Lighting the Way

Improving discovery and delivery for archives and special collections
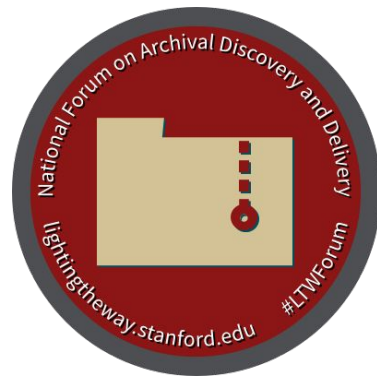
National Forum on Archival Discovery and Delivery
lightingtheway.stanford.edu
#LTWForum

Dinah Handel and Mark A. Matienzo
OCLC Works in Progress Webinar, July 27, 2021
https://lightingtheway.stanford.edu/

INSTITUTE of **Museum** and **Library** SERVICES

Introductions

Mark A. Matienzo

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Background

- Informed by trends to improve discovery, access, and delivery to archival collections and systems integration

- Opportunities to put a practitioner-centric focus on projects focused on technology and systems integration

- Informed by past work of the OCLC Research Library Partnership, including Chela Weber's *Research and Learning Agenda for Archives, Special, and Distinctive Collections in Research Libraries*

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

- Implementing and supporting this function is fundamentally collaborative in nature

Project goals

- Map the ecosystem of archival discovery & delivery
- Develop conceptual and actionable recommendations for archival discovery and delivery that responds to technical, ethical, & practical concerns
- Build a shared understanding between archives, library, and technology workers
- Activate a diverse group of participants to develop and adopt recommendations and findings across institutional contexts, capacities, & software platforms

Project activities

- Meetings
  - Lighting the Way Forum (February 2020)
  - Lighting the Way Working Meeting (April-May 2021)
- Research, writing, publications, and communications
  - Foundational research (pre-Forum)
  - Project handbook (working meeting group writing)
  - Project reports (Forum report published November 2020)
  - Presentations and other publications

Unleashing and including everyone

- Core principle: *We believe everyone has something to contribute; not everyone needs to be a self-identified expert*

- Use of **community agreements**, **code of conduct**, and **facilitator commitments** as a baseline of interaction

- Conscientious choice of facilitation methods to encourage participation

Liberating Structures

Liberating Structures principles

1. Include and unleash everyone
2. Practice deep respect for people and local solutions
3. Build trust as you go
4. Learn by failing forward
5. Practice self-discovery within a group
6. Amplify freedom and responsibility
7. Emphasize possibilities: believe before you see
8. Invite creative destruction to enable innovation
9. Engage in seriously-playful curiosity
10. Never start without clear purpose

Liberating Structures design elements

1. Structuring invitation (what am I asking you to do?)

2. How participation is distributed

3. How groups are configured

4. How space and materials are arranged

5. Sequence and allocation of time

In-Depth Example: TRIZ

Goal: Identifying negative behaviors we participate in and how they influence our work

Space/materials: Small group, with paper or virtual whiteboard

Participation: Everyone involved is included and has an equal opportunity to contribute

Group configuration: Table (Forum), topic group (working meeting)

Sequence of steps & time allocation:

1. Introduce activity: How do we achieve the worst possible result and maximize that?

2. Identify/document "antigoals" or barriers for 5 minutes.

3. Identify your own behavior similar to the antigoals (5 mins).

4. Identify what you need to do to stop this behavior (5 mins.)

5. Reflect and discuss to inform changing your behavior (5 mins.)

Lighting the Way Forum (Feb. 2020)

Participant selection

- Brief application for participants evaluated with rubric based on project goals

- 200+ applicants; 71 participants selected

Forum structure/design

- 2 ½ days

- ½ day of presentations (livestreamed)

- Remainder: facilitated exercises, mostly in groups of 7-14 people

The Forum's goals: intentionally fuzzy

Visualize, map, and build connections between one another, their work, the systems rely on, and the communities they serve

