. What future do you see for microform technology?

Text Response
Great for accessing inexpensively, some research material
specialist use, user determined
None at our institution.
None
Still an important medium for archival material, and newspapers. It does have a future but use will probably decline over time.
Currently provides a secure, long term platform for collections e.g. newspapers. But still required in the future? I don't know.
None, other technologies have replaced the need for microform
No future will be discontinued
There will still be a place for it as a number of primary resources are only available on microfilm, but over time digital will be the way to go
Limited, only archival for what currently only exists in this format. Even that is doubtful as I imagine there are now better long term storage options.
For most resources it is outdated
Very little - newer technologies with searchability have superseded microform
very little
archival only
None

Statistic	Value
Total Responses	15

All bar one of the polytechnic responders chose to answer this open text question.

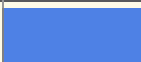

The general consensus from the replies is that the medium is not perceived to have a long term future.

Only one of the responding polytechnics expressed a view of “limited” future, with all other polytechnic replies being firmly negative.

Responses from universities were more moderate, here the value of the medium was recognised, particularly for archival and newspaper materials, but there was an admission that reliance will almost certainly diminish over time.

The two wānanga posted very differing replies. One dismissed microform as a medium stating that it will be discontinued, while the other provided the most encouraging future for the medium by highlighting the cost effective nature of access.

14. Are there any further comments you would like to make regarding microforms?

#	Answer		Response	%
1	Yes:		4	25%
2	No		12	75%
	Total		16	100%

Yes:

User preference will probably pressure publishers into providing digital substitutes.

Publisher of one research collection we have does not expect to be able to fund digitizing the earlier papers - so we continue with the collection in 2 formats

The reader was big & bulky and took up a lot of space, I am glad that as a librarian this format has been replaced

I find them fascinating to use!

This final question was offered to enable respondents to express any view or comment they might have regarding microfilm without having to address a particular question. Responses were posted by 1 polytechnic librarian, 2 university librarians, and 1 wānanga librarian, and what was posted is very interesting.

The first comment fairly represents the dominant view that digital formats will replace older formats purely through user expectation and preference. However the second reply highlights an aspect which is not often raised, that is the cost of digitisation. If a publisher expresses a concern regarding their ability to digitise and provide access to an electronic version, then microformat materials would offer the only viable alternative. This sort of issue could be very relevant for highly specialised collections which would not generate a large subscription base.

Of the final comments the third represent the perennial problem of microforms – user acceptance to the machinery. Resistance to bulky reader units are

constantly mentioned in the literature as a major obstacle to user acceptance of the medium (Cheney, 2010). Regardless of the value of the content, the container proves too much of a barrier.

It would be tempting to say that the final comment represents an opposite view, however it would be fairer to say that this reply puts microform technology into the 'curiosities' box, particularly as that particular responder previously noted the medium had been superseded by newer technologies.

13: Discussion

As mentioned in the previous section insufficient replies were received to the survey instrument to provide conclusive, valid results. However, the answers received can provide general 'indications' of the state of microform use in New Zealand's academic libraries; and can go some way to informing the research questions.

How are microform collections managed in the libraries of New Zealand's academic libraries?

Without exception microform materials are treated the same way as any other hardcopy material. There are no separate budgets for the format, and only one institution has a specific librarian tasked to care for the microform collection.

One respondent mentioned the existence of a specific collection management policy dealing with microforms, yet interestingly this is not the institution with the dedicated microforms librarian.

Promotion of materials held on microform is rarely done. Four of the responding institutions admitted to no promotion, one stated that catalogue discovery and promotion by individual Subject Librarians was all that was undertaken, which left only one institution undertaking promotion in the form of a notice board to list new holdings.

In general no special attention or consideration is afforded to the format.

Although some statistics are gathered little serious attention is given to its usage within the libraries.

These results appear to typify the state of many microform collections around the world. Debora Madsen (2006) labelled this state of affairs a form of “benign neglect”, where the technology is left ‘well enough alone’ in favour of promoting the newer options available. She believes passive discovery through catalogue records, and promotion of resources through Subject Librarians are insufficient, as more often than not the resources available are often not fully realised by the organisations’ staff.

The patchy collection of usage data is also an interesting observation amongst these institutions. As mentioned previously in the literature review, microform collections represent a relatively straight forward area in which to monitor usage compared to the difficulties presented by print resources (Shepherd, 2004); the reels and fiche are rarely taken from the library, and user have to employ special equipment to view the content, consequently the collections are effectively ‘contained’ and there would be no discrete use to skew statistics.

