SOURCERY DESIGN CHARRETTE REPORT

May 17-18, 2022

Northeastern University, Boston, MA

sourcery

Northeastern University Library

GREENHOUSE STUDIOS

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Intended Purpose of Charrette

The development team gathered over two days, from May 17-18, 2022, with testing partners and advisory board members to share progress on the app; gain feedback on its development; facilitate discussion among multiple user types to confirm or shift the direction of the development of the app; initiate conversations that sparked questions that the development team had not yet thought of; brainstorm use cases and possible roadblocks; and identify concrete next steps. There were six sessions total, three on each day, focusing on topics such as design analysis, integrating Sourcery with existing work practices and systems, challenges and opportunities, sustainability, and third party fulfillment.

Session Summaries

Day 1, Session 1: Design Analysis

The first session on day one of the charrette focused on design analysis of the app's updated interface. The session started with a walkthrough of the Sourcery app on a screen-by-screen basis.

Feedback from attendees was given on the Researcher Dashboard after the demo. Critique regarding labeling, language, and terms used in the dashboard was the most prevalent feedback. One attendee [Melica] asked about the language and meaning of the term "archive requests" and how it differed from "completed requests". The design and development team answered that because Sourcey isn't a document holding site that once a file is sent the scan is archived in order to reduce storage. Conversations with the group led to ideas around changing the language to "previously requested," "request history," or "fulfilled requests" to clarify the completion of a request that can no longer be edited instead of "archiving" a request. Other language improvements could be made with the term "document information" as the request may be made of more than one document.

Other feedback on this page surrounded user feedback and prompts. Attendees brought up questions such as "When users make a request, are there any prompts giving them feedback on how to title things?" and "are they prompted to be specific with the title of their request?" These specific questions were directed at the space-holder text that appeared in the request information box. Testing partners relayed information that reference requests often come in one of two forms: the first is a more general request that follows the pattern of a reference interview, where the two users ask and answer questions based on an institution's collection and relies on the fulfiller's knowledge of their inventory; the second is a specific request where the requester knows exactly what they are looking for based on previous information, a citation, the institution's finding aide, etc. The development team answered that additional research and feedback would be needed, as prompts and wording for users may be institution-specific

Feedback on the designs evolved into a conversation of feature uses and adaptations within the request and fulfillment workflow. Questions regarding necessary document specificity in the request process led to a conversation centered around the ability to request directly from an institution's finding aide. The design and development team planned to begin integrations with software such as ArchivesSpace beginning in Fall 2022 to alleviate the specificity issue. Requests may need to be amended after they've been submitted, as recognized by charrette attendees as a possible bump in the workflow, and questions regarding the ability to edit a request arose. While users cannot edit request information after submission, they may use the communication interface to request any other additional documents or make any clarifications. This creates less space for edits to go unnoticed by the fulfiller when completing a request and allows for a more natural reference interview to take place if needed. As conversations around request specificity evolved over the last two points, some attendees offered the idea of implementing multiple user pathways depending upon request needs. For example, as a researcher initiated a request, they would have the option of selecting one of two options: the first being a request for a specific document; the second being a more general and methods of request management came up organically.

Another topic to think about was adding something within a collection. It can be helpful to know someone needs a specific document from a specific folder. If the request is given, and then there is an additional part to the request, how can that be added on? Because it is unknown how specific users will be with requests, what is more common should be identified and used to guide them. This is something the development team will get back to. As for different screens for types of requests, there could be a fork for advanced requests versus more generic ones. The development team plans to add the fork later, which was in the original plan.

Charrette attendees representing the various institutions asked if there was a way that institutions could break requests into multiple requests, or even combine them. Can institutions pull requests apart on the back end to account for complex ones, or can people only collect one collection at a time? This is something for the development team to think about. In terms of downloads, is there no limit to the amount of downloads, just the amount of times users can download a specific request? Should it be timed or should it allow users to download only once? The goal is to not keep files forever in accounts because of storage and liability for holding copyrighted material.

After 30 days, fulfilled requests will have to go away. They cannot stay there forever. However, it is important to keep in mind that users make mistakes and may download something to the wrong device or not be able to find where they downloaded something. A question was asked about the minimal computing dashboard being kept the same. The development team mentioned that they have not started working on minimal computing.

