Archives and Special Collections Class Request Tool
Note: For additional information requested, please see addendum - RH.

Many archives and special collections across Harvard host classes where teachers and students can work directly with primary source materials. The demand for this kind of class activity is growing dramatically. Houghton Library, for example, has doubled its numbers in the last six years, reaching almost 200 class sessions in 2011-12. This trend is most welcome, but it also requires infrastructure to support it.

Proposal:

Develop a pilot website that would: 1) allow instructors to request assistance/space/time for teaching with primary sources at Harvard's archives and special collections repositories; and 2) assist library staff in establishing more effective and centralized management of seminar requests for classes

The website, available from the portal and linked with all relevant repositories, would describe policies and procedures for hosted classes, collect information necessary for booking, and reserve the requested time and space. It will also notify staff of class requests and help staff arrange their coverage of hosted classes.

The page of approved classes would be open to public view for promotion of teaching with archives and special collections.

Preliminary Questions:

Are there other class request systems (at Harvard or not)? How can we pair up with other libraries? Fit in to existing procedures Harvard-wide? Since this site would only be for classes requiring the presence of primary source materials, how we both distinguish from, and dovetail with existing research instruction class offerings?

Plan:

Create a site that gathers the following information:
1) Course number and title
2) Number of students
3) Course leaders names and email addresses (should include all who will make material requests for the class)
4) Syllabus (to be uploaded or linked)
5) Level of library staff involvement requested
   a. presentation on repository and collection/s
   b. presentation on safe handling of materials, etc.
   c. instruction in archives and special collections research
   d. assistance with selection of materials for class
   e. assistance with presentation of materials in class
   f. no involvement needed beyond setup

6) Preferred host library (with links out to specific "next step" pages)
   a. I'm not sure
   b. Houghton
   c. Harvard University Archives
   d. Schlesinger
   e. Others, etc…
7) Special requests/general notes

Enable processing of requests through the tool:

Teachers complete this form and submit their requests. For class requests which do not specify a repository, requests would be funneled into a central pool (monitored by?). The class could be selected and routed to a specific repository, depending on where the most useful resources are available. Materials *will not* travel between repositories for this program.

For class requests where a specific repository is designated, the faculty member would be sent to a customized page for that repository. A calendar for those with locally maintained classroom Outlook calendars will be synced and display already reserved slots. Upon reservation of a time slot and submission of the necessary information, staff coordinator at the selected repository will be notified and may then issue their approval. Following approval, the class will be listed as an active event for the repository. The list of active classes will also be published as feed to which library staff may be subscribed for notification of all new class events. Staff may then be appointed or appoint themselves responsible for managing the requested class.

The tool will notify teachers that their class has been adopted and what their next steps will be. And once classes have been adopted, the classes will be displayed on the page along with the staff contact name and repository.

Benefits

Streamlined and single-source request process
Centralized management process
Possible redistribution of classes among special collections at Harvard
Exposure of the many and varied classes hosted by archives and special collections
An opportunity to standardize and collect metrics on teaching in archives and special collections

Building on the Tool

For repositories using Aeon, this tool could link faculty directly with their Aeon Event record creating seamless access to a list of the items being used in their classes.
For assignments designed to produce a cross-repository exhibition, planning, tracking, and publicity could begin here.

Assessment

Decreased and more efficiently distributed staff time

        o   Measured in emails/RT sent to arrange hosted classes

        o   Measured in staff time spent

Instructor feedback – [built in?] survey at end of class

Redistribution rate repository to repository – compare with earlier years

Increase of special collections for teaching – same as above

Better distribution of responsibility for classes among staff within repository – same as above

Assistance needed:

1) A dedicated developer who can help create the site so that it is transparently easy to use, expandable, and compatible with other library applications/sites.
2) Collaboration of library and archives staff
3) Agreement on the part of portal-keepers to allow the tool to be linked within the Archives and Special Collections section of the portal
4) Comments, suggestions, recommendations, concerns from fellow community members about how to make this as useful as possible to all!