Is the use of microform technology being discontinued, substituted, or retained?

All responding institutions indicated they were moving to away from microformat technology to some degree.

To what extent has digitisation affected libraries decisions regarding microform collections?

Access to materials via a digital interface has had a huge impact on the decisions libraries make regarding the provision of content. The searchability benefits provided by digital access are universal cited and cannot be argued with.

How well are existing collections used?

This question can only be answered inferentially. Most of the responding institutions only collect partial usage statistics for their microform collections, or infer usage through user queries and print counts. The replies to the survey indicate that collections are still in use, but do not allow an analysis of the level of use.

An understanding of a collections' level of use is extremely important to the collection, or content, management process as outlined in the literature review. It provides firm support for budget allocation decisions (Crosetto, et al., 2008), or optimising staffing levels (Wagner, 2007), and any number of other managerial undertakings. Such usage surveys do not need to be excessively complex or expensive; variations on Shaw's (1978) method of shelving studies

could be incorporated into the normal workflow for library staff and provide data over a long timeframe which is generally considered preferable (Butkovich, 1996).

What level of satisfaction is there with the medium?

Satisfaction with the medium is generally low.

Half of the responders mentioned user preference as a reason for switching to alternative, digital, formats with one institution plainly stating the technology was outmoded, big and bulky, and was pleased to see the back of it.

The comment that one librarian found the format “fascinating to use” is not necessarily an endorsement of satisfaction, but is an indication that the format isn’t universally daunting.

What is the perceived future for microform technology?

Many of the responding institutions see absolutely no future at all for microform technology; there is a belief that it is a format which has had its day, and should make way for newer technologies.

However, those that discount the medium out of hand are those institutions that do not hold the format within their current collection, so have probably had limited experience of its benefits and disadvantages. Of those that do have some microform in their library’s mix, there is the belief that microform will continue to have some specialist archival purposes at least for the short to medium term, and that it remains a good cost effective way for accessing some research material.

Certainly in terms of specialist purposes the future of microforms appears rather healthy, as microform is positioning itself as a long term, secure preservation tool for non-dynamic digital content (Brown et al., 2011). Microform also provides features which digital technologies currently lack such as “persistent identifiers, integrity, and authenticity” (de Lusenet, 2006). With such considerations in mind, the idea of maintaining a microform collection does not appear to be simply an exercise in retaining a redundant technology.

14: Conclusion

In conclusion, from the results received the use of microforms in New Zealand’s academic libraries appears rather limited.

The trend predicted by Harloe and Budd to move towards a concept of ‘content management’ over collection management has been born out, with moves away from microform technologies to digital formats being attributed to factors such as user preference, ease of access, and searchability.

Of the institutions still holding microform materials, there appears to be a little direct involvement with the collections in terms of promotion or appraisal of use.

The overall belief expressed by the professionals questioned is that microform materials will continue to remain relevant in specialist, archival settings, but there is little confidence in it having any form of long-term future.

15: Opportunities for further research

This study raises a number of opportunities for future research.

Firstly, there is the opportunity to repeat the survey after a suitable interval of time so as to determine trends or changes in attitudes and holdings. Future surveys could also be expanded to investigate what type of materials institutions hold on microform, be it serials, archival material, or government information and statistics. Doing this will add a greater depth to the national picture.

Conducting the study in other countries would also prove informative, particularly to contrast the New Zealand data. Responses gathered from institutions in Australia for example would be very interesting.

Ascertaining actual levels of use in institutions which hold microform collections, and comparing that use, would yield some interesting data. Currently it appears measurement of actual use is conducted on a relatively informal basis, or not undertaken at all. The contained nature of a microform collection would enable a close study to reveal very accurate results.

One of the comments received in response to question 14 also provides an interesting opportunity for future research. That would be a study of publishers' attitudes and beliefs to microformat publishing. The idea that a publisher would consider not funding future digitisation of a title certainly bears investigating as their ability to provide products directly impact on what libraries are able to offer.

