The Care and Maintenance of Archival Innovation:

The Lighting the Way Working Meeting as incubator for a sociotechnical investigation of archival discovery & delivery

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

Problem statement

- We need to identify flexible models for inclusive, exploratory collaboration to inform future developments, building on the past work of the 2020 Lighting the Way Forum.

- Archives workers still find collaboration challenging when looking to improve archival discovery and delivery, both within and across institutions (see Matienzo et al. 2020)

- The COVID-19 pandemic has exacerbated this challenge, given cognitive overload and lack of time for strategic thinking and planning.
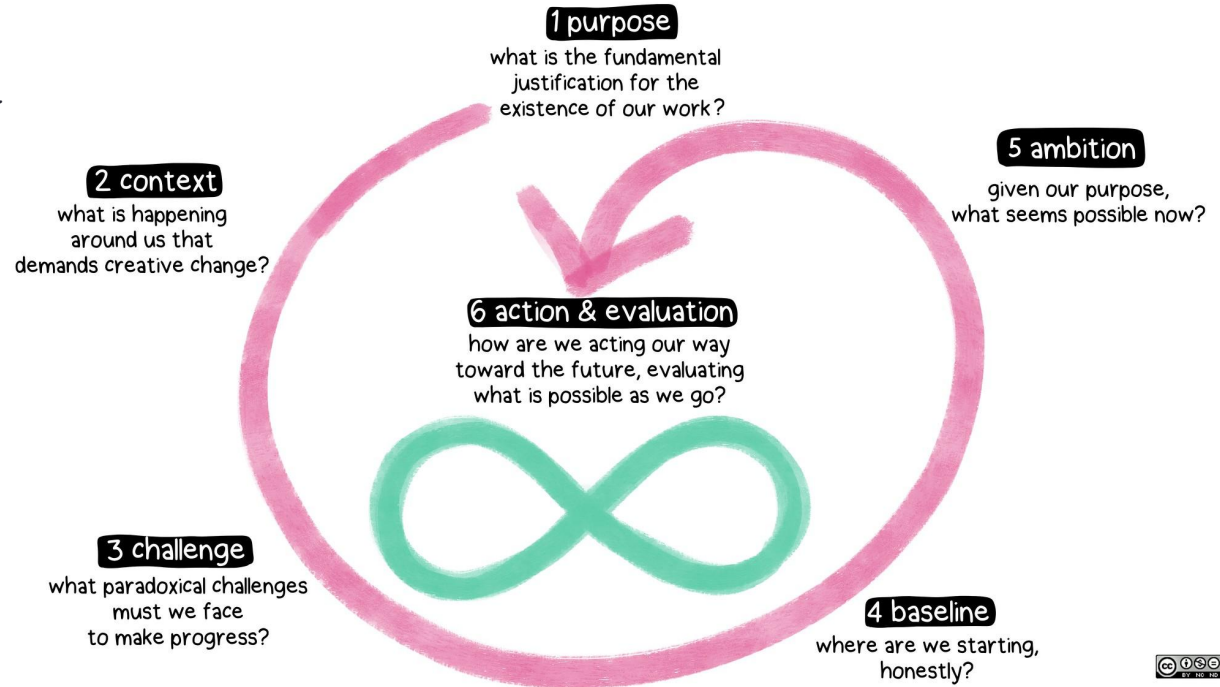
Working Meeting overview

- Provide participant groups a supportive environment to explore topics related to archival discovery and delivery, culminating in a written contribution

- Application process intended for groups and individuals and included request for 250-word abstract
  - Received 24 group applications (100 individual participants)
  - Accepted 9 groups (51 participants; 2 groups merged)

Working Meeting design

- Organized as four two-hour sessions on Zoom across six weeks (first and last plenary; others group-focused)
    - Additional tools: Google Docs, Google Jamboard, PollEverywhere
    - Some groups organized optional additional working sessions
- Groups had assigned facilitators to support their work throughout the sessions
- Intended to build upon success of using *Liberating Structures* methods (Lipmanowicz and McCandless 2014) for 2020 Forum's facilitated activities

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

Activities

Session 1: Purpose
(Plenary)

- Spiral Journal (individual)
- Impromptu Networking (random groups)
- Purpose to Practice* (topic groups)
- 4Ls retrospective (asynchronous)

* Adapted/shortened version

Session 2: Context / Challenge
(Topic Group)

- Context Map
- TRIZ
- 4Ls retrospective (usually asynchronous)

Session 2: Baseline / Ambition
(Topic Group)

- What, So What, Now What?
- Impact/Effort Matrix
- (optional) Generative Relationships STAR
- Collaborative writing/discussion time
- 4Ls retrospective (usually asynchronous)

Session 4: Action and Evaluation
(Plenary)

- 4x4 Writing (individual)
- Conversation Café (random groups)
- 4Ls retrospective (synchronous/plenary; gathered through PollEverywhere)

Evaluation

- Participants and facilitators sent feedback survey (response rate $\cong$ 58.33%)

- Closed questions: Net Promoter Score and other quantitative satisfaction metrics; capacity building; how they found out about the project

- Qualitative questions on what they liked most/least; their perceived most valuable outcome of the project; what they learned

Results

- Overall use of facilitated methods were successful
  - Some lack of familiarity/skepticism with Liberating Structures or Strategy Knotworking; purpose is occasionally unclear
  - Some desired more unstructured time for discussions
- Most concern was around deadlines for writing and pace of sessions
- Getting early insights into work in progress was valuable

Important themes from survey

- Providing a human- and care-centered approach for collaboration that acknowledges archival labor was profoundly valued

- Technical challenges in archives are now better understood as cultural and social challenges

- Providing time, space, and structure is critical for archives workers to face strategic challenges together

- Identifying additional spaces and venues for continued or new collaboration is vital
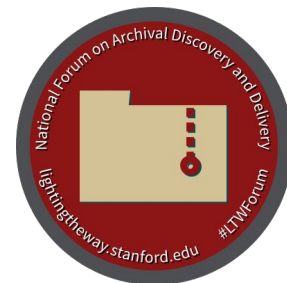
Discussion

- Feedback suggests a strategic thinking or long-term vision gap for archival discovery and delivery (cf. Blumenthal 2020)

- Sociotechnical contexts of archives as workplaces may be overlooked despite research on recordkeeping as/in sociotechnical systems (e.g. Hedstrom 1991; Summers 2020; Gunn 2020)

- Future design and strategic planning work requires a deeper understanding of affective responsibilities of archives workers (Caswell and Cifor 2016) informed by other research in feminist HCI and STS (e.g. Bardzell 2010; Wagman and Parks 2021)

Future work and research

- 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
- Opportunities to use and expand upon facilitation methods

Thank You!

References

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