Designing the Future of Archival Discovery & Delivery:

The Lighting the Way Forum

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Society of American Archivists Research Forum – August 5, 2020

#LTWForum / https://lightingtheway.stanford.edu/

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The Project

Lighting the Way: A National Forum on Archival Discovery & Delivery

September 1, 2019 — August 31, 2021

https://lightingtheway.stanford.edu/

Key concepts

Archival discovery and delivery

What people & systems do to support finding, accessing, and using material from archives and special collections

Includes archival description, digital object delivery, request management, interpretation, specialized environments

Integration

Getting systems to work together as a coordinated whole; "functional coupling"

Impacts researchers and those who work in archives

Relies heavily on people to accomplish

Annotated bibliography: http://bit.ly/ltw-abstracts

List of systems/glossary: http://bit.ly/ltw-systemsglossary

Zotero group: https://www.zotero.org/groups/2371748/

Foundational research questions

- What systems support archival discovery and delivery?
- How do those systems need to work together from a functional and technical perspective?
- Why is a specific institution or project integrating those systems? What push or pull factors do these systems present?
- How are those systems being integrated?
- Who (from a staff perspective) is involved in specifying, developing or maintaining the integration work?
- Have there been specific successes or challenges with specific systems or integrations?
- Are there workarounds are in place due to limitations in resources?
- What technical or institutional contexts shape systems implementation and integration?
- Are any ethical or legal concerns represented in integration?

Forum goals

- To allow participants to **see, map, and build connections** – between one another, their work, the systems they rely on, and the communities they serve
- To **identify and organize around shared opportunities and challenges**, as defined by participants during group activities
- To **provide a platform for engagement** with the project, leading to participation in other project activities

Forum Application process

- Call for participation and brief application form
- Applications evaluated with rubric based on project goals:
  - Practitioner focus
  - Inclusion of marginalized and underrepresented voices
  - Current engagement with and ongoing commitment to project
- Over 200 applicants, 71 participants selected for Forum

Forum Design: Inclusion & Facilitation

- Community Agreements and Code of Conduct
  - Distributed in advance of Forum
- Facilitation Roles
  - Lead Facilitator - provide overall direction for exercise
  - Table Facilitator - ensure participation at local level
  - Notetaker - document important conversations and questions

Monday, February 10		Tuesday, February 11	Wednesday, February 12
Welcome / Logistics / Acknowledgements (15 mins)		Recap of Day 1 / What's Today (15 mins)	Recap of Day 2 / What's Today / Logistics (15 mins)
Project Team Presentation (15 minutes)	← LIVESTREAM / RECORDING ↓	Activity 3A - Trading Cards (15 minutes)	Activity 7 - Social Network Webbing (60 minutes)
The Evolving Systems Ecosystem (45 mins)		Activity 3B - Context Map (75 minutes)	
Networks and the Big Picture (30 minutes)			Activity 8 - Who/What/When Matrix (30 mins)
Break (15 minutes)		Break (15 minutes)	Break (15 minutes)
Ethical, Legal, and Cultural Concerns (45 minutes)		Activity 4 - TRIZ (60 minutes)	Retrospective (30 minutes)
			General Q&A / What's Next? (30 minutes)
Impacts on Public Service and Outreach (45 minutes)			Lunch / social discussion allowing for potential followup (120 minutes) - **Forum officially concludes at 2:00**
Lunch (60 minutes)		Lunch (60 minutes)	
Activity 1 - Mad Tea (60 minutes)		Activity 5 - Affinity Map; 2 tables/group (90 minutes)	
Break (30 minutes)		Break (30 minutes)	
Activity 2A - Speedboat (45 minutes)		Activity 6A - 15% Solutions (30 minutes)	
Activity 2B - Low-Tech Social Networking (45 minutes)		Activity 6B - 25/10 Crowd Sourcing (60 minutes)	
Retrospective + Prep for Day 2 (30 minutes)		Retrospective + Prep for Day 3 (30 minutes)	

Forum Design: Breakout Activities

- Use proven human-centered design methodologies:
  - Ideation sessions and use of lateral thinking
  - Divergent/emergent/convergent model
- Drawn from *Liberating Structures* and *Gamestorming*

Henri Lipmanowicz & Keith McCandless, *The Surprising Power of Liberating Structures*. Liberating Structures Press, 2014.
Dave Gray, Sunni Brown, & James Macanufo, *Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers*.
    O'Reilly, 2010.

