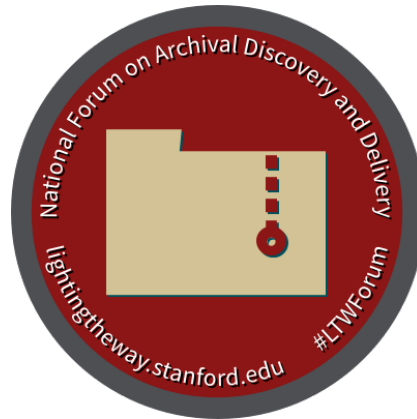


# Lighting the Way: A Preliminary Report on the National Forum on Archival Discovery and Delivery



Mark A. Matienzo  
Dinah Handel  
Josh Schneider  
Camille Villa

Stanford University Libraries  
November 2020



This project was made possible in part by the Institute of Museum and Library Services, through grant LG-35-19-0012-19. The views, findings, conclusions or recommendations expressed in this publication do not necessarily represent those of the Institute of Museum and Library Services.



This work is licensed under a [Creative Commons Attribution 4.0](https://creativecommons.org/licenses/by/4.0/) International License.

## Table of contents

<b>Executive summary</b>	3
<b>Acknowledgements</b>	4
<b>Project background</b>	5
Key concepts	5
Primary audiences and principles	6
Project activities and goals	7
<b>Forum design and structure</b>	8
The application process, response rate, and travel funding	8
Forum conceptual background and overview	9
Day 1 (February 10, 2020)	11
Day 2 (February 11, 2020)	17
Day 3 (February 12, 2020)	21
<b>Evaluation and analysis</b>	23
Retrospective and facilitator reflection	24
Participant feedback survey	27
Emerging themes	31
<b>Discussion and next steps</b>	43
Scope and focus	43
Participation and community engagement	44
Facilitation and structure of meetings and activities	45
Written contributions	45
Next steps	45
<b>Appendices</b>	47
Application form	
Community Agreements and Code of Conduct	
Lighting the Way Forum Playbook	
25/10 Crowd Sourcing Ideas	
Anonymized Who/What/When Matrix actions	
Feedback survey questions	
Quantitative feedback summary	

## Executive summary

Stanford Libraries hosted *Lighting the Way: A National Forum on Archival Discovery and Delivery*, which focused on information sharing and collaborative problem solving around improving discovery and delivery for archives and special collections. Archival discovery and delivery is how the project describes what people and systems do to support finding, accessing, and using material from archives and special collections. Systems include not just software, but also workflows, paper forms, standards, and more. The meeting had 71 participants drawn from multiple disciplines and job functions in the archives, library, and technology sectors. Participants were selected through an application process, which received over 200 submissions. Participants primarily came from US academic research libraries, but also included participants from government archives, tribal archives, software vendors, and museums. Approximately 300 remote attendees joined the livestreamed portion of the Forum.

The Forum, held over two and a half days, included a series of plenary presentations in the first half of the first day, and a series of facilitated activities held over the rest of the event. The presentations and facilitated activities were intended to highlight both successes and ongoing challenges faced by participants and their institutions in terms of archival discovery and delivery. The presentations and activities also were designed to serve the goals of the Forum, which included 1) allowing participants to see, map, and build connections – between one another, their work, the systems they rely on, and the communities they serve; 2) organizing around shared opportunities and challenges, identified by participants during group activities; and 3) providing a platform for engagement with the project.

Participants used idea generation activities focused on eliciting these opportunities and challenges, as well as potential areas for further work. Many ideas emerged about potential projects and initiatives for both participants and the projects to carry forward, but the most consistent themes centered around the ongoing need for a community focused on archival discovery and delivery. Additional areas of interest included removing barriers and addressing cultural issues with archives and special collections, developing a national “virtual reading room” for controlled online access to digital materials, developing a community of practice around user studies in archives, incorporating decolonial and anti-racist practices, and contributing to shared technical infrastructure. Participants were provided opportunities to give structured feedback through both daily retrospectives during the Forum and a feedback survey distributed after the event’s conclusion. While participants were overall satisfied with the Forum and saw it as a space for productive conversations to emerge, there were also several areas identified for improvement. Participants appreciated the breadth of the Forum’s focus, although this led to some confusion around the scope and focus for the Forum and the overall project.

Following the event, the project team synthesized the activities, outputs, and feedback from the Forum into this written report shared with the participants and the broader archives community. The project is recentering its efforts and will host an online working meeting and asynchronous activities in Spring 2021 focused on collaborative writing and in-depth exploration of topics and themes raised in the Forum.

## Acknowledgements

The project team would like to acknowledge the Institute of Museum and Library Services, whose support made this project possible, including Senior Library Program Officer Ashley Sands, who has provided essential guidance throughout the project. We also thank Stanford University Libraries leadership, namely Michael A. Keller, Tom Cramer, and Roberto Trujillo, for their administrative backing for the project. In addition, the project team wishes to acknowledge Franz Kunst and Sally DeBauche for their contributions to the project's foundational research which informed the Forum's design, and Supavadee Kiattinant, who supported the Forum's administrative and logistical needs.

We have been lucky to receive tremendous support from our participant-advisors: Amelia Abreu, Hillel Arnold, Elvia Arroyo-Ramírez, Dorothy Berry, Max Eckard, Amanda Ferrara, Geoff Froh, Julie Hardesty, Linda Hocking, Sara Logue, Sandra Phoenix, Gregory Wiedeman, and Audra Eagle Yun. We would like to acknowledge Hillel for his assistance in planning and designing the Forum and its activities, and Max and Dorothy for their assistance in reviewing forum applications. Finally, we wish to thank the individuals listed below who participated in the Forum and provided feedback on earlier versions of this report. The success of the Forum, and the project's future activities, would not have been possible without their active participation.

### List of participants and facilitators<sup>1</sup>

Amelia Abreu, UX Night School <sup>†</sup>	Shane Huddleston, OCLC
Valerie Addonizio, Atlas Systems	Noah Huffman, Duke University
Sean Aery, Duke University	Carrie Hintz, Emory University
Carla O. Alvarez, University of Texas Libraries	Nancy Kennedy, Smithsonian Institution
Krystal Appiah, University of Virginia	Emily Lapworth, University of Nevada, Las Vegas
Hillel Arnold, Rockefeller Archive Center <sup>*†‡</sup>	Charlie Macquarie, University of California, San Francisco
Elvia Arroyo-Ramírez, UC Irvine <sup>*†</sup>	Jenny Manasco, American Baptist Historical Society
Anne Bahde, Oregon State University	Mark A. Matienzo, Stanford University Libraries <sup>*</sup>
Erin Baucom, The University of Montana - Missoula	Anna McCormick, New York University
Stephanie Becker, Case Western Reserve University	Giordana Mecagni, Northeastern University Archives & Special Collections
Dorothy Berry, Houghton Library, Harvard University <sup>*†‡</sup>	Daisy Muralles, formerly UCSB Library (now CSU East Bay)
Elena Colón-Marrero, Computer History Museum	Lori Myers-Steele, Berea College
Rose Chiango, Philadelphia Museum of Art	Lisa Nguyen, Hoover Institution Library & Archives, Stanford University
Greg Cram, The New York Public Library	Donovan Pete, Indigenous Digital Archives
Katherine Crowe, Nat'l. Anthropological Archives, Smithsonian Institution	Christie Peterson, Smith College Special Collections <sup>*†</sup>
Michelle Dalmau, Indiana University <sup>*</sup>	Kim Pham, University of Denver
Kira Dietz, Virginia Tech	Sandra Phoenix, HBCU Library Alliance <sup>†</sup>
Sally DeBauche, Stanford University Libraries	Chris Powell, University of Michigan Library
Kate Donovan, Harvard Library	Genevieve Preston, San Bernardino County Historical Archives
Sarah Dorpinghaus, University of Kentucky Libraries	Merrilee Proffitt, OCLC
Max Eckard, University of Michigan Bentley Historical Library <sup>*†</sup>	Caitlin Rizzo, Pennsylvania State University
Glynn Edwards, Stanford University Libraries	T-Kay Sangwand, UCLA
Danielle Emerling, West Virginia University	Josh Schneider, Stanford University <sup>*</sup>
Amanda Ferrara, Princeton University <sup>†‡</sup>	Bethany Scott, University of Houston Libraries
Tanis Franco, University of Toronto Scarborough	Sarah Seestone, Stanford University <sup>*†</sup>
Geoff Froh, Densho <sup>†</sup>	Heather Smedberg, UC San Diego Library
Katie Gillespie, Atlas Systems	Trevor R Thornton, NC State University Libraries
Kevin Glick, Yale University Library, Manuscripts & Archives	Althea Topek, formerly Tulane University (now Smith College)
Sara Angela Guzman, Tohono O'odham Cultural Center & Museum	Anna Trammell, Pacific Lutheran University
Wendy Hagenmaier, Georgia Tech	Adrian Turner, California Digital Library
Dinah Handel, Stanford University Libraries <sup>*</sup>	Amanda Whitmire, Stanford University Libraries
DeLisa Minor Harris, Fisk University	Amy Wickner, University of Maryland
Aaisha Haykal, College of Charleston	Audra Eagle Yun, UC Irvine <sup>*†</sup>
Michelle Herman, Archives of American Art, Smithsonian Institution	Camille Villa, Stanford University Libraries <sup>*</sup>
Linda Hocking, Litchfield Historical Society <sup>†‡</sup>	Jennifer Vine, Stanford University Libraries
	Greg Wiedeman, University at Albany, SUNY <sup>*†</sup>

