



Reporting Your Chapter History: the Process

CHLA/ABSC recognizes the value of its many Chapters, and their contributions toward building the capacity of the Association, its members, and Canadian health librarianship. Local Chapters are encouraged and supported in their efforts to document the history of their development and activities. The following guidelines will assist Chapters in documenting their history.

Chapter Executive: Establish a Working Group

- Define the project, strike a working group, and develop Terms of Reference
 - Mandate: Outline the scope of the project
 - Objectives: What are the goals? What do you expect to achieve?
 - Expected outcomes: What are the end-products? Examples are: a published article, presentation, poster, brochure, feature on the Chapter website, submission of the Chapter documents to appropriate archives
 - Composition of the Working Group: Ensure that you have a Chair to lead the project, and sufficient members-at-large to complete the work
 - Timelines: Establish a timeline that sets milestones for the project in order to maintain momentum and to provide impetus to stay on target
 - Meetings: Schedule regular meetings to ensure that timelines are met
 - Reports: Provide status reports to the Chapter Executive, funding agencies, and Chapter members
 - Resources: Seek applicable funding/grants to help support project expenses such as transportation, telecommunication, facilitator, recording equipment, stationery, printing, photocopying, and catering
- Inform Chapter Members of the project and its goals, and solicit volunteers
 - At meetings – Annual General Meetings, general and special meetings
 - At Chapter events such as workshops and conferences
 - On the Chapter Listserv
 - On the Chapter website

Chapter Working Group: Do Your Homework

- Select a Chair for the working group
- Identify a Recorder to document meetings and activities, to facilitate communication and to provide documentation for subsequent reports
- Develop a timeline for the project
- Schedule regular working group meetings
- Conduct preliminary research for the history project

- Contact CHLA/ABSC: Has another Chapter completed a similar project? Are there CHLA/ABSC guidelines or policies that should be followed?
- Conduct a literature search - learn from other similar projects
- Check websites of other Associations: How have other Associations/Organizations documented their history?
- Consider the ethics of the project: Are there ethical implications? What are the responsibilities of Working Group members in the information gathering process? Contact local or institutional authorities regarding the ethical implications of personal interviews, focus group sessions or recorded conversations

The Process

While the steps presented here may appear linear, many tasks and activities may be carried out in parallel.

- Identify project tasks and assign responsibilities
- Gather and organize existing Chapter information
 - Sources include Minutes of AGMs and Executive meetings; correspondence; Presidents' reports; Treasurers' reports; event publicity; membership lists
 - Review BMC/JCHLA twice - once for Chapter activities; a second time for CHLA/ABSC activities that may provide context
 - Prepare a list of previous Executive members and their current contact information
 - Contact former Executive members to solicit existing documentation, photos, names of other people relevant to the project, etc.
 - Post a message to the Chapter listserv
- Review gathered information to identify significant events, unclear or missing information, and emerging trends for later investigation, clarification or elaboration
- Based upon this review, develop a list of questions to be posed during interviews, or focus groups, or to the Chapter listserv
- Conduct interviews, focus groups and/or oral history sessions with current and former Chapter members. The choice of information gathering method depends upon the project objectives, end-products, and the availability of resources, time, and expertise.

Interview how-to:

- Identify participants for interviews -- Chapter founders, previous and current Chapter and/or Executive members
- Contact the selected individuals and arrange interview times
- Seek permission from participants to record the interview, either with video, audio, or note taking
- Rent or borrow recording equipment, or arrange for a note-taker to be present at each interview
- Conduct the interviews, in person or by telephone
- Transcribe the interview notes as soon as possible in order to ensure accuracy

Focus Group how-to:

- If funds permit, arrange for a suitable facilitator to lead the focus groups - ideally someone with experience in libraries, healthcare, and/or history projects
- Meet with the facilitator to discuss project objectives, the focus group process and potential questions; confirm the facilitation fee and what it includes
- Identify participants for the focus group sessions - Chapter founders, previous and current Chapter members, Executive members
- Determine the number of focus groups required and the number of participants in each group
- Decide on potential dates and times
- Prepare standard text for a print, email or telephone invitation
- Contact selected individuals to determine interest and availability
- Book the venue for the focus group sessions
 - consider a central location accessible to both public transportation and ample parking
 - inquire about capacity, seating arrangements and catering policy
- Contact the focus group participants to confirm dates, times and venues
- Select note-takers and/or arrange for the sessions to be recorded via audiotape or videotape
- Arrange for refreshments (highly recommended)
- Conduct focus group sessions
- Transcribe the notes as soon as possible to ensure accuracy
- Review the consolidated notes with the working group members
- Be sure to thank participants! A note of thanks with a small token of appreciation (e.g. gourmet chocolates) is ideal

Oral History how-to:

- Oral history projects require extensive planning and resources - both fiscal and human
 - Excellent guidelines for oral history projects have been developed by both the Medical Library Association and the Oral History Association. It is recommended that these guidelines be referred to in the development of a true and accurate Oral History.
-
- Develop an inventory of all documentation, artifacts and anecdotal information
 - Review all documentation, identifying highlights, special events, examples of advocacy, educational offerings
 - Look for themes/changes in activities/programming over the time span

Writing the History

- Develop a timeline that includes the establishment of the Chapter, CHLA endorsement, notable activities and events, awards, and Chapter milestones
- Review expected project outcomes
- Assign tasks to Working Group members
- Create a wiki or other networking tool to facilitate group communication and participation in the development of the end-products

Dissemination

- Share the fruits of your labour! Plan to promote your Chapter History to the widest audience, particularly within your Chapter's geographic area
- Suggestions include:
 - Present your Chapter History at a conference such as CHLA/ABSC's annual conference
 - Submit an article for publication in library journals such as JCHLA
 - Include both the process and the Chapter history on your Chapter website
 - Host a dissemination event for your Chapter
 - Update this Fact Sheet to share lessons and tips that you have learned

Project Evaluation & Wrap-up

- Have you achieved your project goals and objectives?
- Were the timeline and project plan sufficiently followed?
- Were the end-products well done, completed on time, and within budget?
- Have you ensured that the Chapter Executive and members are informed of the completed Chapter history?
- Have you acknowledged funding agencies appropriately?
- Did you submit a final report on the project and expenditures to CHLA/ABSC or other funding agencies if required?

References

Medical Library Association Oral History Committee. 2005. **MLANET**. *The Medical Library Association Oral History Project Manual*. 6th Revised Edition.

Oral History Association. 2000. *Oral History Evaluation Guidelines, Oral History Association, Pamphlet Number 3*. Adopted 1989, Revised Sept. 2000.

Fact Sheet prepared by: Northern Alberta Health Libraries Association (NAHLA) History Working Group - Marlene Dorgan (Chair), Liza Chan, Trish Chatterley, Connie Clifford, Orvie Dingwall, Janice Varney

May 23, 2007