Other things to think about were delegating requests to interns, having them work without giving them access to passwords and other login information, and making it possible for groups of students to request. For users with multiple requests, there should be an ability to group the requests. Institutions putting limits on how many requests a user makes was discussed.

The attendees loved the design language, color schemes, and layout overall. There should be a white theme and a dark theme for users to switch between. There should also be a thumbnail with a preview to remind researchers of the specific document they are requesting. There is a need to revisit accessibility and get an accessibility consultant. People with low vision may not be able to see certain colors, and there cannot be text over images. Considering any other useful data to have at the top of the dashboard, a navigation element that gets users to where they need to go may be helpful, and also to inform them what the button is getting them to. Furthermore, when something is in progress, there should be a feature that displays what number the requester is in the queue, ultimately to give them confidence that progress is being made. Finally, a different icon for the analytics should be used.

Feedback was given on Create a Request: Step 1 after the demo. Regarding the issue of scaling, it was brought up that the current approach being taken would not scale well, especially considering several repositories, which is something the development team is working on. Others felt that the approach would not scale for a different reason. For example, if a user does not know what they want, the issue is no longer app-centric. There is the possibility of not starting in the app, and instead getting taken to the app.

Some attendees noticed that the page seemed to be missing something compared to the other pages. The other pages had visuals, but the page in question did not. While some felt that text on a picture could be a major accessibility issue, and that the page should be combined with a previous page or deleted altogether, others argued that it should stand on its own, and that more information and links to the institutions should be added. The development team may want to consider having everything on one screen rather than three screens, or have some system of recovery in place, considering that apps crash all the time. Regardless of anything else, human interaction is the most important aspect.

In terms of finding aids, they are not always helpful and can perpetuate confusion. Most users are community members and do not like finding aids. They are looking for a relationship piece. They want a picture of the personal archivist who helps them find what they want. However, there are some who just want what they want and do not want a relationship with an archivist. Both populations need to be supported.

Feedback was given on Create a Request: Step 2 after the demo. In terms of the granularity for breaking down, it was determined that everything would be a fishing expedition. Users may not think of Sourcery as a place to ask about a particular topic, but that could be the diversion. Users can either ask a general question via email or ask something to be scanned. The pathway would be similar to a reference tracking tool to replace. People do not like online forms. Rather than that form sending you an email, it could be added to your Sourcery queue. An email address or a phone number should be added to the bottom of the page so that users have contact information, even if it is the email of the person fulfilling the request.

One of the attendees mentioned that if Sourcery is going to be in a college, it cannot be monocultural. Sourcery has a space and is more, “I know something and want to see more about that thing.” At some point, a user group needs to be picked and stuck with. Yet another issue discussed was that some users may want to scan, but not use an app. Is there a way for the archivist to enter this in Sourcery? For people to be their own Sourcerer? Also, if files are shared with people, do they need Sourcery to download them for free? This is something for the development team to think about.

Is there an option to put in an urgent request? This may make sense to some institutions, but not to others. If there is an urgent option, everyone would probably press urgent. It could be said instead, "What is the preferred date that the document is to be delivered?" The development team has flagged this as a challenge. This is where a chat feature could be frustrating because people may not be answering. Furthermore, as soon as a chat function is added, Sourcery will change from a very specific point of fulfillment to something different. This is not bad, but it is still something to think about. More segmentation was also recommended.

In terms of analytics, is this step an important piece to have analytics for certain types of institutions that are underpressured to justify what their staff are doing? Some people have mentioned that they would like analytics to explain to higher ups or decision makers that this is how much time was spent, how many patrons were served, countries they are from, etcetera. What is recorded about the user who is making the request? Could the system say 35% of scans went to the academic community, 60% went to the community? What will Sourcery collect, and is it dangerous to collect this? It is always helpful to quantify things in presentations to higher ups, especially for data driven places.

Create a Request: Step 3 was skipped over but briefly touched upon in previous windows. The initial screen prompted an in depth discussion that took up most of the time, so steps three and four were skipped over.