---

<sup>1</sup> \* facilitator; <sup>†</sup> notetaker; <sup>‡</sup> project participant-advisor

## Project background

Lighting the Way, facilitated by Stanford University Libraries and funded by the Institute of Museum and Library Services, is focused on convening a series of meetings focused on improving discovery and delivery for archives and special collections. Through its activities, meetings, and deliverables, the project is intended to engage stakeholders and experts including archives, library, and technology workers. The meetings are intended to build consensus around strategic and technical directions to improve user experience, access, and interoperability across user-facing discovery and delivery systems for archives, and to provide a model for values-driven technology work within cultural heritage.

While archivists, librarians, and technologists have begun to explore and understand how effective systems integration impacts their work, most integration efforts have tended to focus on the integration of staff-facing systems like collection management systems, repositories, and digital preservation infrastructure. Based on Stanford Libraries' work on the ArcLight archival discovery platform,<sup>2</sup> and informed by work across the library, archives, and technology sectors, we believe there is an opportunity to get a broader and more in-depth understanding of how networks of people and technology impact archival discovery and delivery, and to develop a forward-looking agenda describing an ethical, equitable, sustainable, and well-integrated future for archives and special collections.

### Key concepts

**Archival discovery and delivery** is how we describe what *people and systems do to support finding, accessing, and using material from archives and special collections*. Systems include software, workflows, paper forms, standards, and more. We also often refer to software that specifically serves these functions as “front-end systems,” which include those supporting search and presentation of archival description, delivery and presentation of digital objects, request management systems, and interpretation and crowdsourcing. Part of the broader challenge is to determine how to effectively integrate all those systems to work together as a coordinated whole, which serves as the fundamental area of focus for Lighting the Way.

**Integration** is the use of processes or tools to join these 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 can also impact archives, library, and technology workers responsible for those functions and systems. Integration also requires close collaboration across job roles and responsibilities, departments, and institutions, and thus fundamentally relies on people as well.

---

<sup>2</sup> “ArcLight,” *Stanford University Libraries*, accessed May 3, 2020, <https://library.stanford.edu/projects/arclight>.

## Primary audiences and principles

Participants in the project represent the primary audiences and stakeholders for the project across multiple disciplines and job functions both within and outside the context of archives and libraries, in three complementary and inter-reliant groups:

- **Archives, special collections, and other library workers**, across job functions (e.g. technical services, public services and reference, metadata management, digital collections, and administration), position classification (e.g. support staff, credentialed professional), and type of institution (e.g. academic, public libraries, museums, historical societies, government archives, tribal archives).
- **Technology workers**, across job functions (e.g. software developers, user experience designers, product managers, systems architects, etc.), position classification, and type of institution (e.g. archives- or library affiliated, vendors, service providers, consortia, open source software communities).
- **People with interest or expertise in terms of legal and ethical issues in archives/special collections**, across areas of focus (e.g. intellectual property, inclusive description, cultural sensitivity, risk management, and open access).

This audience definition helps ensure that the project and its meetings remained focused on the needs and experience of practitioners across these categories. In addition, our project remains focused on providing opportunities for deeper collaboration and conversation between archives workers and technology workers. We recognize that archival discovery and delivery is supported by a wide range of responsibility and kinds of expertise, across institutional contexts, levels of resourcing, and the types of communities we serve. We also recognize that people may be discouraged or excluded from these conversations both within their institution or in larger community settings based on their identity or systemic issues. To this end, we have established a core set of principles for the project:

- 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 recommendations across contexts, communities, levels of resourcing.
- We develop recommendations consciously as an inclusive expression of professional ethics and values.

To be truly transformational, our work must be conducted in a space that acknowledges the power dynamics of bringing together workers across professional contexts, roles, and job classifications, acknowledging institutional privilege, and the lack of representation of marginalized people within the archives, library, and technology sectors. The Lighting the Way project is committed to providing a

productive, inclusive, and welcoming environment for discussion and collaboration about archival discovery and delivery. All participants are expected to follow our Community Agreements and Code of Conduct, including project staff, advisors, event participants, and other contributors. This document has been included as an appendix to this report.

## Project activities and goals

The project has two major categories of activities: meetings, and research and communications:

- **Meetings** include the Forum (the topic of this report) and the working meeting (a smaller planned meeting of 25 people, focused on collaborative writing).
- **Research and communications** include foundational research (undertaken before the Forum to provide background), the integration handbook (containing short case studies about current or planned archival discovery and delivery efforts, position papers, and other written contributions from project participants), a statement of principles (generated in the working meeting), a white paper (summarizing the overall project), and peer-reviewed articles and presentations.

These activities support the following project goals:

- **Map the ecosystem supporting archival discovery and delivery.** This will allow us to better understand the purpose of systems, software, and standards, why they need to work together, how people work together to implement them, how better integration of these systems might be achieved, and challenges for this work. This activity is supported by the foundational research before the Forum, as well as the Forum and working meeting.
- **Develop both conceptual and actionable recommendations for technical, ethical, and practical concerns related to archival discovery and delivery and integration.** This is intended to provide high-level guidance, informed by comparable statements of principles, such as the revised DACS principles<sup>3</sup> and the DLF Born Digital Access Working Group's *Levels of Access*<sup>4</sup> and *Access Values* documents.<sup>5</sup> This will be supported by the integration handbook, the white paper, the statement of principles, and the Forum and working meeting.
- **Build a shared understanding between archives and technology workers undertaking this work.** This is intended to allow for effective collaboration between these groups. This is

---

<sup>3</sup> "Statement of Principles." *Describing Archives: A Content Standard*, Version 2019.0.3. Society of American Archivists, 2019. [https://saa-ts-dacs.github.io/dacs/04\\_statement\\_of\\_principles.html](https://saa-ts-dacs.github.io/dacs/04_statement_of_principles.html).

<sup>4</sup> Elvia Arroyo-Ramírez, Kelly Bolding, Danielle Butler, Alston Cobourn, Brian Dietz, Jessica Farrell, Alissa Helms, Kyle Henke, Charles Macquarie, Shira Peltzman, Camille Tyndall Watson, Ashley Taylor, Jessica Venlet, and Paige Walker, "Levels of Born-Digital Access," February, 2020, <https://doi.org/10.17605/OSF.IO/R5F78>.

<sup>5</sup> Digital Library Federation Born-Digital Access Working Group. "Access Values," Version 1, <https://doi.org/10.17605/OSF.IO/ED7VK>.

primarily supported by the Forum and working meetings, and secondarily by research and communications.

- **Activate a diverse group of project participants to adopt the recommendations and findings developed during the project across institutional contexts, capacities, and software platforms.** This is intended to encourage a broad community to engage with the project and provide us feedback on the recommendations of the project. This is primarily supported by the Forum and working meetings, and secondarily, by research and communications.

