

# 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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Society of American Archivists Research Forum – July 21, 2021

**#LTWForum / <https://lightingtheway.stanford.edu/>**



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# Problem statement

- Archives workers still find collaboration challenging when looking to improve archival discovery and delivery, both within and across institutions.
- The COVID-19 pandemic has exacerbated this challenge, given cognitive overload and lack of time for strategic thinking and planning.
- We need to identify flexible models for inclusive, exploratory collaboration to inform future opportunities.

# Background

- Work undertaken during IMLS-funded 2-year project focusing on collaborative meetings for practitioners to support archival discovery and delivery
- Current work builds on February 2020 Forum meeting and subsequent report (see Matienzo et al. 2020)
  - Important outcome: strong desire to build collaborative networks to explore new initiatives in a practitioner-directed manner

# Working Meeting overview

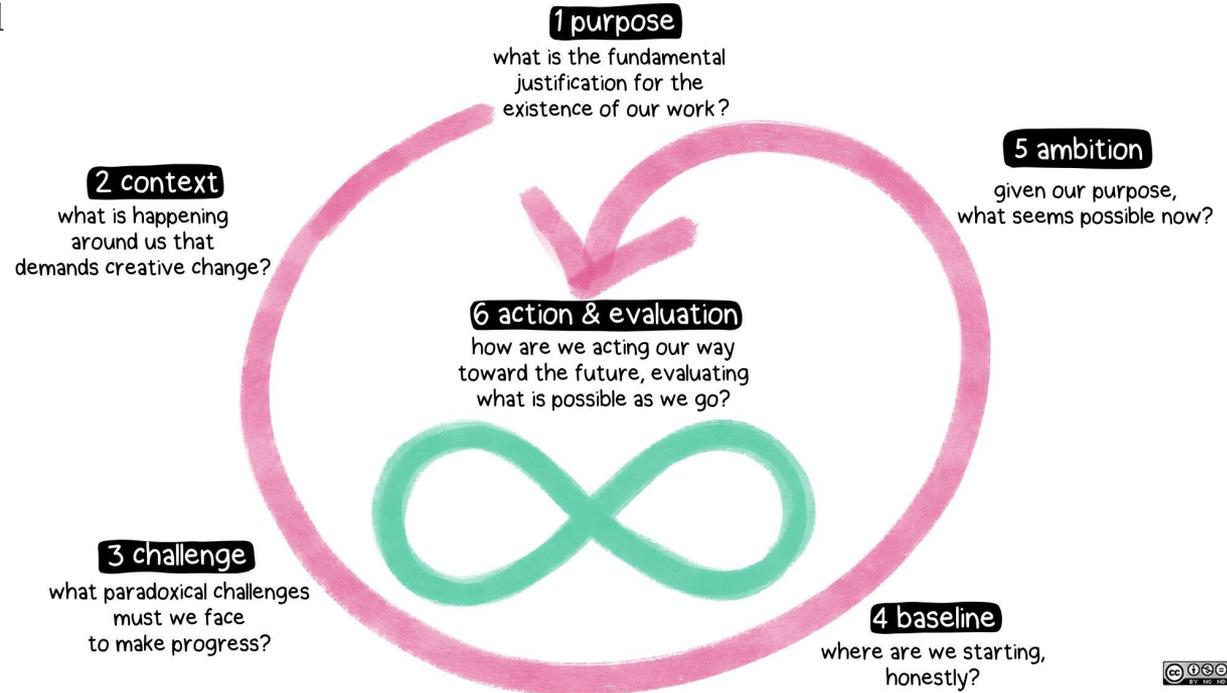
- Provide participant groups a supportive environment to explore topics related to archival discovery and delivery, culminating in a written contribution
- Application process intended for groups and individuals and included request for 250-word abstract
  - Received 24 group applications (100 individual participants)
  - Accepted 9 groups (51 participants; 2 groups merged)

# Working Meeting design

- Organized as four sessions on Zoom across six weeks (first and last plenary; others group-focused)
  - Additional collaborative tools: Google Docs, Google Jamboard
  - 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

- Iterative model developed by McCandless and Schartau (2018) based on *Liberating Structures*
- Semi-linear but flexible progression through six strategic planning questions as **collective activity**
- Activities ranged from individual activities, to topic groups and randomized groups (see Working Meeting playbook)



# 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: 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 2: Context / Challenge** (Topic Group)

- Context Map
- TRIZ
- 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
  - Getting early insights into work in progress was valuable
- Most concern was around deadlines for writing and pace of sessions

# Important insights 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

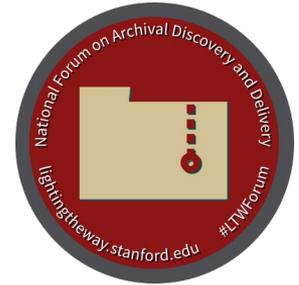
# Discussion

- Feedback suggests a strategic thinking or 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 entangling 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
- Getting a deeper understanding of how to sustain broad-based spaces for collaboration
- Opportunities to use and expand upon facilitation methods

# Thank You!



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

## **Acknowledgements**

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