Feedback was given on Fulfill a Request: Institutional Dashboard after the demo. In the case of an archivist forgetting a page, they could be messaged through the chat. There are currently no file size upload limits, but the development team is working to add these restrictions. It was also confirmed that URLs could be provided for documents. One of the questions that came up was whether to let the researchers make substitutions, or go by a "one size fits all" approach.

More metadata is needed for each item if they are just scans. What the development team is working on right now is how this can be finished up and completed. Users need metadata back in order to do a citation. How is that information being transmitted? The institution would type in the correct citation, whatever metadata they want. However, the metadata is not attached to the file, it is attached to the request. If it is attached to the file, Tropy—which would be useful at the moment because it will provide the metadata—can automatically give researchers the chance to add information about the document. A custom metadata template from Tropy could be used.

Some attendees expressed concerns about Sourcery resorting to a gig economy and becoming untrustworthy. Others liked the idea of options, filling out metadata and pulling in information from the archives for population, keeping in mind that some people are going to want to do this thoroughly, while some people will not care. Additionally, a filter on the "in progress" is easy for the development team to implement.

Feedback was given on Fulfill Request: Step 1 after the demo. For multiple objects being shared, there would be different metadata. Having metadata attached to documents in general makes more sense and is more organized. Fields should be there, then users can write them how they want. A generic copy paste citation may be good to provide, along with an optional one, but care should be taken. Citations could be too much, because they are variable. It is better to give enough information to get it back again or give it to another user. Due to time constraints, Fulfill Request: Attachment Details, Fulfill Request: Step 2, Fulfill Request: Complete Page, and Fulfill Request: Receipt were not covered. While Fulfill Request: Chat was also not covered, the chat feature is commonly discussed throughout the charrette.

There were several questions asked during the intro. The first revolved around having generic high level thoughts about discovery in addition to access. In answer, it was stated that partners in the request process are given the chance to ask questions to the archivists, using the chat feature. The goal is to host a space where dialogue can occur to figure out what may be available and what may be of interest to users.

The development team has two ideas for how researchers might discover what they end up requesting. 1) They find it in an online file, or some description of some collection in an online file. For this the development team is trying to build tools like ArchivesSpace, hit a button within ArchivesSpace, and whatever the record is, it will populate a Sourcery request. 2) Based on a scholar's reading, they find references to things in what they are reading, and then there is a letter from a certain collection mentioned in a footnote. They then become interested in this.

This is where the open-ended language comes in. How are "researchers" and "scholars" being defined? Are these terms exclusive? There needs to be a more formal discussion about who is a researcher vs. archivist vs. scholar. Most attendees from the charrette used the terms "researcher" and "archivist," avoiding the term "scholar." There were also discussions around the terms "historian," "researcher," and "scholar." UConn uses "patrons." However, no patrons identify themselves as patrons. Someone said maybe just use "requester."

One of the attendees [Kim] asked, "Why now?" in terms of Sourcery, to which a member of the development team [Scheinfeldt] gave a debrief on what Sourcery is: a web app. Any device connected to the internet can connect to the database. Archivist is the term for someone fulfilling something. The researcher in many cases will be placing the request using a laptop, but the archivist will probably be using a phone to fulfill the request. The development team is building for both. The attendee [Kim] went on to ask if Sourcery is purely for baseline scans. The answer was that Sourcery is for showing documents and helping researchers make a decision about whether or not they should make a trip to an institution.

It was mentioned that reference scans are "down and dirty" scans. Could an institution do a a real scan, put it in a pipeline, and put it in a digital repository? Reference scans come in a range of quality. This can be adaptable to each institution. Resolutions of scans are user driven, and depend on the need of the user. Folger is putting all Sourcery scans into a digital repository. For the purposes of this discussion, care should be taken about assuming there is a difference between reference scans and archival scans. It should not confidently be said that there are reference scans and archival scans. An attendee [Kim] mentioned that the quality of the metadata is more important than the scans.

Problems identified with Sourcery at the time of the charrette included the app not having a chat feature, the ability to attach metadata, being able to see who is requesting, or a credit line to trace back to where sources came from. If a high resolution scan is sent, then it could be posted somewhere and be a copyright issue, which makes credit line important.