## Forum design and structure

Lighting the Way: A National Forum on Archival Discovery and Delivery (“the Forum”) was designed to support information sharing and collaborative problem solving around archival discovery and delivery. The goals for the Forum were:

- **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**, identified by participants during group activities.
- **To provide a platform for engagement with the project**, leading to participation in other project activities (e.g. attending the working meeting or contributing to written products like the integration handbook).

## The application process, response rate, and travel funding

As the first of the two project meetings, the Forum served as the beginning point of engagement for most participants in the project. While participant advisors and other project supporters were identified early in the project lifecycle, the Forum was intended as an essential form of outreach. Realizing there was likely wide interest in the project, the project team prepared a call for participation and application process, as informed by previous IMLS National Forum Grant projects, such as *Always Already Computational: Collections as Data*<sup>6</sup> and the *National Web Privacy Forum*<sup>7</sup>. The project team created an application using the Qualtrics survey platform, intended to gather information about prospective participants, their responsibilities, their work related to archival discovery and delivery, and successes and challenges therein.

---

<sup>6</sup> Thomas Padilla, Laurie Allen, Hannah Frost, Sarah Potvin, Elizabeth Russey Roke, and Stewart Varner. “Always Already Computational: Collections as Data. Final Report.” May 22, 2019. <https://doi.org/10.5281/zenodo.3152935>

<sup>7</sup> Scott W.H. Young, Sara Mannheimer, Jason A. Clark, and Lisa Janicke Hinchliffe, “A Roadmap for Achieving Privacy in the Age of Analytics: A White Paper from A National Forum on Web Privacy and Web Analytics.” Montana State University Library. May 1, 2019. <http://doi.org/10.15788/20190416.15445>.



Given the project's focus on equity and inclusion, the application asked prospective participants whether they receive travel support from their employer, whether they would need travel support to participate in the Forum, whether they identified as a member of any underrepresented or marginalized populations, and whether their work directly or indirectly supports underrepresented or marginalized populations. Applicants were not asked to self-disclose any further additional information about marginalized aspects of their identity.

Applications were evaluated by the Project Director and two of the project's participant advisors against a rubric of up to 25 points:

- Level of engagement with the project (up to 4 points), used to identify participant advisors, authors of letters of support, invited guests, or referrals from the project team or participant advisors;
- Match with defined project audience (up to 4 points), used to ensure that the event remained practitioner-focused;
- Whether the applicant was a member of an underrepresented or marginalized population (up to 2 points);
- Whether the applicant's work directly or indirectly underrepresented or marginalized population (up to 2 points);
- Whether the applicant could attend regardless of their access to funding (up to 4 points);
- The depth of their answers about their work in relation to archival discovery and delivery and successes and challenges therein (up to 4 points);
- Whether the applicant was willing to present or write about the work they described (up to 2 points);
- and whether the applicant provided any actionable feedback or referrals (up to 3 points).

Applications were open between November 13-December 15, 2019, with a total of 422 applications received (both complete and incomplete), and 203 complete applications that were evaluated by the reviewers. While the Forum was originally envisioned as a 2.5-day meeting of up to 50 participants, with 30 fully funded participants, the high response rate led the project team to expand the Forum to a total of 71 participants, including facilitators.

42 participants (59.15%) received travel funding of some form, including lodging costs paid directly by Stanford and reimbursements for actual or per diem travel costs, with an average of \$1,130.65 offered per funded participant, and an average of \$1,055.80 in paid participant support costs per funded participant (either directly charged to Stanford or reimbursed).

## Forum conceptual background and overview

The Forum used a mix of plenary presentations and facilitated breakout activities to achieve the Forum goals. The Forum was notably influenced by the work of the Montana State University Library's *National*

*Web Privacy Forum*,<sup>8</sup> which used collaborative design exercises to allow participants to help actively shape their project’s agenda. During both project conception and planning, the Lighting the Way project team wanted to leverage proven exercises and techniques drawn from existing methodologies used in ideation sessions for human-centered design,<sup>9</sup> as we believed that this could serve as a useful resource to others interested in facilitating such a meeting. Ideation sessions rely heavily on the use of *lateral thinking*, a concept developed by Edward de Bono, which allows for indirect and creative approaches to problem solving to arise through disrupting constraining thought patterns.<sup>10</sup> Ideation sessions also often have a natural “flow” to them, following a process that guides participants through three modes of thinking: divergent thinking (generating a large number of ideas), emergent thinking (building from and upon past ideas), and convergent thinking (sorting, clustering, and evaluating ideas).<sup>11</sup>

Collaborative activities were drawn from two primary sources: *Liberating Structures*,<sup>12</sup> a framework of facilitation techniques that allow for distributed control developed by Keith McCandless and Henri Lipmanowicz, and Gray, Brown, and Macanuf’s *Gamestorming*,<sup>13</sup> which leverages the “divergent/emergent/convergent” model. Both frameworks were chosen because of their use of engaging activities that could center the expertise of the Forum participants and maximize participation by using a variety of communication methods and modes. The activities also allowed the project team and facilitators to structure activities around groups of varying sizes, allowing for time for individual reflection, small group discussion, and larger interactions between groups and across the entire Forum.

The Forum was held across 2.5 days, from February 10-12, 2020 at the Bechtel Conference Center, Encina Hall, on the Stanford University campus. Day 1 focused on context-setting presentations and divergent activities intended to set the stage and develop Forum themes. Presentations held in the first half of Day 1 were also livestreamed using a Zoom webinar and YouTube Live, and were recorded. Day 2 focused on emergent activities, intended to support participants in examining, exploring, and experimenting in the problem space. Day 3 focused on convergent activities intended to move participants towards conclusions, decisions, and both individual and collective action.

---

<sup>8</sup> *ibid.*

<sup>9</sup> See, for example, LUMA Institute, *Innovating for People: Handbook of Human-Centered Design Methods* (Pittsburgh: LUMA Institute, 2012).

<sup>10</sup> Rikke Friis Dam and Yu Siang Teo, “Understand the Elements and Thinking Modes That Create Fruitful Ideation Sessions.” *The Interaction Design Foundation*. February 11, 2018.

<https://www.interaction-design.org/literature/article/understand-the-elements-and-thinking-modes-that-create-fruitful-ideation-sessions>.

<sup>11</sup> *ibid.*

<sup>12</sup> Henri Lipmanowicz and Keith McCandless, “Liberating Structures - Introduction,” *Liberating Structures*, accessed May 3, 2020. <http://www.liberatingstructures.com/>.

<sup>13</sup> Dave Gray, Sunni Brown, and James Macanuf, *Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers*. Sebastopol, CA: O’Reilly, 2010.

Participants were seated at 10 round tables facing a stage on one side. For much of the three days, participants could sit where they pleased, but were encouraged to sit with people they did not know. While some of the Forum activities took place at the level of these tables or groups, many of the exercises took place across affinity groups, and several included physical movement or interaction with physical artifacts. In the second half of Day 2, tables were aligned with participant affinity groups based roughly on job function, including “Technical Services,” “Heads/Managers/ Leadership,” “Digital Collections,” “Developers/UX/IT/ Product Managers,” and “Public Services.”

Participants were provided with Participant Packets in advance of the meeting, which included a Local Map, Forum Schedule, Community Agreements and Code of Conduct, Project Overview, Participant Preparation Guide, Reimbursement Instructions, and List of Participants.

A total of 15 facilitators and notetakers were selected from the project team, participant advisors, and a select number of Forum participants who had self-identified as being willing to volunteer for these roles. Facilitators helped to keep the conversation going, determined how to help people stay engaged, helped answer questions about specific activities, watched for and responded to difficult social dynamics, and made sure that everyone participated and was heard. Facilitators included four primary facilitators, that organized the days and led specific activities, as well as one or more table facilitators that were assigned to a specific table. Notetakers were asked to help document the Forum and its activities, and to assist facilitators in making space for relationship-building among the participants. Facilitators and notetakers received access to a Forum “playbook,” which included detailed logistical information about the event and schedule, each activity, supplies needed, and a basic script to follow for the day. A lightly redacted version of the playbook is included as an appendix to this report.

