



Facilitating Practitioner-Led Strategic Planning in Times of Chaos

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<https://exhibits.stanford.edu/lightingtheway>



Abstract

Lighting the Way was a two-year IMLS-funded project to imagine generative futures for archival discovery and delivery. It engaged archives, library, and technology workers through facilitated activities at an in-person 2.5-day Forum and a virtual Working Meeting, allowing participants to explore big picture issues as well as local successes and challenges. With careful planning and the right mix of freedom and structure, we successfully helped people transcend some of the stress and chaos of working during COVID-19. This helped participants assess past work and identify new opportunities, and informed a group writing process. Using these group contributions, the project published an edited volume of 10 chapters focused on change, opportunity, and collaboration.

Project goals

- Map the ecosystem supporting archival discovery and delivery
- Develop both conceptual and actionable recommendations for technical, ethical, and practical concerns related to archival discovery and delivery
- Build a shared understanding between archives and technology workers undertaking this work
- Activate a diverse group of project participants to adopt the recommendations and findings across contexts, capacities, and platforms



Participants in the Lighting the Way Forum, held in February 2020 at Stanford University

Key Concepts

Archival discovery and delivery is how the Lighting the Way project describes how people, processes, and systems support finding, accessing, and using material from archives. It recognizes the variety of roles and responsibilities to underscore its complexity and interdependency, being more expansive than focusing on a purely transactional IT customer/service provider relationship.

Integration is the use of processes or tools to join systems to work together as a coordinated whole, which provides a “functional coupling” between systems. Inadequate integration for archival discovery and delivery not only impacts researchers, but also those responsible for those functions and systems. Integration also requires close collaboration across job roles and responsibilities, departments, and organizations, and thus also relies on relationships.

Project principles

The project was informed by a set of principles recognizing the relationality necessary for this work:

- We believe everyone from our core audiences has something to contribute; not everyone needs to be a self-identified expert.
- We focus on shared and holistic concerns and recommendations, rather than focusing on specific technologies or tools.
- We enable the adaptability of our work across contexts, communities, and levels of resourcing.
- We develop ideas consciously as an inclusive expression of professional ethics and values.

Conceptual design for project facilitation

Guided by the project's principles, the project and its events were intended to be inclusive opportunities for collaboration, informed by the experience of the participants. During project conception and planning for its events, the project team was inspired by methodologies used in human-centered design. Based on the past experience of other facilitators and discussions with the project's participant advisors, the project primarily used methods drawn from the **Liberating Structures** framework developed by Lipmanowicz and McCandless.

We also needed to design an inclusive space, which led to development of our Community Agreements and Code of Conduct.

Participant engagement

- Forum: 2.5-day meeting with 70 participants, held in person February 2020 at Stanford University, intended for participants to draw connections between their work
- Working Meeting: virtual meeting (4 2-hour sessions held across 6 weeks from April-May 2021) with 50 participants, intended to foster contributions to an edited volume (*The Lighting the Way Handbook*)

Liberating Structures in use

- **Forum:** Mad Tea, TRIZ, 15% Solutions, 25/10 Crowd Sourcing, Social Network Webbing; supplemented by Trading Cards, Speedboat, Low-Tech Social Network, Context Map, Affinity Map, and Who/What/When Matrix
- **Working Meeting:** Impromptu Networking, Purpose to Practice, TRIZ, What/So What/Now What?, Conversation Café; supplemented by Spiral Journal, Context Map, 4x4 Writing, 4Ls Retrospective

Lessons learned

- **Archival discovery and delivery as ecosystem:** requires the integration of many people with varying expertise, as well as many kinds of systems, workflows, and tools.
- **Collaboration is essential and is impacted by both power relationships and cultural norms.** Emerging needs for collaboration must further impact the organizational positioning for work on archival discovery and delivery..
- **Strategic planning for archival programs is essential**, and care-focused and generative methods such as those used should be applied within organizations
- **Sharing and collaborating on early stage work** is valuable for archives and technology workers.

Recommendations

1. Develop new communities of practice to support archival discovery and delivery that work in alignment with existing ones to ensure they are sustainable.
2. Prioritize collaborative opportunities to inform strategic planning for archival discovery and delivery that explore new working relationships.
3. Adopt and apply generative and care-focused facilitation methods to inform strategic planning.
4. Understand the resourcing required and value the labor necessary to undertake strategic opportunities to improve archival discovery and delivery.

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For a full list of participants and project staff, as well as all of the project's resources and publications, see the project website.