Day 1, Session 2: Integrating Sourcery with Existing Work Practices and Systems

The second session on the first day of the charrette focused on integrating Sourcery with existing work practices and systems. The session was an overview from the current testing partners at the time of the charrette: the University of Connecticut, Hartford Public Library, Northeastern University, and Folger Shakespeare Library.

Attendees from the University of Connecticut stated that when paywalls were dropped, participants increased by 250%. Services are made possible by student labor. Forms are on the website. If patrons request through email, they are directed to fill out a form. Requests are tracked in an Excel spreadsheet and are completed in the order they are received, with no rush orders.

Attendees from Hartford Public Library pointed out that the library does not receive many requests in a given week, or many that require more than 15-20 minutes of work. The library has a “contact us” page on their social media for sources, but they often have to share and piggy back on them. There is also only one main staff member fulfilling requests. Sourcery would improve and streamline their workflow for these reasons. The library wants to share their resources with the world and connect people, and plans to use the Hartford Times Image Morgue, which has a good number of photos from the 1950s to the 1970s.

Attendees from Northeastern University mentioned that most of their patrons, which include youth groups, come from the community, and often look at their own collections. There are two different ways that scans go through. A digital production service in the library, which includes an intensive process of adding metadata, with all scans ending up in a digital repository, and Reference Q, made via personal references or online. Between 1500-3500 scans are taken a month—using phone snaps with regular 300 dpi—and sent via

WeTransfer, a commercial product that can only send certain amounts of data through and expires after a certain amount of time. The library wants to create statistics from archival scanning, and learn to optimize processes.

Attendees from the Folger Shakespeare Library—a private research library and the largest collection relating to Shakespeare in the world—mentioned that their current process, from the imaging department to the publication of quality images, is expensive, and has a lengthy turnaround time and barriers to access. A more streamlined process, of reference librarians using smartphone images, is fast, free, and easy. The library has a reference image collection, and even though it is closed, it still posts reference images. They already know about informal sharing networks via Twitter and want to use Sourcery for peer-to-peer image fulfillment, Sourcery integrated with TROPY, and Sourcery-adjacent gathering of images from registered researchers to add to the reference image collection. The library values being open, equitable, and accessible, but as 98% of their researchers do not come from the D.C. area and have to travel, how can the library be more accessible to people beyond the reading room?

The following questions and answers came up during the session.

In what way does Sourcery fit into institutional strategies? How can Sourcery beat what is being done now?

Folger, in the process of writing a grant proposal for almost the exact same thing as Sourcery, can be asked to say a bit more about meeting those priorities pre-Sourcery. Their vision was that a user would submit a request to find aid. The UConn library used Ipads and lighting pre-Sourcery.

Do you treat a request the same if the request is made online or in person? How do you manage the point of contact?

The hope is to use a button on Sourcery to indicate what needs to be digitized, and pointing to a particular record when putting in a request.

What level of information is needed from a requester?

Whatever is collected now, along with any extra information, to navigate the intent for use. Sourcery could be used to think of the name attached to the source, but from data points that could be analyzed. There should be required fields and optional fields to include more information.

There should be an option to proceed as a guest, but there should also be an incentive to sign up with an account. Something to think about after Sourcery is the fact that users are opening themselves up to people from anywhere, and should take that into account. There could also be a button or option that informs users that they are being redirected to a particular state library.

Day 1, Session 3: Challenges and Opportunities

The third session on the first day of the charrette focused on challenges and opportunities. This session was run by dividing the attendees into five groups. Groups then brainstormed answers to the bolded questions below. They recorded their answers on large pieces of paper, then shared their findings with the larger group.

How does Sourcery alter or change reference scanning workflows? What are the challenges and opportunities?

Sourcery has the power to make archival workflows transparent. Sourcery would also allow for identifying archives of interest and zeroing in on sought after content within holdings, making content available and discoverable. Reference scans that deal with repeated requests could fulfill those requests in an automated fashion. Sourcery adds to the workflow as an additional way requests come to archives, and should be viewed as a way to get emails and calls. Working through institutions would give rise to differing perspectives, and there would be different channels of communication within an institution. It would also be imperative to let institutions know about having the same request multiple times, and saving a local copy with good metadata.