## Day 1 (February 10, 2020)

### Overview

The first day focused on activities which introduced participants to each other, and enabled and encouraged divergent thinking. In the “divergent/emergent/convergent” model, the first day set the stage for subsequent discussions.

The more ideas you can get out in the open, the more you will have to work with in the next stage. The opening is not the time for critical thinking or skepticism; it’s the time for blue-sky thinking, brainstorming, energy, and optimism. The keyword for opening is “divergent”: you want the widest possible spread of perspectives; you want to populate your world with as many and as diverse a set of ideas as you can.<sup>14</sup>

---

<sup>14</sup> Gray, Brown, and Macanuso, “What is a Game?” *Gamestorming*, 11.

During breakfast, participants were encouraged to introduce themselves to everyone at their table, with sample icebreaker or introductory questions provided by the facilitators.


### Trading Cards

To begin the first day, participants were asked to create a trading card for themselves to share with others at their table. The Trading Cards activity<sup>15</sup> was intended to serve as an icebreaker, introducing participants to their tablemates and generating discussion, while avoiding the large-scale, often depersonalizing, and time-consuming whole-room introductions that might otherwise serve this purpose. A participant's trading card consisted of a drawing or representation of themselves, along with a few words that described the kind of work they did, and why they were excited about the Forum. At each table, these cards were passed around, and tablemates wrote questions on the backs of the cards. Then, the table passed each trading card back to its creator, and each person took a turn answering a question on their card.

Draw a “trading card” of yourself...

- Write your name at the top
- Draw a picture that represents you
- Below the picture:
  - Write a few words that describe the work you do
  - Write something you're excited about in terms of the Forum

L.T. Way



Public services staff  
Excited to talk about  
our request forms!

### Plenary presentations and themes

After the initial icebreaker, the Forum's public program was livestreamed via Zoom webinar and YouTube Live and recorded. Following the Forum, recordings of the presentations and slide decks were made available under a Creative Commons Attribution – NonCommercial – No Derivatives (CC BY-NC-ND) license via the Stanford Digital Repository.<sup>16</sup>

The program began with welcome announcements by the Project Director and Associate University Librarian, followed by an acknowledgement of IMLS funding support, a land acknowledgement, review of the core principles, Community Agreements and Code of Conduct, and associated logistical announcements. Introductory remarks were rounded out by a presentation from the project team, which identified team members, described project concepts, audiences, goals, activities, and related

<sup>15</sup> Dave Gray, “Trading Cards,” *Gamestorming* (blog), January 27, 2011, <https://gamestorming.com/trading-cards/>.

<sup>16</sup> Stanford University Libraries. *Lighting the Way: A National Forum on Archival Discovery and Delivery, February 10, 2020. Presentations.* <https://searchworks.stanford.edu/view/jp429tw5870>

research, and provided a high-level overview of the “divergent/emergent/convergent” model that would guide the Forum, and ending with a review of the Forum schedule.

The Project Team presentation was followed by plenary presentations, organized into four themes: The Evolving Systems Ecosystem; Networks and the Big Picture; Ethical, Legal, and Cultural Concerns; and Impacts on Public Services and Outreach. Each theme had its own question and answer session to engage the participants.

- *The Evolving Systems Ecosystem*: What software and other systems do we use to make archival discovery and delivery possible, and how is that changing within institutional contexts? Presenters included Trevor Thornton (North Carolina State University), Lori Myers-Steele (Berea College), Anna Trammell (Pacific Lutheran University), and Kim Pham (University of Denver).
- *Networks and the Big Picture*: What issues are impacting archives and libraries at the level of the sector, consortia, or beyond, related to discovery and delivery? Presenters included Adrian Turner (California Digital Library) and Merrilee Proffitt (OCLC Research).
- *Ethical, Legal, and Cultural Concerns*: How have factors like privacy, cultural protocols, copyright, and others impacted our ability to address archival discovery and delivery, on a technical, operational, or strategic level? Presenters included Amanda Whitmire (Miller Library, Hopkins Marine Station, Stanford University), Tanis Franco (University of Toronto Scarborough), T-Kay Sangwand (University of California, Los Angeles), and Greg Cram (The New York Public Library).
- *Impacts on Public Services and Outreach*: How does archival discovery and delivery fit within the front-line work of library and archives workers focused on reference, outreach, public service, and community needs? Presenters included Genevieve Preston (San Bernardino County Historical Archives), Daisy Muralles (University of California, Santa Barbara), Heather Smedberg (University of California, San Diego), and Sara Guzman (Himdag Ki - Tohono O’odham Nation Cultural Center & Museum).

The livestreamed public portion of the Forum formally concluded with remarks by the Project Director, followed by lunch.

### Mad Tea

The first activity following lunch, Mad Tea,<sup>17</sup> was intended to build energy, foster creativity, and further introduce participants to one other while articulating shared concerns around archival discovery and

---

<sup>17</sup> “Mad Tea (v1.2): Rearrange the context for taking action,” *Liberating Structures*, accessed May 3, 2020 at <http://www.liberatingstructures.com/mad-tea/>.

delivery. Participants were invited to finish a list of open-ended sentences that were projected on the screen and read aloud by the facilitator. Participants formed two concentric circles and completed the sentences with rotating partners. There were 17 questions, with 30 seconds allotted for each exchange.

Questions included:

1. What first inspired me in this work is...
2. Something we must learn to live with is...
3. An uncertainty we must creatively adapt to is...
4. What I find challenging in our current situation is...
5. Before we make our next move, we cannot neglect to...
6. Something we should stop doing (or divest) is...
7. What I hope can happen for us in this work is...
8. A big opportunity I see for us is...
9. If we do nothing, the worst thing that can happen for us is...
10. A courageous conversation we are not having is...
11. An action or practice helping us move forward is...
12. A project that gives me confidence we are transforming is...
13. Something we need to research is...
14. A bold idea I recommend is...
15. A question that is emerging for me is...
16. When all is said and done, I want to...
17. Something I plan to do is...

Participants were then asked to spend 10 minutes answering the following questions by themselves:

1. What is the deepest need for my / our work?
2. What is happening around me / us that demands creative adaptation?
3. Where am I / are we starting, honestly?
4. Given my / our purpose, what seems possible now?
5. What paradoxical challenges must I / we face down to make progress?
6. How am I / are we acting our way forward toward the future?

Participants were then asked to spend a few additional minutes reflecting on the question:

1. What are the biggest opportunities we have in terms of improving archival discovery and delivery?

Afterwards, they were invited to spend 5 minutes reflecting with one or two people at their table about their answers to this question and identifying other opportunities. After those 5 minutes had passed,

they were asked to spend 5 additional minutes sharing answers and generating additional ideas at their tables. Finally, each table had 90 seconds to share one opportunity and one challenge that stuck out in their discussion to the rest of the Forum attendees.

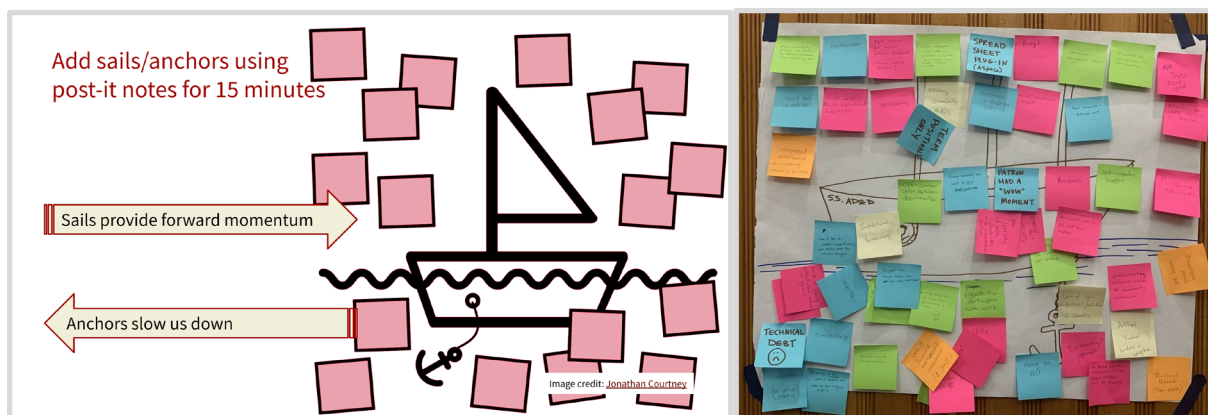
## Speedboat

The next activity designed to encourage divergent thinking was Speedboat,<sup>18</sup> which expanded on the previous exercise by identifying key drivers and hindrances in the problem space of archival discovery and delivery.