Organize around shared opportunities and challenges identified by participants

Provide a platform for engagement with the project including future participation
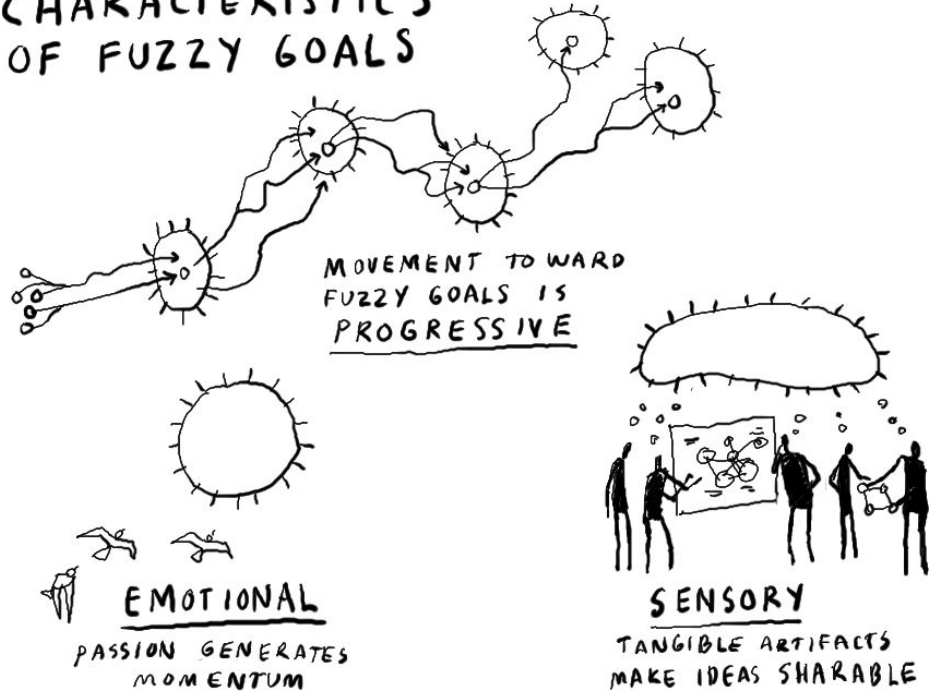

CHARACTERISTICS OF FUZZY GOALS
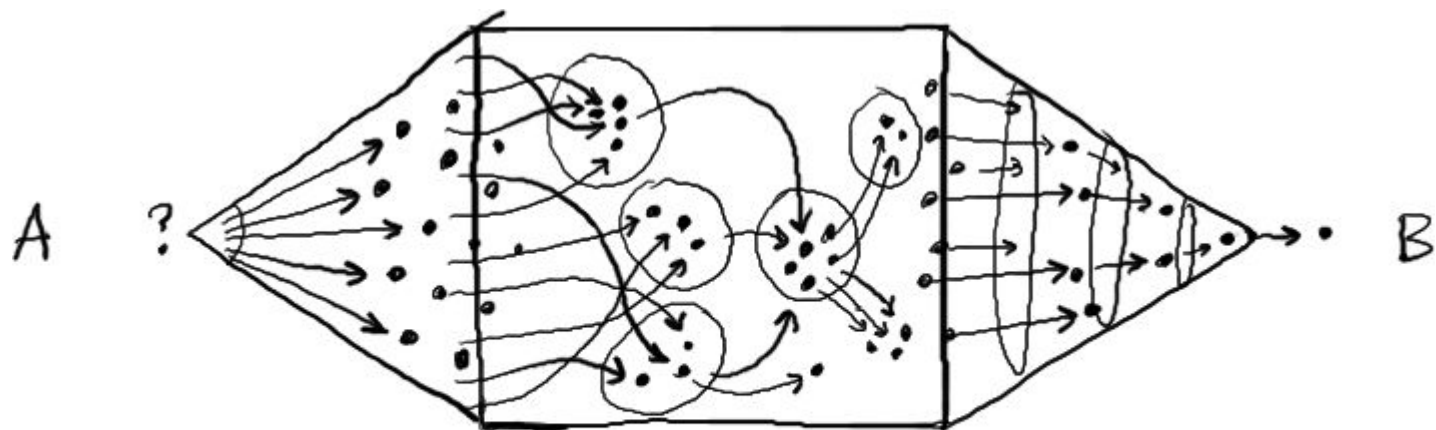
MOVEMENT TOWARD FUZZY GOALS IS PROGRESSIVE

EMOTIONAL
PASSION GENERATES MOMENTUM

SENSORY
TANGIBLE ARTIFACTS MAKE IDEAS SHARABLE

Image credit: Gamestorming

A ?   B

OPENING   EXPLORING   CLOSING
(DIVERGENT)   (EMERGENT)   (CONVERGENT)