Functionalities to tweak include an automatic message that a request has been received, especially since the chat assumes immediacy, and the ability to upload an image to see if a source can be retrieved. This could also be a way to document the information. For example, the patron has pictures that can be uploaded. A possible reverse Sourcery feature would be the option to share photos back. A workflow item would be able to track what has been scanned already, along with a reference image database, to make it clear that scans are an option.

Some points to consider are: Are researchers themselves part of the staffing model? What kind of incentive system may exist? Are there ways to market Sourcery so institutions start using it to streamline their workflows?

The opportunities identified by the groups were: Disorganized mechanisms becoming centralized, streamlined, and improved; improved standardization across workflow formats; and networking, especially within the context of Special Collections and University Archives (SCUA). Content, excluding metadata or relationships, being accessible; streamlining incoming requests, which could also be an adaptive challenge; and reaching people who would not otherwise go into an institution. Creating standard workflows and being able to reduce the response time for duplicated requests or common requests. Storing quick scans in a storage area, a way to optimize scanning workflows by limiting the handling of documents; limiting emails; and importing from email inquiries or manually populating inquiries into Sourcery. This latter feature is currently being worked on, the language used being “internal request fulfillment” or “fulfilling on behalf of.” Providing an opportunity to reach new audiences and younger people; creating immense opportunities for ease of archival access; and knowing metadata workflows.

The areas the groups identified where there could be room for improvement were: Archives with little infrastructure having trouble handing off to a project to enhance discoverability, as "handing off" is the role of institutions as referral points to other institutions. Positioning Sourcery for the community at large and engaging with a larger community outside the academic sphere. The need for a device, storage, and internet access. Chats not being responded to as quickly as desired. Creating an expectation and demand and being careful about meeting that demand, and funneling all requests through a single website.

One area the groups identified as both an increasing problem and opportunity was the use of personal devices.

How does Sourcery workflow and technology changes affect our thinking about staffing and labor? What are the challenges and opportunities?

This question was asked to the larger group. Through discussions, attendees came to the agreement that staffing and labor is hard for underfunded communities. How can Sourcery travel with labor? What does it take to run archives and data? What can Sourcery do for the wider society and its understanding of nonprofits? This is a pushing out model, not a bringing in model, and a relationship needs to exist, as technological ideas cannot be pitched as sole solutions to problems.

How explicit should Sourcery be with the labor side of things? Should it be made explicit in the app and in how it is advertised? Who takes on that responsibility? The hope is that Sourcey can help facilitate labor transfer, and how many hands and minds and days it may take. However, that is more internal transparency. Is there a way to document the level of work and expertise that goes behind it? There could be more rigorous accounting on labor supply and expertise required. How do you caution against exploitation? An anonymous chat can make labor invisible. For instance, the archivist is invisible.

Other questions brought up were: Should assumptions be made about the fungibility of a reference scan? Is a big enough pool of scans actually being created?

Day 2, Session 1: Sustainability

The first session on the second day of the charrette focused on sustainability. To make Sourcery self-sustaining, it should be embedded in something larger, an arrangement that is already in place. A few questions were taken into consideration. What pricing models should Sourcery support? What are the pros and cons of having the capability of pricing options built into the app? How much will institutions be charged to use Sourcery vs. how much will institutions charge patrons to use Sourcery? Folger Shakespeare Library, for example, may charge a nominal fee of $1. To entice researchers to join, the bar to entry needs to be kept as low as possible. However, the bottom line is that Sourcery costs money.

Attendees from Northeastern University (NEU), a Sourcery testing partner, pointed out that at the initial level, the app solves many problems. The institution already pays for services like libpal, or calendar or booking systems, in their budget, so archives getting a solid modern platform for coordination could be justified. Many places would be willing to spend $2,000 or $3,000 a year on something like Sourcery. Ethically and labor wise, there are no problems. However, working with archives means dealing with a trickier world that overlaps with higher education, and NEU stated that the subscription model would not work for them.

A subscription model suggests a person subscribes to something, although there is the possibility that it may not work. A membership model is hard for international institutions to understand. The app would be available with some degree of support. Creating a hybrid model that takes the best of each—both a subscription model and a membership model—is another option, because it is likely that the institutions who need the most support cannot pay.