Participants were provided with Post-It easel pads and markers on which they were instructed to draw a boat, “the good ship Archival Discovery and Delivery.” Participants were then asked to spend 15 minutes on their own adding “sails” and “anchors” to that drawing: sails representing strengths or supports that provide forward momentum; and anchors representing challenges and obstacles that slow it down.

Participants then spent a further 15 minutes discussing all the sails and anchors that their table had added as a group, considering whether any of the sails or anchors seemed more significant than others, and adding additional sails or anchors identified as part of that discussion.

Tables then spent an additional 15 minutes presenting their drawings to the other participants, considering as a group the extent to which sails and anchors aligned across tables, and especially which sails and anchors seemed directly oppositional. Speedboat diagrams were photographed and affixed to the walls of the room for review by all attendees. This exercise was selected in part to inform TRIZ, an activity in Day 2, which asked attendees to consider how we might be unknowingly perpetuating these anchors and others in our day-to-day work.



<sup>18</sup> Dave Gray, “Speed Boat,” *Gamestorming* (blog), April 5, 2011, <https://gamestorming.com/speedboat/>.

## Low-Tech Social Network

The final exercise of Day 1 was the Low-Tech Social Network,<sup>19</sup> which continued to encourage divergent thinking by asking participants to consider the social networks represented in the room, as well as the individuals and other network nodes that were not represented.

Participants either reused their trading card from earlier in the day, or created a new one which included keywords describing their interests and affiliations. They were then asked to “upload” their profiles to the social network by taping their trading cards to a sheet of easel paper.

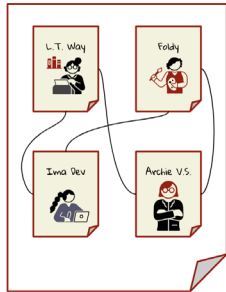
With guidance from facilitators, participants identified the contours of the network at their tables by spending 10 minutes drawing connections such as “friends with,” “works with,” “went to school with,” etc. Participants were then encouraged to further elaborate and build out these connections through discussions first with their tablemates, and later with a neighboring table.


The easel paper for each augmented network was then taped to the wall, and participants were asked to spend 15 minutes reviewing the social networks of the other tables, reflecting on who else they were connected to in the network, and considering which connections they found the most noticeable or striking. Finally, participants rejoined their tables and were invited to share anything with the room that stood out to them about the social networks uncovered through the exercise. Low-tech social networks were photographed and affixed to the walls of the room for review by all attendees.

### Build your table social network

Spend 10 minutes at your table:

- Tape your cards to a sheet of easel paper
- Starting with one person, figure out how you're connected
- Draw and label the connections between one another (e.g. “friends with”)





## Retrospective

The day concluded with a retrospective, during which participants were encouraged to provide feedback to the facilitators, to inform the design and approach of remaining Forum activities. The

<sup>19</sup> Dave Gray, “Low-Tech Social Network,” *Gamestorming* (blog), January 27, 2011, <https://gamestorming.com/low-tech-social-network/>.



specific retrospective technique chosen was the “4Ls,”<sup>20</sup> through which participants reflected and shared what they liked, learned, lacked, and longed for:

- *Liked*: What did you enjoy? What worked well?
- *Learned*: What did you discover? What new information did you get?
- *Lacked*: What was missing? What would have helped your participation go more smoothly?
- *Longed For*: What needed to exist but didn't? What would help the Forum be (more) successful?

Participants spent 5 minutes developing their own responses, and 10 minutes sharing and compiling responses at their tables. Each table then took 1 minute to share highlights of these reflections with the rest of the room. After participants were released for the day and the Forum space was cleaned up and reset for the next day's activities, a facilitator's retrospective and discussion was held to reflect on the day's events, and consider any modifications needed for the next day.

An in-depth discussion of this feedback on Day 1 follows in the *Evolution and analysis* section below.

## Day 2 (February 11, 2020)

### Overview

The second day focused on exploring themes and ideas from the divergent phase more deeply. The authors of *Gamestorming* write “The keyword for the exploring stage is ‘emergent’: you want to create the conditions that will allow unexpected, surprising, and delightful things to emerge.”<sup>21</sup> To that end, the day's activities asked participants to reflect on context, barriers (actual and imagined), affinities, workplace agency, and bigger and bolder ideas.

Before the first activity, facilitators began with introductory remarks that acknowledged two factors that arose through national news: the request for funding from the Trump Administration for the orderly closure of IMLS and the agency's response,<sup>22</sup> and controlled blasting at the Organ Pipe Cactus National Monument which desecrated burial sites and ancestral homelands of the Tohono O'odham Nation during construction of the border wall between the United States and Mexico.<sup>23</sup> Facilitators also presented a recap of Day 1, the plan for Day 2, and reminders of the Forum goals and what Forum design expected of participants. The day ended with a substantive participant retrospective, which influenced the Day 3 agenda.

---

<sup>20</sup> Mary Gorman and Ellen Gottesdiener. “The 4L's: A Retrospective Technique.” *EBG Consulting* (blog), June 24, 2010. <https://www.ebgconsulting.com/blog/the-4ls-a-retrospective-technique/>.

<sup>21</sup> Gray, Brown, and Macanujo, 11.

<sup>22</sup> Institute of Museum and Library Services, “IMLS Statement on the President's FY 2021 Budget Proposal,” February 10, 2020. <https://www.imls.gov/news/imls-statement-presidents-fy-2021-budget-proposal>.

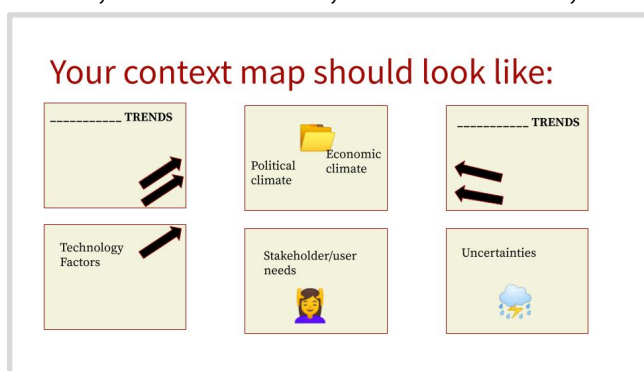
<sup>23</sup> BBC, “Native burial sites blown up for US border wall,” February 10, 2020. <https://www.bbc.com/news/world-us-canada-51449739>.

## Trading Cards

To begin the second day, participants were encouraged to sit at different tables than the day prior, and to remake a trading card for themselves. Otherwise, the activity followed the same structure as the first day. The activity was repeated to allow participants to reintroduce themselves to one another, and to build on connections created in the first day of the Forum.

## Context Map

Following the trading card warm-up exercise, participants at each table were guided through a Context Map exercise.<sup>24</sup> Context mapping is intended to allow participants to build a systemic view of archival discovery and delivery, identifying factors and trends that impact it like changes in technology as well as political and economic climates. First, the participants drew a context map, composed of six sections: two sections for trends (the type of trend to be determined by the map-makers), political climate, economic climate, stakeholder needs, and uncertainties.



Each table spent 60 minutes filling in the map, discussing as a group the two types of trends they wanted to highlight, and filling out each portion of the map. Maps were taped onto the wall so participants could view on their own and compare their maps with those from other tables.