ACT 1   ACT 2   ACT 3

SET THE STAGE   EXAMINE   CONCLUSIONS
DEVELOP THEMES   EXPLORE AND   DECISIONS
IDEAS   EXPERIMENT   ACTION
INFORMATION

Image credit: Gamestorming

Emerging themes from Forum

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

- Collaboration, strategic alignment, and shared development

- UX research, user studies, and accessibility

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

Lighting the Way Working Meeting
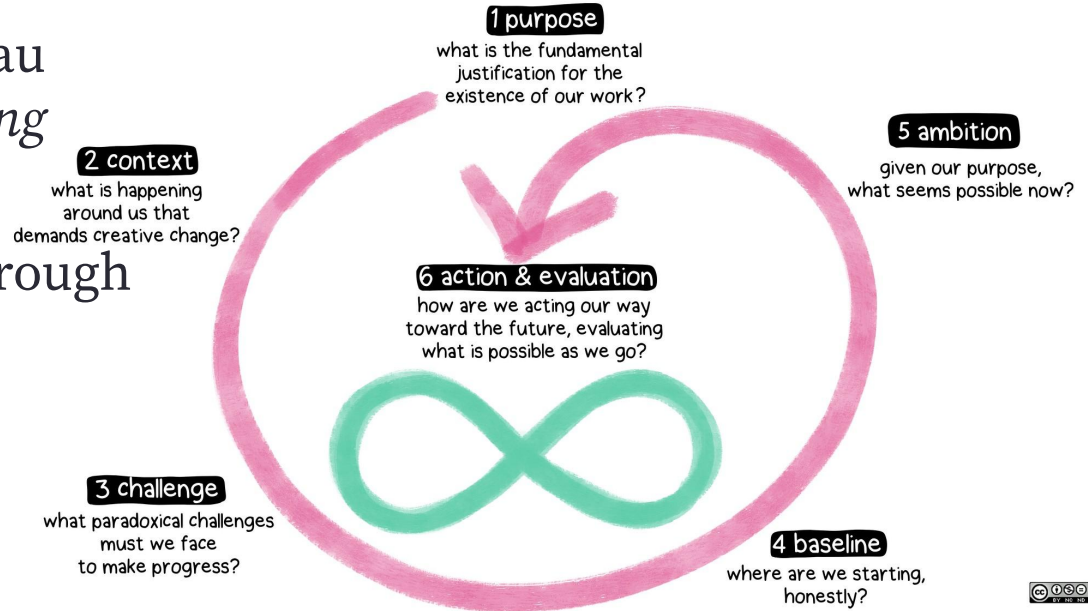
Participant selection

- 24 groups applied, 9 were selected

- Groups of 3-9 people per topic

Forum structure/design

- Explore and expand on topics from the forum

- Four two-hour meetings over six weeks

- Facilitated exercises using the Strategy Knotworking model

Strategy Knotworking

- Model developed by McCandless and Schartau (2018) based on *Liberating Structures*

- Iterative progression through six strategic planning questions as **collective activity**

1 purpose
what is the fundamental justification for the existence of our work?

2 context
what is happening around us that demands creative change?

5 ambition
given our purpose, what seems possible now?

6 action & evaluation
how are we acting our way toward the future, evaluating what is possible as we go?

3 challenge
what paradoxical challenges must we face to make progress?

4 baseline
where are we starting, honestly?