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17: Appendices

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Appendix 17.1: Contacts list

Directory of Tertiary Institutions as at 01/02/2011					Location		Institution Information	
Name	Street	City	Type	Regional Council				
Aoraki Polytechnic	Arthur Street	Timaru	Polytechnics	Canterbury Region				
Bay of Plenty Polytechnic	Windermere Drive	Windermere	Polytechnics	Bay of Plenty Region				
Unitec New Zealand	139 Carrington Road	Auckland	Polytechnics	Auckland Region				
Christchurch Polytechnic Inst of Tech	130 Madras Street	Christchurch	Polytechnics	Canterbury Region				
Eastern Institute of Technology	501 Gloucester Street	Napier	Polytechnics	Hawkes Bay Region				
Wellington Institute of Technology	Buck Street	Lower Hutt	Polytechnics	Wellington Region				
Universal College of Learning Palmerston North	138 Queen Street	Palmerston North	Polytechnics	Manawatu-Wanganui Region				
- Wanganui								
- Wairarapa								
Manukau Institute of Technology	Gate 1 Newbury Street	Auckland	Polytechnics	Auckland Region				
Nelson Marlborough Inst of Technology	322 Hardy Street	Nelson	Polytechnics	Nelson Region				
Northland Polytechnic	55 Raumanga Valley Road	Whangarei	Polytechnics	Northland Region				
Otago Polytechnic	Forth Street	Dunedin	Polytechnics	Otago Region				
Whitireia Community Polytechnic	Wi Neera Drive	Porirua	Polytechnics	Wellington Region				
Southern Institute of Technology	133 Tay Street	Invercargill	Polytechnics	Southland Region				
Eastern Institute of Tech (Tairāwhiti)	290 Palmerston Road	Gisborne	Polytechnics	Gisborne Region				
Western Institute of Technology Taranaki	20 Bell Street	New Plymouth	Polytechnics	Taranaki Region				
Wairariki Institute of Technology	Mokola Drive	Rotorua	Polytechnics	Bay of Plenty Region				
Waikato Institute of Technology	Gate 5, Tristram Street	Hamilton	Polytechnics	Waikato Region				
Open Polytechnic	86 Wyndrum Avenue	Lower Hutt	Polytechnics	Wellington Region				
Tai Poutini Polytechnic	73 Tairāwhiti Street	Greymouth	Polytechnics	West Coast Region				
Telford Rural Polytechnic	Cnr Owaka Highway and Gray Road	Balclutha	Polytechnics	Otago Region				
University of Auckland	24 Princes Street	Auckland	Universities	Auckland Region				
University of Waikato	Hillcrest Road	Hamilton	Universities	Waikato Region				
Massey University	Tennant Drive	Palmerston North	Universities	Manawatu-Wanganui Region				
Victoria University of Wellington	Kelburn Parade	Wellington	Universities	Wellington Region				
University of Canterbury	Ilam Road	Christchurch	Universities	Canterbury Region				
Lincoln University	Ellesmere Junction Rd	Lincoln University	Universities	Canterbury Region				
University of Otago	Leith Street	Dunedin	Universities	Otago Region				
Auckland University of Technology	55 Wellesley St East	Auckland	Universities	Auckland Region				
Te Wānanga O Aotearoa	1 Factory Road	Te Awaamutu	Wananga	Waikato Region				
Te Wānanga O Raukawa	160 Tasman Road	Okaki	Wananga	Wellington Region				
Te Whare Wānanga O Awanuiarangi	Francis St	Whakatane	Wananga	Bay of Plenty Region				

Appendix 17.2: Cover letter

Dear _____,

My name is William Hamill, and I am studying towards my Masters in Information Studies in Library Science (MIS(LIBS)) at Victoria University of Wellington.

For my final assessment I am conducting research on the use of microform material in New Zealand public tertiary institutions. To achieve this I am conducting an online survey to ascertain whether microform materials are held, how they are managed, and whether they are still viewed as a relevant alternative format.

Your participation in this survey would be greatly appreciated. The survey should take 5-10 minutes to complete, and even responses which indicate that no microform material is held will be useful.

All responses are confidential, and all data collected will be stored in password protected files and destroyed after 2 years.

For a fuller description of the survey please read the attached information sheet, and then click this link _____ to begin the survey.

Feedback will be available on request; the final survey question will enable this to be indicated, and provide space for a contact email.

If you are not the best person to answer this survey, please forward it to the most relevant staff member.

Because of the short time available to complete this project it would be helpful to have responses as quickly as possible; access to the survey will be unavailable after the _____.