ArchivesSpace is a tiered membership model. If going for tiered subscription models, what are appropriate pricing targets? Should the model be based on institution size or the set of services and functionalities made available to the institution? Would a free tier for smaller institutions be considered? What would be the thresholds for various tiers? It is important to note that smaller institutions have very little technical abilities and would require a lot of money to support, even though they are not paying.

In terms of payment and features, it was determined that the main goal is not to provide more features the more a user pays, and less features the less they pay. The founding mission of Sourcery is to connect patrons with archives, and to create relationships between researchers and archivists. However, there would be "extra features," similar to Zotero.

Further discussions revolved around charging for scans and institutional revenues. For example, what are the problems with a model in which an institution charges $9 for a scan, and Sourcery takes $1? The goal is not to think of collections as neutral. Why should someone have to pay to get documents their government took away from them? The goal is also not to put money between people's access to their own community. The option for institutions to charge patrons or not will always be given. It may be best to come to Sourcery's code of ethics, and ask why there is no charge. Having a code of ethics is important, as it is hard to have a pricing model without knowing the community being targeted. There should be an explanation, in the code of ethics, that explains why this is. Institutions can decide what to do, but the downside of charging should be clearly stated.

It was decided that it would be helpful to implement a facility in which patrons can ask for a fee waiver and justification. It is fairly easy to talk about transactional billing for scanning a document, but when starting to talk about people doing fishing expeditions, that is much less quantifiable because a lot of that involves conversations between the archivist and the person fishing. How is this kind of activity accommodated in a charging model?

Furthermore, would the plan be to process transactions and cut a check once a month? Is part of Sourcery to alleviate transactional pressure, especially as it is not ideal to process small charges?

The selling of storage is a clean process. Furthermore, smaller institutions do not need as much storage due to their size. Everything about Sourcery needs to work for everyone, and the way to do that is to sell storage. For small historical societies who cannot afford to host a whole repository, Sourcery could serve as this, and even store scans for the society. There should also be some sort of system in place that allows institutions to reach out to other institutions. For example, Northeastern University reaching out to the University of Connecticut to see if they have a document, and all of this occurring within Sourcery.

Day 2, Session 2: Third-Party Fulfillment Pilot

The second session on the second day of the charrette focused on a third party fulfillment pilot.

Notes were taken during a brainstorming activity, which looked at items to consider on both the researcher and archivist side. For researchers, this included the following: assuming widespread adoption, the opening up of remote archives; travel issues; younger researchers; technology expectations; and abuse. For archivists, this included file transfers to stable locations, not using WeTransfer; the pros and cons of file maintenance and removal; different audiences and technology channels; files, emails, and users taking photos themselves; transparency; nested requests and questions; interlibrary loans; and populating metadata through bot barcode. Other matters to consider included personal device use; reference scan archives; and minimum viable metadata.

Two types of workflows were considered for Sourcery. In the case of a positive workflow, Sourcery works when the exact document is known, which results in a very easy transactional relationship. In the case of a workflow with room for growth, when Sourcery does not work as expected, institutions need to take the following steps: vet; create the pool; make this the area.

The next topic of discussion focused on hiring a researcher, which is something people already do. Although there are benefits of doing this through Sourcery, it seems like a bigger problem than Sourcery could solve. It could potentially reduce labor, but could also increase labor by the number of researchers coming into the archive. It was decided that hiring a researcher may be out of scope for at least the medium term. While it is a feature users might want, it may be better to stick to the original idea for Sourcery for the short term, as implementing it would make Sourcery an entirely different app.

Considering a minimal viable product may not be too long from now, it should be on the roadmap. If the chat thread goes beyond 30 messages, for example, a link can lead to an archivist that users can reach out to. Northeastern University uses Springshare to access a librarian 24/7, which is something paid for by the institution. A better job needs to be done of defining reference scans for both researchers and archivists. Once it goes outside of these bounds, they would have to be told to perform specific tasks.

The first step after an institution reviews a request is to ask: Is this something that can be done in 15 minutes, or is this an in-depth request to be referred to someone who can do further research? This inquiry would indicate a fork in the workflow. A list of pre-approved Sourcerers means that they have already been screened and should be allowed access to the collection.