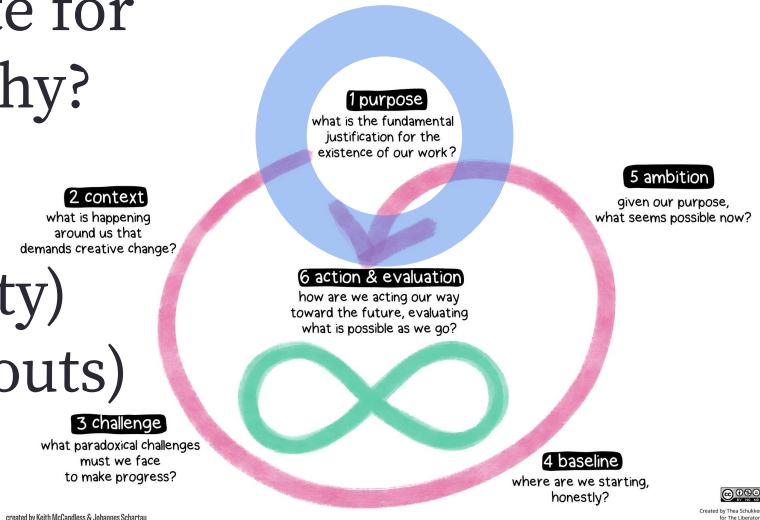created by Keith McCandless & Johannes Schartau

Session 1: Purpose

What is the fundamental justification for the existence of our work?

What is the future we want to create for archival discovery and delivery? Why?

Activities:

- Spiral Journal (individual activity)
- Impromptu Networking (breakouts)
- Exploring Purpose (group)

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created by Keith McCandless & Johannes Schartau

Created by Thea Schukken for The Liberators

Session 2: Context & Challenge

Context: What is happening around us that demands creative change?

Challenge: What paradoxes must we face to make progress?
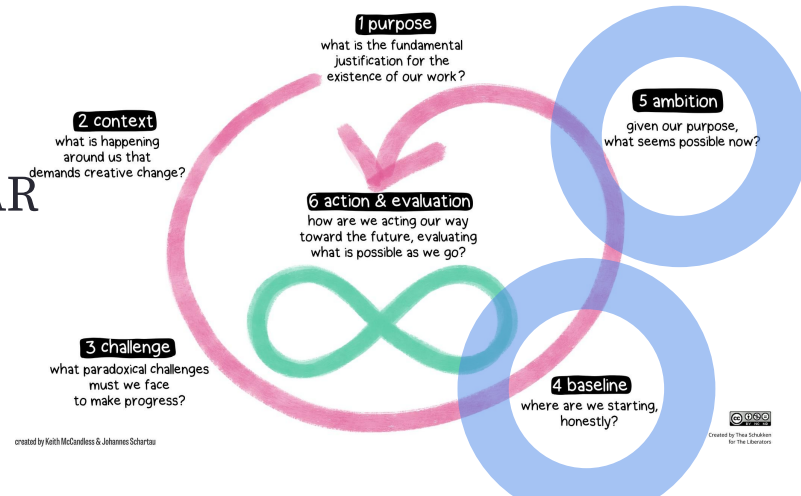
Activities:

- Context Map
- TRIZ
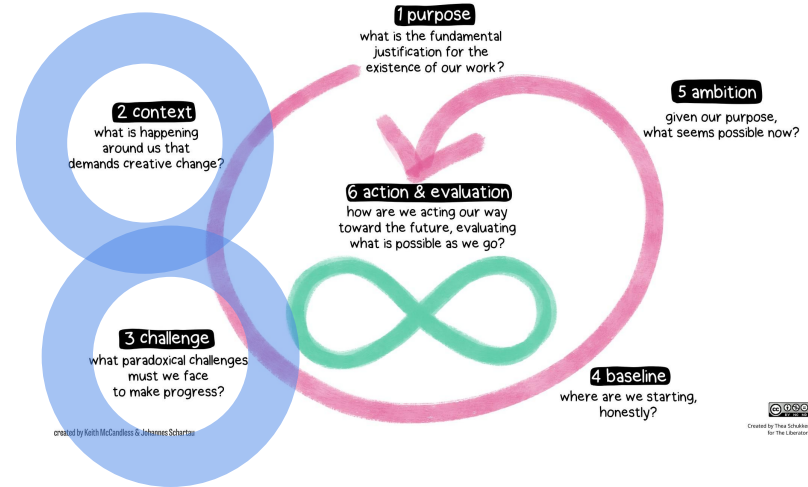
Session 3: Baseline & Ambition

Baseline: Where are we starting, honestly?