Thanks very much for your time and input

William Hamill
Masters Student (Master of Information Studies, Library Science)
School of Information Management
Victoria University of Wellington

Email: hamillwill@vuw.ac.nz
Phone: (09) 373 7599 x84913

Appendix 17.3: Information sheet



SCHOOL OF INFORMATION MANAGEMENT

Dear Participant,

My name is William Hamill, and I am studying towards my Masters in Information Studies in Library Science (MIS(LIBS)) at Victoria University of Wellington.

For my final assessment I am conducting research on the use of microform material in New Zealand public tertiary institutions. To achieve this I am conducting a survey of public tertiary institutions to ascertain whether microform materials are held, how they are managed, and whether the technology is still viewed as a relevant alternative format.

The survey is conducted online using the Qualtrics platform, and consists of 14 questions that should take no more than 10 minutes to complete. All responses are confidential and no specific identifying questions are required; access to all data collected will be restricted to my supervisor and me.

If you would like to receive a summary of the survey results I would be happy to share them with you. The final survey question relates to the provision of feedback, and has space for an email address for providing the summary if desired.

The research will culminate in a final report which will be held physically in the Victoria University of Wellington library, and online via the VUW institutional repository.

All data collected in relation to this project will be kept in a copy protected file and will be destroyed after a period of 2 years.

Thank you for your time and input in this project, without it the study would not be possible.

William Hamill
Masters Student (Master of Information Studies, Library Science)
School of Information Management
Victoria University of Wellington

Email: hamillwill@vuw.ac.nz
Phone: (09) 373 7599 x84913

Gillian Oliver (Supervisor)
School of Information Management
Gillian.olliver@vuw.ac.nz
(04) 463 7437

SCHOOL OF INFORMATION MANAGEMENT

FACULTY OF COMMERCE AND ADMINISTRATION

Appendix 17.4: Survey questions

Survey questions

1. What type of public tertiary institution are you?
 - Polytechnic
 - University
 - Wānanga
2. Do you hold microform materials?
 - Yes
 - No

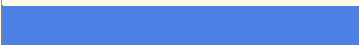


[At this point the survey will direct all respondents who answered 'no' to the final question]

3. What formats of microform are contained within your collection? (select all that apply)
 - Ultrafiche
 - Microcard
 - Microfiche
 - Microfilm
4. Does your institution have a separate budget for microform material?
 - Yes
 - No
5. Is the budget for microform material...?
 - Increasing
 - Decreasing
 - Stable
 - N/A
6. Has your institution replaced, substituted, or discontinued the use of microforms?
 - Yes
 - Partially
 - No

7. If so, what reasons drove the decision to replace, substitute, or discontinue the use of microforms? (select all that apply)
- User preference
 - Cost of maintenance
 - Cost of equipment
 - Cost of microforms
 - Other: _____
8. What media replaced the microforms? (select all that apply)
- Digital
 - Hardcopy print
 - Other: _____
9. Is data collected on collection use?
- None
 - Some
 - Comprehensive
 - Other: _____
10. Is there a specific microforms librarian?
- Yes
 - No
11. Is there a specific policy governing the microform collections?
- Yes
 - No
12. How is the collection promoted?
- No promotion
 - Notice board
 - Blog or RSS
 - Other: _____
13. What future do you see for microform technology?
- _____
14. Would you like to receive a summary of the survey results?
- Yes
_____ (enter contact email)
 - No



Appendix 17.5: Summary of results

1. What type of tertiary institution are you?

#	Answer		Response	%
1	Polytechnic		10	63%
2	University		4	25%
3	Wānanga		2	13%
	Total		16	100%

Statistic	Value
Min Value	1
Max Value	3
Mean	1.50
Variance	0.53
Standard Deviation	0.73
Total Responses	16

2. Do you hold microform materials?

#	Answer		Response	%
1	Yes		6	38%
2	No		10	63%
	Total		16	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.63
Variance	0.25
Standard Deviation	0.50
Total Responses	16

3. What formats of microform are contained within your collection? (select all that apply)

#	Answer		Response	%
1	Ultrafiche		0	0%
2	Microcard	<div></div>	1	17%
3	Microfiche	<div></div>	6	100%
4	Microfilm	<div></div>	5	83%

Statistic	Value
Min Value	2
Max Value	4
Total Responses	6

4. Does your institution have a separate budget for microform material?

#	Answer		Response	%
1	Yes		0	0%
2	No	<div></div>	6	100%
	Total		6	100%



Statistic	Value
Min Value	2
Max Value	2
Mean	2.00
Variance	0.00
Standard Deviation	0.00
Total Responses	6

