

Privileges Online Application Management System

Privileges staff are often the first face of the Harvard Library system for patrons seeking access to our resources. And while privileges eligibility include myriad categories of patrons, from clergy within a 10 mile radius of Harvard, WGBH employees, and Cambridge College students in addition to visiting professors, often the staff of Privileges find themselves in the position of saying no. No, you are not eligible to access Harvard's collections. Many times this is said to tourists, some who threaten, others who serenade with guitars in an attempt to bend the access policies for themselves. Privileges staff are experts at explaining the need to ensure Harvard's collections are available for legitimate research use and that the Stacks are not a tourist destination.

One of the things that makes the job in Privileges difficult, beyond resisting the serenading of Latin vocalists, is that there are a large variety of separate and distinct categories of users eligible for just as large of a variety of privileges. Fletcher School students and faculty from Tufts can access and borrow from HCL and Langdell collections, Episcopal Divinity School students and faculty can borrow from HCL and Andover-Theological collections, the Editor-in-Chief and Associate Editor of the Adams Papers can borrow from HCL only (with the exception of Lamont which allows them access only). Another difficulty is that there is no online mechanism by which patrons can determine their eligibility. Instead, access eligibility is determined through conversation with staff, in person, by phone, or via email. On average, Widener privileges statistics show that these conversations last about 11 minutes per patron on average and that privileges staff have approximately 13,800 conversations per year.

The Privileges Online Application Management System would facilitate access to the Harvard Library for both patrons and staff.

This system would allow patrons to determine their eligibility for access and/or borrowing privileges online for the Harvard Library. Documentation requirements would be clearly outlined and recommendation letters could be submitted through the system in advance of the patron's arrival at Harvard Library.

Of the 13,800 conversations that the Privileges staff currently handle, approximately 8,800 patrons are granted privileges per year. The income generated at Widener Privileges is approximately \$250,000 per year. For staff the benefits of clearly outlined eligibility requirements would result in fewer basic questions from patrons.

Departmental staff managing visiting researchers for programs like summer conferences would be able to manage adding and deleting the thousands of eligible users through an online interface. What is currently done via email and managed via printouts would become a seamless online service. No longer would staff have to page through countless printouts of original lists and additional submission/deletion email attachments to confirm eligibility of a summer conference participant. Instead, lists would be submitted by departmental administrators through an online interface, where library staff could quickly search online to confirm the patron's status.

In the paper-based privileges world we occupy now, staff must take the patron application and re-key it up to three times in three different systems in order to ensure gate access and borrowing privileges are established. By creating an online application

system, staff should be able to send the information already entered by the patron to each of the three systems automatically. Staff would also be able to run reports on which program participants registered for privileges. Tied in with a separate ID card category, this would allow for more clarity as to what groups of users were accessing Harvard Library resources (at libraries with gate controlled access).

Currently, many libraries in the Harvard Library have separate access agreements, for example Gutman grants access to Cambridge College affiliates and Langdell grants access to Fletcher School (Tufts) students. There are also very separate charges for access and borrowing Privileges that vary by location. Baker Library charges up to \$50 per day in some cases, Widener charges vary from nothing up to \$750 per year depending on affiliation. While the Harvard Library Transition is expected to streamline the privileges access and borrowing workflows, the ability to track patron interest in particular collections could help inform keeping agreements and pricing current to market interest.

By creating an online application system for patrons, and a privileges management system for staff in the libraries and in the faculty departments, we expect a savings in staff time for basic queries and processing. This estimate encompasses reduced need for individual conversations at the desk to ascertain privileges eligibility, reduced processing time for summer conference participants, and reduced data entry time to individual patrons. With over 8,800 instances of privileges being issued per year through Widener alone, this is a significant savings in staff time and will make the process much clearer and less time consuming for patrons.