In Detail: Who/What/When Matrix

- Designed to identify specific next steps and individuals responsible for moving them forward.

- Built on earlier exercise: ways to support the "top 10 ideas" generated from the 25/10 Crowdsourcing exercise generated on Day 2.

- Final exercise of the forum; produced a tangible deliverable for participants.
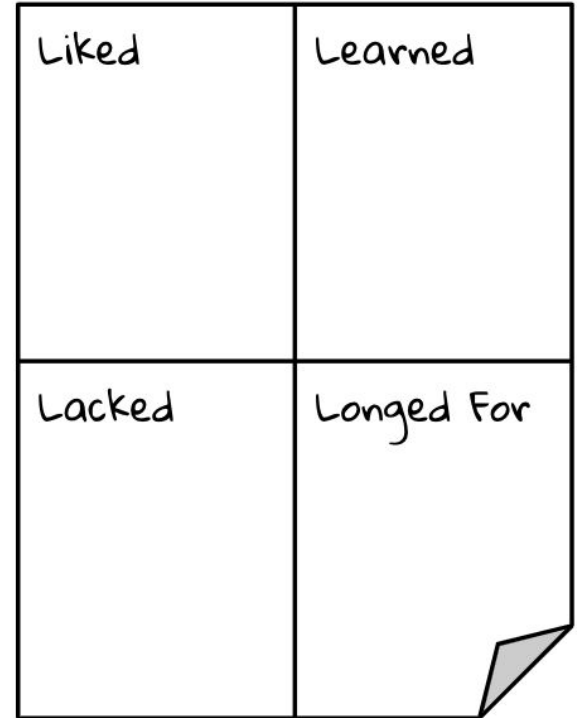
In Detail: Who/What/When Matrix

- As individuals:
  - Identify at least one concrete action you can personally commit to taking on in the next year. (10 minutes)
- In groups of two or three:
  - Discuss, clarify and refine the proposed actions. (10 minutes)
- Add actions to large sheet of paper, indicating:
  - **Who** is taking the action.
  - **What** action they are committing to.
  - **When** that action will take place.

Evaluation and feedback

- Daily group retrospective using the 4 L's format
  - **Liked** - *what did you like?*
  - **Learned** - *what did you learn?*
  - **Longed** - *what did you long for?*
  - **Lacked** - *what was lacking?*
- Created opportunity to modify the next day's activities and/or course correct

Liked	Learned
Lacked	Longed For

Survey Results

Enjoyed the most

- *meeting people* and *hearing from colleagues in a variety of different roles*
- *"cooperative and optimistic spirit"* of the participants and facilitators
- attendees want to **adapt activities** for use at their home institutions

Enjoyed the least

- *scope creep*
- more *practical and explicit discussion of technology and systems*
- a *deliverable* from the forum to help focus the activities
- *the days were too full without enough time for personal reflection*

What people learned

- understanding of *shared challenges* across institutions
- *collaborative efforts to address archival delivery and discovery are underway*
- *innovative and adaptable practices* to bring back to their institution

Most valuable thing project can offer

- *a community of practice*
- *interactive virtual meetings*
- advice on *tool selection* and *sharing of workflows, systems, and procedures*
- *deeper conversations on nuanced topics*

Emerging themes from Forum

- Leadership skills are critical to success in improving archival discovery and delivery

- Collaboration, strategic alignment, and shared development
    - "Virtual reading rooms" as promising area of focus

- UX research, user studies, and accessibility

- Political, economic, and structural factors (precarious labor, systemic racism, etc.) seen as impacting archival discovery and delivery

Future work

- Determining engagement strategies and focus shifts in response to pandemic-related project delays

- Working meeting (January 2021, tbc)

- Organizing and seeking written contributions for "handbook" deliverable (~5 pages)
  - Case studies/position papers on archival discovery & delivery
  - Intended as a resource that includes detail on needs, systems integrations, or opportunities for further collaboration

Thank You!

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For more information, visit https://lightingtheway.stanford.edu/

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