Additional considerations discussed were issues of vetting, changing, and recruitment, and a need to disambiguate documents vs. fishing expeditions. There also exist UX issues surrounding geographical proximity. For instance, Sourcery works when the exact document wanted is known. From these discussions, a question that came up was: How do you deal with software if software is bad?

Day 2, Session 3: Advisory Board Talk Back

The third session on the second day of the charrette was an advisory board talk back.

The board members noted that there is quite a bit of drift away from a research focused perspective, which has its pros and cons. The exciting thing about Sourcery, in light of the pandemic, is the ability to get at special collections and archives remotely. However, this means doing things quite differently from what is being done today. Archives and special collections are going down two paths, including digitizing material. It will probably be centuries before a substantial amount of material is in digital form.

Several of the questions about the moral cases for access vs. the very real financial and pragmatic limitations of being able to provide access to smaller institutions were challenging. Handling demand is strikingly different for bigger vs. smaller institutions, due to larger use of third parties in smaller institutions. It would be useful in the test phase to include researchers from outside typical academic settings, to show different use patterns. This could also include the genealogy community, which already has relations to archives and special collections.

Overall, there exists a lack of clarity about where Sourcery sits within the broader array of archival services and presence of individual archives or special collections. It would be better to go to an archives' web presence, as Sourcery is not the right starting point.

Sourcery's position must be clearer in this context, and the app should also not replace many of the factors discussed. It is just one more layer. Furthermore, care must be taken about scanning things for the purpose of creating a smaller repository.

Considering a short term work plan, there needs to be a clearer description of where Sourcery fits within the workflow or other pieces of software that deal with archiving material. A starter kit will be needed to initiate Sourcery and communicate expectations of services to avoid negative user feedback. There also needs to be conversations around copyright. Sourcery should be pitched at different audiences with language ready to go for each group. Ways to incentivize testing should be figured out, and historical societies and smaller organizations should be specifically targeted.

Some key takeaways of Sourcery is that the app is a way to make it easier for researchers to request materials and archivists to fulfill those requests. The purpose of Sourcery is not to compete, but to replace old ways of archiving materials to streamline workflows. Sourcery's big value is not in pulling in individual documents; it's helping users know what's in a collection and identifying promising resources. A stronger mission statement and code of ethics will help guide Sourcery's development and also be important for the general public. Expectations will be managed through both mission statements and a minimal viable product.

Each institution utilizing Sourcery could have a "profile," which would give them a certain amount of autonomy and customization in the structure. Institutions would have control over how they handle document requests, as they may need to have their own approach to using Sourcery in order for its implementation to be possible. It would help to do work on the settings page for institutions sooner rather than later, and be a good idea to mock up the various choices an institution can make in the next version of Sourcery. It is also important to start thinking about which of the settings institutions may want: to charge or not to charge, to offload to third parties, and so on. Currently, there is no charge for using Sourcery, but there will be using striped interfacing. It is also important to note that there are companies that could be sued for using Sourcery.

The chat feature should include hours so users can see when an archivist is available. The chat should also be attached to every request and integrate tasks such as emailing and talking with patrons, allowing for everything to happen in one spot. There should also be an option to proceed as a guest when using Sourcery. Finally, an important question to consider is: Has a proper distinction been made between metadata and citations?

Questions that arose:

- Day 2: Institutional Offload Model
  - Does the institution choose the researcher? Do they recommend the researcher?
  - Who sets the price? Is there a rating system?
  - Who is responsible for the quality?
  - Are the Sourcerers vetted and approved, or is it open to everyone?
  - Is this similar to the third party or "Hire a Researcher?" Is the starting point just different?

- Day 2: Third Parties
  - Do researchers want to hire a third party?
  - Are they “approved?” Who approves? Sourcery? Institutions?
  - At what point does the institution hand them off? How?
  - Is this within scope?

Next Steps

The next steps for Sourcery include writing a Code of Ethics; editing current designs and codes to align with a one-page request workflow, enhanced fulfill process, and archives space plugins; and identifying and reaching out to smaller institutions to bring on as testing partners.