## TRIZ

Following a short break, a facilitator led the participants in an exercise called TRIZ,<sup>25</sup> which is designed to identify counterproductive behaviors and unpack how they might be unknowingly perpetuated. Participants were asked to recall the “anchors” (things that may hold us back or weigh us down, barriers) identified during the Speedboat exercise on Day 1. Upon recalling the anchors, participants were then asked to imagine ways in which they could maximize these anchors, listing out undesirable and unwanted outcomes with regards to archival discovery and access. Example maximized undesirable and unwanted outcomes included:

<sup>24</sup> Dave Gray, “Context Map”, *Gamestorming* (blog), October 27, 2010. <https://gamestorming.com/context-map-2/>.

<sup>25</sup> Henri Lipmanowicz and Keith McCandless, “Making Space with TRIZ,” *Liberating Structures*, accessed May 3, 2020. <http://www.liberatingstructures.com/6-making-space-with-triz/>.

- Negative economic and labor outcomes (making all funding temporary and competitive based on funder priorities; transitioning to gig employment; corporate sponsorship)
- Undermining user privacy (e.g. collecting biometric and medical data and selling it) and collaborating with law enforcement and intelligence;
- Design without user input;
- Accepting new collections without regard for the availability of resources necessary to preserve, describe or provide access to them.;
- Ending fair use, copyright exceptions, and limitations;
- Having a lack of bravery to make changes;
- Intensifying a focus on quantifiable measures of success only; and
- Continuing to pursue a technology because it took a lot to implement (sunk costs).

After each table finished producing a list of unwanted outcomes, they were asked to consider actions or behaviors which enable those unwanted outcomes and assess ways in which these imagined behaviors might resemble actual behaviors. Discussion was held at the table level, and final lists of unwanted outcomes were shared with the room. Although this exercise provoked a great deal of laughter, it also emphasized how close some of the maximized imagined anchors were to real ones.

### Affinity Map

After lunch, participants were asked to change tables and sit with their “affinity” group for the next exercise. Affinity groups were based loosely on the job titles that participants provided in their applications and were intended to be roughly the same size (double the size of existing table-based groups). The Affinity Map exercise<sup>26</sup> was an opportunity to identify and reflect on patterns and themes based on institutional roles. Participants were asked to brainstorm answers to two questions:

- **What changes must take place to improve and enhance archival delivery and discovery?**
- **What are steps we can take to improve archival delivery and discovery?**

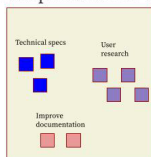
Each person spent 15 minutes brainstorming between 10-15 solutions or ideas on their own. Then, as a group, participants attempted to place similar ideas together into a cluster, without naming or quantifying the cluster. Once clustering of ideas was complete, the group then labeled each cluster.

---

<sup>26</sup> Dave Gray, “Affinity Map,” *Gamestorming* (blog), October 15, 2010. <https://gamestorming.com/affinity-map/>.

## Categorizing your ideas

- Next, work together to create labels or categories of action that your clusters fall under
  - Try not to belabor your labels
  - Feel free to have multiple labels for a cluster of post-its



At the end of the exercise, the groups shared among themselves what might have been surprising or unexpected about their solutions and groupings.

### 15% Solutions and 25/10 Crowd Sourcing

The final activity of the day combined two distinct techniques drawn from *Liberating Structures*, 15% Solutions<sup>27</sup> and 25/10 Crowd Sourcing.<sup>28</sup> Each of the two activities were intended to build on past activities by having them consider both small steps they could take individually, and big ideas that they wanted to pursue.

The activity started with 15% Solutions, which focused on revealing actions that all participants could take to move archival discovery and delivery forward and encouraged participants to think positively. Participants were asked to reflect on where they individually had discretion and freedom to act, and what they could do without more resources or authority. Participants were given pens and notecards and were asked to generate lists of these “15% solutions” over the course of five minutes. After that, participants met in groups of three or four people to discuss their lists of solutions. Each participant was allowed 5 minutes to be the center of discussion, and during that time, the other group members were asked not to provide advice or critique and instead ask clarifying questions and offer encouragement.

Following 15% Solutions, the activity transitioned into 25/10 Crowd Sourcing, which asked participants to think ten times bolder to generate and identify “big ideas” to improve archival discovery and delivery, and then to “peer review” these ideas. First, participants were asked to think of one big idea and a first step to set it in motion, and to write it on an index card without their name. Then, everyone in the room walked around, repeatedly exchanging index cards with other participants for 30 seconds. Then, when a bell sounded, everyone read the card they had in hand and rated the strength and promise of the idea on a scale of 1 to 5, with 5 being the best. This process of “milling and passing” and then rating ideas

<sup>27</sup> Henri Lipmanowicz and Keith McCandless, “15% Solutions,” *Liberating Structures*, accessed May 3, 2020. <http://www.liberatingstructures.com/7-15-solutions/>.

<sup>28</sup> Henri Lipmanowicz and Keith McCandless, “25/10 Crowd Sourcing,” *Liberating Structures*, accessed May 3, 2020. <http://www.liberatingstructures.com/12-2510-crowd-sourcing/>.

was repeated 5 times. After the fifth rating, the primary facilitator asked the room to tally the total score on the cards, with the highest possible score being 25. Then, the primary facilitator asked the room to share any ideas that had a rating of 25, 24, 23, and 22. These ideas were recorded as possible next steps for Forum participants to explore upon returning home from the Forum, and served to inform the activities on Day 3.

### Retrospective

As in day 1, the facilitators led a retrospective using the “4Ls” technique, allowing for participants to provide feedback to inform potential changes in Forum design, followed by a separate facilitator-only discussion. An in-depth discussion of this feedback on Day 2 follows in the *Evolution and analysis* section below.

## Day 3 (February 12, 2020)

### Overview

The third day aimed to move participants from idea generation to planning for individual and collective action:

In the final act you want to move toward conclusions—toward decisions, actions, and next steps. This is the time to assess ideas, to look at them with a critical or realistic eye. You can’t do everything or pursue every opportunity. Which of them are the most promising? Where do you want to invest your time and energy? The keyword for the closing act is “convergent”: you want to narrow the field in order to select the most promising things for whatever comes next.<sup>29</sup>

Following logistical updates, facilitators recapped Day 2’s focus on emergent thinking and reviewed the outcomes of the facilitator discussion. This included a review of how people were assigned to affinity groups, an acknowledgement that some of the previous day’s exercises were less successful than others. The project team also publicly acknowledged problematic group dynamics which resulted in experiences of marginalization reported by participants.

### Social Network Webbing

The day’s first activity, Social Network Webbing,<sup>30</sup> was designed to articulate connections between individuals and roles at the Forum, and to identify individuals and roles whose voices might be missing. First, attendees at each table were asked to spend 5 minutes adding their names to a Post-It note

---

<sup>29</sup> Gray, Brown, and Macanufo, 11.

<sup>30</sup> Henri Lipmanowicz and Keith McCandless, “Social Network Webbing,” *Liberating Structures*, accessed May 3, 2020. <http://www.liberatingstructures.com/23-social-network-webbing/>.

correlated with the affinity groups identified earlier, and affix those to a large easel pad. Then attendees were asked to spend 10 minutes adding Post-It notes for others engaged in this work but not present at the Forum, again using the associated color, and arrange the Post-Its based on each person's degrees of separation.

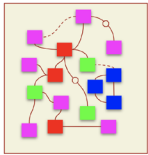
Attendees were then asked to spend an additional 10 minutes identifying who else they would like to include in these discussions, by writing their names (or roles) on Post-it with the associated color, and continuing to think about the actual and desired spread of participation. Tables were then asked to spend 15 minutes reflecting on their social network web, considering the questions:

- **Who knows whom?**
- **Who has influence and expertise?**
- **Who can block progress?**
- **Who can boost progress?**

After that reflection, attendees at each table were asked to spend 10 minutes to further discuss strategies to 1) invite, attract, and weave new people into this work; 2) work around blockages; and 3) boost progress. Finally, tables spent 10 minutes reporting out on their discussions. Social network webs were photographed and affixed to the walls of the room for review by all attendees.

### Reflect together

- Who knows whom?
- Who has influence and expertise?
- Who can block progress?
- Who can boost progress?



Draw these relationships with connecting lines



### Who/What/When Matrix

The final activity, Who/What/When Matrix,<sup>31</sup> was designed to identify specific next steps and individuals responsible for moving them forward.