5. Is the budget for microform material...?

#	Answer		Response	%
1	Increasing		0	0%
2	Decreasing		0	0%
3	Stable		0	0%
	Total		0	0%

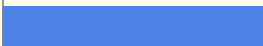


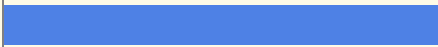
Statistic	Value
Min Value	-
Max Value	-
Mean	0.00
Variance	0.00
Standard Deviation	0.00
Total Responses	0

6. Has your institution replaced, substituted, or discontinued the use of microforms?

#	Answer		Response	%
1	Yes		1	17%
2	Partially		5	83%
3	No		0	0%
	Total		6	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.83
Variance	0.17
Standard Deviation	0.41
Total Responses	6

7. If so, what reasons drove the decision to replace, substitute, or discontinue the use of microforms? (select all that apply)

#	Answer		Response	%
1	User preference		3	50%
2	Cost of maintenance		1	17%
3	Cost of equipment		0	0%
4	Cost of microforms		1	17%
5	Other:		5	83%

Other:

creating collection

Online availability


Availability as electronic

Material now accessible digitally

outmoded format, electronic access to resources is far better

Statistic	Value
Min Value	1
Max Value	5
Total Responses	6

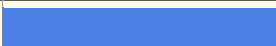


8. What media replaced the microforms? (select all that apply)

#	Answer		Response	%
1	Digital		5	83%
2	Hard-copy print		1	17%
3	Other:		0	0%
	Total		6	100%

Other:

Statistic	Value
Min Value	1
Max Value	2
Mean	1.17
Variance	0.17
Standard Deviation	0.41
Total Responses	6

9. Is data collected on collection use?

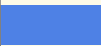

#	Answer		Response	%
1	None		3	50%
2	Some		2	33%
3	Comprehensive		0	0%
4	Other:		1	17%
	Total		6	100%

Other:

Indicative via inquiries and prints made



Statistic	Value
Min Value	1
Max Value	4
Mean	1.83
Variance	1.37
Standard Deviation	1.17
Total Responses	6

10. Is there a specific microforms librarian?

#	Answer		Response	%
1	Yes		1	17%
2	No		5	83%
	Total		6	100%

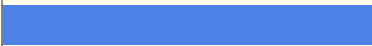


Statistic	Value
Min Value	1
Max Value	2
Mean	1.83
Variance	0.17
Standard Deviation	0.41
Total Responses	6

11. Is there a specific policy governing the microform collections?

#	Answer		Response	%
1	Yes		1	17%
2	No		5	83%
	Total		6	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.83
Variance	0.17
Standard Deviation	0.41
Total Responses	6

12. How is the collection promoted?

#	Answer		Response	%
1	No promotion		4	67%
2	Notice board		1	17%
3	Blog or RSS		0	0%
4	Other:		1	17%
	Total		6	100%

Other:

Via the Liaison Librarians typically, otherwise access is discoverable through the library catalogue

Statistic	Value
Min Value	1
Max Value	4
Mean	1.67
Variance	1.47
Standard Deviation	1.21
Total Responses	6

13. What future do you see for microform technology?

Text Response

Great for accessing inexpensively, some research material
specialist use, user determined

None at our institution.

None

Still an important medium for archival material, and newspapers. It does have a future but use will probably decline over time.

Currently provides a secure, long term platform for collections e.g. newspapers. But still required in the future? I don't know.

None, other technologies have replaced the need for microform

No future will be discontinued

There will still be a place for it as a number of primary resources are only available on microfilm, but over time digital will be the way to go

Limited, only archival for what currently only exists in this format. Even that is doubtful as I imagine there are now better long term storage options.

For most resources it is outdated

Very little - newer technologies with searchability have superseded microform


very little

archival only

none

Statistic	Value
Total Responses	15

14. Are there any further comments you would like to make regarding microforms?

#	Answer		Response	%
1	Yes:		4	25%
2	No		12	75%
	Total		16	100%

Yes:
User preference will probably pressure publishers into providing digital substitutes.
Publisher of one research collection we have does not expect to be able to fund digitizing the earlier papers - so we continue with the collection in 2 formats
The reader was big & bulky and took up a lot of space, I am glad that as a librarian this format has been replaced
I find them fascinating to use!

Statistic	Value
Min Value	1
Max Value	2
Mean	1.75
Variance	0.20
Standard Deviation	0.45
Total Responses	16