Ambition: Given our purpose, what seems possible now?

Activities:

- What, So What, Now What?
- **Optional:** Generative Relationships STAR
- Impact/Effort Matrix
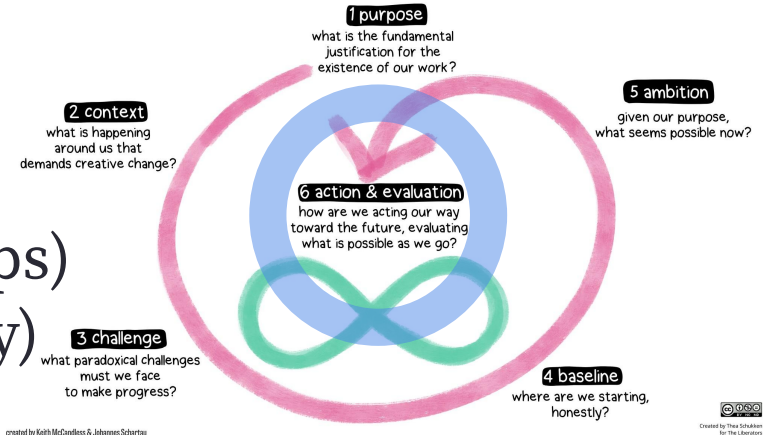- **Optional:** Discussion time for writing

Session 4: Action and Evaluation

How are we acting our way toward the future, evaluating what is possible as we go?

Activities:

- Lightning talks (plenary)
- 4x4 Writing (individual)
- Conversation Café (mixed groups)
- Retrospective/Wrap-up (plenary)

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Created by Thea Schukken for The Liberators

Working meeting feedback

- Overall use of facilitated methods were successful
  - Broader conceptual frameworks can be challenging to introduce
  - Helped unleash and include everyone!
- Getting early insights into work in progress was valuable
- Provided space for connection and strategic thinking during COVID-19 pandemic

Participant contributions

- Connecting on Principles: Building and Uncovering Relationships through a New Archival Discovery System

- The Power of Parallel Description: Wikidata and Archival Discovery

- Speeding Towards Remote Access: Developing Shared Recommendations for Virtual Reading Rooms

- Lost Without Context: Representing Relationships between Archival Materials in the Digital Environment

- A Call to Action: User Experience & Inclusive Description

- Facilitating Seamless Access Through Collaborative Workflows, Advocacy, and Communication

- Playing to our Strengths: Self-Assessment Criteria for Access and Discovery in Small Archives

- Inviting and Honoring User-contributed Content

- Access is People: How Investing in Digital Collections Labor Improves Archival Discovery & Delivery

- Maximizing Good: An Inquiry-Based Approach to Minimal Description for Online Archives

Emerging trends and themes

- Archival discovery and delivery as shared responsibility
  - Necessity of collaboration across units/job types
  - Value of working across and within your institution
- Technical challenges and opportunities cannot be understood in isolation from cultural/social settings
- Labor practices and resource allocation have impacted strategic thinking in archives, often negatively
- Providing time, space, and structure is critical for people to collaborate on strategic challenges

Wrap-up and next steps

- Publications to come
    - Project handbook of written contributions from Working Meeting participants
    - Synthesis of Working Meeting and project activities as final report
- Feedback on sustaining broader spaces for collaboration - contact us!
- Opportunities to use and expand upon facilitation methods

Thank You!

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- *Additional Facilitators: Michelle Dalmau (Forum), Wendy Hagenmaier (Working Meeting), Christie Peterson (Forum), Sarah Seestone (Forum)*
- *Forum Participants:* https://purl.stanford.edu/rt078dm2196
- *Working Meeting Participants:* https://library.stanford.edu/blogs/stanford-libraries-blog/2021/04/launching-lighting-way-working-meeting