Each table was asked to draw three columns on a large sheet of paper, labeled Who (the person or people taking the action), What (the action to be taken), and When (the date at which the action would

<sup>31</sup> Dave Gray, "Who/What/When Matrix," *Gamestorming* (blog), March 30, 2011. <https://gamestorming.com/whowhatwhen-matrix/>.

be done). All participants were asked to spend 10 minutes to add at least one action, which they were personally committing to take on in the next year. Although the original plan was to ask attendees to determine an action on their own, the Forum decided as a group to focus on individual actions that would directly support the “top 10 ideas” generated from the 25/10 Crowdsourcing exercise generated on Day 2.

Participants then spent an additional 10 minutes in groups of two to three people to discuss the proposed actions. Each participant was given a chance to speak and receive feedback. Who/What/When Matrices were affixed to the walls of the room for review by the table and by all attendees. Matrices were also photographed and transcribed by meeting facilitators and participant advisors. An anonymized list of all actions from this activity is included as an appendix to this report.

### Add actions to the list

Spend 10 minutes adding actions to the sheet:

- Start with the **who** (that's you!)
- Identify **what** you're going to do, drawn from the list of top 10-ish ideas from 25/10 crowdsourcing
- Identify **when** you're going to follow up

Who	What	When
Archie VS	Write a blog post about the Forum	Before March
Ivna Rev	Meet with my UP & developer peers	Two weeks
L.T. Woy	Write up a case study about how we use AI for justification requests	Before September

## Retrospective

As during the first two days, the third day concluded with a retrospective, using the “4Ls,” retrospective technique, through which participants reflected and shared what they liked, learned, lacked, and longed for.

## Forum Conclusion

The Forum ended after a discussion session that reviewed next steps, opportunities for participation, and additional time for questions and answers. Participants were invited to continue discussions informally in person over a provided lunch. Participant advisors and facilitators compiled and transcribed artifacts from the first three days.

## Evaluation and analysis

This section of the report on the Forum is intended to evaluate its design and outcomes, through looking at feedback, Forum artifacts (notes, outputs from activities, etc.), and through reflection of the project team and facilitators. This information has also been used to develop the recommendations as described in the *Next steps* section that follows below.

## Retrospective and facilitator reflection

As noted in the *Forum design* section, the project team relied heavily on retrospectives to receive feedback from participants and to discuss potential changes in Forum design among facilitators during the event.

### Day 1

Day 1 activities received generally positive feedback from participants, although some noted what felt like an abrupt transition from presentations, which provided a more passive mode of interaction, to the facilitated activities that started in the afternoon. Participants also consistently noted that they longed for more time to get to know one another through introductions.

- **Trading Cards** was viewed as a positive and low-barrier introductory exercise.
- **Mad Tea** felt chaotic to some participants, and the loudness of the activity made it hard to hear instructions from the facilitators.
- **Speedboat** had minimal in-depth feedback, but facilitators noted that most participants were highly engaged.
- **Low-Tech Social Network** was also identified as fun, although participants noted that they were not clear on the purpose for the activity. This is a case where facilitators needed to be clearer about the need to draw these connections between participants.

Facilitators noted that participants seemed to enjoy the broader context for the project, and the understanding of archival discovery and delivery as being a wide but shared area of concern. While the introductory presentations from the project team were intended to reflect the “fuzzy” nature of a human-centered design process, we also heard that some participants would have benefited from more concrete goals. On Day 1, participants also noted that a better structured introductory exercise may have provided more context by allowing participants to learn more about one another. The lack of an introduction session also was consistently noted as something that participants wanted in order to feel better connected to one another.

Facilitators also recognized that participants would benefit from additional context about project outcomes and goals, and the “fuzzy” and participant-driven nature of the Forum. Likewise, they noted that participants should be encouraged to take breaks and given additional time to organize thoughts. In response to this feedback, the facilitators made a conscious decision to spend additional time at the beginning of Day 2 and at the end of Day 3 talking about project goals, outcomes, and directions, and focused on tangible next steps for participants to continue their engagement. Participants noted that they began to see synergy between activities and the focus of the Forum by the end of Day 2. Ensuring that participants have clarity on project direction is essential, especially given challenges with forward momentum on the project related to the rise of the COVID-19 pandemic.



## Day 2

Day 2 activities ranged widely in terms of success, based upon feedback provided by participants during the retrospectives.

- **Context Map** was organized as a more in-depth activity to start the day, for participants to get a broader landscape view. Explicit feedback on this activity was minimal.
- **TRIZ** seemed to be incredibly successful, as it was seen as fun, engaging, reflective, and cathartic. Participants enjoyed the creative inversion aspect of the activity, and that many of the extreme unproductive behaviors they identified resembled situations at their own institutions.
- **Affinity Map** was consistently identified as the activity that participants struggled with most. As a 90-minute activity, it was the longest of any activity block throughout the entire Forum, and had the largest group size as well. Both of these factors made it the most challenging exercise to facilitate. Participants were also unsure why they were assigned to a particular affinity group; only well after the exercise was over did the facilitators realize that the group categories were not shared with participants on the slides. This may have exacerbated situations in which some participants felt marginalized (see below). Facilitators also noted that some participants would have preferred to select or opt into the group for this exercise, rather than being placed in the predefined groups.
- **15% Solutions and 25/10 Crowd Sourcing** received significant positive feedback. While some participants found 15% Solutions empowering, others noted that it reinforced a notion that everyone should be doing more, with one participant asking for an exercise about what one could give up to work towards their 15% Solution. 25/10 Crowd Sourcing was seen as positive and democratic, and it enabled a wide variety of ideas to come to the foreground; however, one participant wanted more guidance on how to score ideas generated in the activity.

In the facilitators' retrospective for Day 2, significant concerns arose around experiences of marginalization identified by some participants, which were not disrupted by facilitators in a timely way. While this seemed to be a consistent thread throughout the day, it became most notable when reviewing the inclusion of perspectives from marginalized people in topic "clusters" generated in the Affinity Map activity. This was particularly troubling for both participants and facilitators given some of the ideas generated by 25/10 Crowd Sourcing. Some of these ideas included decolonization or pursuing anti-racist work, but in ways that did not have well-defined initial steps, as prompted by the second question in the Affinity Map and 25/10 Crowd Sourcing activities. In addition, there was recognition that the Forum also needed discussion spaces that allowed for greater nuance on such concepts that do not always have agreed upon definitions.

Facilitators took these areas of feedback seriously and made changes in the plan for Day 3 by:

- acknowledging the problematic dynamics that arose in Day 2, and remind participants about the Community Agreements and Code of Conduct;

- using active facilitation throughout the day, to make space for people to participate in ways most comfortable to them;
- allowing for optional facilitated conversations about both big and nuanced ideas over lunch for participants able to attend;
- modifying the Social Network Webbing activity to remove reference to the underspecified and miscommunicated affinity groups used for the Affinity Map activity;
- modifying the Who/What/When Matrix activity to draw from ideas generated in 25/10 Crowd Sourcing as a starting point; and
- removing a group-based idea-evaluation subactivity (Dot Voting)<sup>32</sup> from ideas generated in the Who/What/When Matrix, instead allowing for small group discussion in dyads or triads.

### Day 3

Day 3 wrapped on a high note with its two activities:

- **Social Network Webbing** was challenging for some groups. The facilitators decided to change direction on this exercise as a result of discussion on Day 2's retrospective. Initially, the roles were intended to reflect the affinity groups selected for the Affinity Map exercise, but facilitators made the decision to remove this and allow table groups to determine the roles they wanted to discuss. Participants noted that they wanted a clearer end goal for the activity, with some noting confusion about whether they should represent individuals or abstract categories of people connected to archival discovery and delivery. Other participants noted that they lacked enough time for the exercise. Overall, facilitators observed that participants got to the ultimate purpose of the exercise: to better understand power and influence.
- **Who/What/When Matrix** was viewed as positive by participants, as it provided a lightweight accountability structure for them to carry out future efforts based upon areas of interest. Some participants noted that they wanted more information about how these efforts would be manifested over time.