Rachel Howarth
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8/6/12

Addendum 10/4/12
Lib Lab Committee questions in *italic*.
If there are more, please let me know. Thanks, RH

1) *Describe the current system – how much staff time would this save? Talk about metrics, what gets measured and not and how this will help.*
   The current system at Houghton uses Aeon to count classes. For additional information on this, and other public services metrics kept at Houghton, please see this blog entry:
   http://blogs.law.harvard.edu/houghton/2012/09/11/our-two-year-aeoniversary/
   The staff time that this Tool would save is mainly in the hundreds of back and forth emails for so many classes, scheduling and information gathering. That time is real, but not measured. This tool would get the main information (class size, syllabus, scheduling preferences, etc.) up front. It would also give us more uniform information across collections from which to make future decisions. Also, the goal of this Tool is not only to save staff time, but to help coordinate and promote teaching across Special Collections at Harvard.

2) *Talk with Jim Boron to see how this could be part of the portal.*
   Jim and I met on 9/18/12. He agreed that that this Tool would fit well conceptually with the mission for the Portal to assist Research, Teaching, and Learning. Although the Tool itself would

not appropriately be *hosted* on the Portal, access to it, and the list of classes derived from it, could be placed within the Archives and Special Collections section of the portal (http://lib.harvard.edu/archives-and-special-collections) under a new sub-section entitled "Teaching with the Collections." I am grateful to him also for sketching out a graphic of how the Tool might be best described to any potential developer should the idea get funded. I'm glad to provide a scan of this if the committee would like to see it.

3) *Get formalized support from other PS folks in other units.*
I reached out to seven colleagues with the memo copied at the bottom of this addendum. I received thoughtful responses from all of them and would be happy to share those if the committee would like to see them. Overall, I received a great deal of support: three volunteered directly to serve as consultants (Cliff Wunderlich, Divinity; Ellen Shea, Schlesinger; Barbara Meloni, Harvard University Archives); and the other four expressed their willingness if I felt their input would be valuable – which I do (Leslie Schoenfeld, Law; Jack Eckert, Countway Center for Medical History; Hugh Truslow, Fung; Katherine Fox, Baker Business Historical Collections).   I also contacted Megan-Sniffin Marinoff, Chair of Affinity Group 5 to make her aware of the proposal. AG5 priorities are directed much more broadly just now but, after asking a few clarification questions she wrote: "Don't wait for us – just go ahead as you see fit."

4) *Identify the parameters of the project (Pilot? Suggest other units' participation for a semester?). Identify how to accommodate smaller collections.*
This will be a pilot – ideally the first delivery date for development would be winter break, with a roll out in August and a review at the end of the fall semester. I will ask all self-identified Harvard Archives and Special Collections if they would like to participate, letting them know that they can change their minds at the end one semester if they like. With the help of my consultants, I will devise text for smaller collections (again, please see memo below) that will not put an undue burden on them. However, the tool will, ideally, help to reveal where there is more and less demand and where we might best reposition resources to meet emerging faculty needs.

COPY OF MEMO (10/2/12) RE: LIBRARY LAB (individual answers available upon request)

Hi folks,
I've been asked by the Library Lab Committee to revise my proposal by this Friday! One thing I've gotta do is find out about a few things from you all. If you could please take 5 mins to answer these questions, I would be hugely grateful!
1) How many classes do you have each year?
2) How do these get scheduled and arranged?
3) How do you currently collect statistics about these classes? ("Manually" is a fine answer).
4) Would you be willing to be listed as a "consultant" for me on this project?
I'm very concerned to make this Tool so that it does not place an undue burden on any collection that doesn't have the staff/space to handle it. I'll need your help (if it gets funded) putting together language that is encouraging to instructors but does not create expectations that we can't meet as a community. I'd also like to frame the whole thing as a pilot for one semester – being sure to have a scheduled assessment and revision date.
Thanks as always,
Rachel