Overall, the mix of activities chosen for the Forum were seen as energizing and invigorating for participants, despite the fact that many were new to many of the highly interactive exercises used. Initially, some participants struggled to effectively engage with the Forum, expressing anxiety due to unfamiliar facilitation techniques and uncertainty over if and when they could leave the room without missing content. Participants also consistently noted that the pace and transitions occasionally felt abrupt and left them exhausted at the end of each day, and asked us to consider allowing more time for reflection and journaling to allow them to digest the big ideas under discussion. While facilitators encouraged participants to take care of themselves and their needs throughout the event, a participant

---

<sup>32</sup> Sarah Gibbons, "Dot Voting: A Simple Decision-Making and Prioritizing Technique in UX." *Nielsen Norman Group*, July 7, 2019. <https://www.nngroup.com/articles/dot-voting/>.

familiar with comparable facilitation techniques noted that advising participants that they would be moving and to wear comfortable clothing prior to the Forum would have been useful.

Participants in general valued the roles of facilitators and notetakers and wanted more details on the methods used in the Forum. The biggest challenge for facilitators and notetakers was that they were stretched too thin during some activities. The project team expects that this was likely influenced both by the increase in size of the event from 50 to 71 participants and the larger group size in the Affinity Map activity, and that smaller events would likely be more manageable to facilitate.

## Participant feedback survey

The project team asked participants, livestream viewers, and facilitators to provide additional feedback and reflections through a survey hosted on the Qualtrics platform and distributed via email. The survey received a total of 120 responses. 51 responses were from Forum participants or facilitators, or approximately 71.8% of the 71 Forum participants and facilitators. 69 responses were received from livestream viewers, or approximately 17.7% of the 389 confirmed livestream attendees, or approximately 12.7% of the 536 total livestream registrants. Feedback questions included an evaluation to calculate Net Promoter Score, quantitative questions on participant interest and experience, and qualitative questions including what participants liked most or least about the Forum, what they learned at the Forum, which future project-facilitated activities could be the most valuable, and an open ended feedback question.

Overall, quantitative feedback indicated a high level of overall satisfaction with the event, in terms of content, goals, and logistics, with Net Promoter Scores indicated as favorable (33.62 overall; 46.00 for Forum participants; 23.08 for livestream viewers). However, while feedback indicated positive satisfaction and sentiment, the survey results indicate that further work will be necessary for the project to properly leverage the Forum and to meet its overall goals consistently. This quantitative feedback can be seen in more detail in the *Quantitative feedback summary* appendix. While qualitative feedback submitted by participants, livestream viewers, and facilitators varied widely, the project team identified a set of consistent themes, which helps assess the effectiveness of the Forum and can inform future project activities.

## What people enjoyed the most about the Forum

Participants enjoyed meeting, interacting with, and hearing from other participants from a variety of backgrounds and in a variety of roles. Some participants noted that this included a range of institutional and organizational types, and that for some, it was an opportunity to hear a variety of opinions and viewpoints, including challenging ideas from new voices. Multiple participants felt that the Forum was a great opportunity to network and make connections with colleagues from other institutions or roles, and noted that the expertise of the attendees enhanced their experience.

The majority of the Forum participants gave positive feedback on the format, given its mix of structured activities, brainstorming, and plenary presentations, as well as the “cooperative and optimistic spirit” present at the Forum. Feedback indicated an appreciation for the Forum’s active facilitation and interactive nature, with thanks extended to the facilitators for providing a safe space to share ideas and to promote discussion as it provided an informal and inclusive venue for participants. Some attendees appreciated that the Forum provided opportunities for more participants to speak up and contribute their perspectives. A few participants even remarked that they would be bringing some of the facilitation techniques to their own institution. Webinar attendees enjoyed the presentations and noted that the pace of presentations worked well, and were appreciative of their ability to watch the presentations. Finally, some participants appreciated the range of topics and learning about issues other than technology, although this also ties to concerns about focus described in the next section.

### What people enjoyed the least about the Forum

The project team also encouraged participants to reflect on aspects of the Forum and programming that needed improvement or change. Most notably, several participants felt the Forum suffered from a lack of focus (“scope creep”). At times, discussion strayed away from discussing archival discovery and delivery and systems integration and felt unfocused. Others noted that the discussions felt overbroad, and that it was difficult to see how they would tie together. Several participants noted that they would have preferred more explicit practical discussion of technology and systems, and well-defined outcomes, with some participants qualifying their answers that the broad conversations were nonetheless useful. A few participants noted that some activities “devolved” into milling about, and that the challenges around the Affinity Map particularly amplified this feeling of a lack of focus.

Some participants suggested that a clearer description of the Forum and project goals would have been useful, while another noted that they felt concerned that they may have misinterpreted the description of the Forum in advance of the event based on the topics that were actually covered. One participant noted that a concrete deliverable for the Forum itself could have helped to maintain focus for the event. For one participant, more background on the Forum and its focus have meant additional context on the readings provided by the foundational research team. For another, this could have included better explanation of the facilitated exercises and a roadmap of the Forum’s activities. Several participants noted the lack of representation of researchers as participants in the Forum and project, and the lack of reference to specific user studies to inform the discussion.

Participants noted that the days of the Forum seemed packed and felt too long, noting that they would have appreciated more unstructured time to sit alone with their thoughts, reflect on the day’s activities, or to have smaller group discussions or intermingle with participants that were not at their table or in their affinity groups. Participants suggested that scheduling fewer activities might be helpful in the future, or to shorten the second day and extend the third day. Some participants also noted that they wanted more time to dive into specific topics or to workshop potential solutions.

While participants otherwise provided positive feedback about the Forum design itself, some participants also gave important feedback regarding the Forum's design and the project's goals of inclusivity. Some participants noted that while the Forum had participants serving tribal communities, the Forum did not seem to be designed with tribal institutions in mind, meaning that it had less relevance to the issues faced by tribal communities and institutions. Another participant raised a concern that the Forum's format allowed complex or important issues to get passed over quickly, rather than allowing them to be discussed with appropriate nuance. Finally, a few participants mentioned they would have benefited from a better understanding of the nature of the Forum and its interactive aspects, such as wearing comfortable clothing, telling participants to expect to move, or that there may be some activities that could trigger anxiety (e.g. Mad Tea).

While appreciative of the willingness of the program organizers to livestream the plenary talks to an online audience that could not attend in person, some livestream attendees wished that they could have participated more fully in the rest of the Forum's activities. Other respondents, including both livestream attendees and Forum participants, wanted better insight into how the project team selected participants for the Forum or to have the project team increase the number of in-person participants.

#### What people learned at the Forum

Many participants noted that the Forum helped uncover common ground across participant roles and institutional types, as well as the realization that not everyone shared the same understanding of common challenges, or the same priorities. Many participants were nonetheless able to obtain a deeper understanding of the shared struggles around archival discovery and delivery across institutions, and generally felt validated knowing that they were not facing these challenges alone. They also noted that they learned about the tension between collaborative efforts balanced against local needs, and that sharing tools built by one institution can be challenging because they will not always be useful.

Participants reported learning about the range of technologies used across different archives for the purpose of archival discovery and delivery, most notably from success stories and evaluation of tools used at other institutions. Participants also noted that the Forum was a useful opportunity to learn about existing collaborative efforts towards a national finding aid network. Others noted that the Forum provided useful momentum towards collaborating on a shared virtual reading room service. Overall, these reflections also aligned with recognition made by several participants that there needs to be shared responsibility or leadership for this activity to continue to move forward.

Several participants felt that the facilitation techniques adopted were remarkably successful at supporting information exchange in a large group, and expressed plans to explore or encourage their adoption in other contexts. Some participants expressed a desire for a publicly shareable version of the "playbook" used by the Forum's facilitators and project team. One participant also noted that they learned that feedback to the facilitators was itself important, and appreciated the mindfulness with which the facilitators accepted and acted upon that feedback. Another participant expressed relief to a

notetaker for the Forum when they were told that physical copies of the playbook were available at the table for the facilitators and notetakers to follow. This participant noted that having this knowledge in advance and in the moment would have helped them better interact with the Forum by seeing the connections, impact, and structure of its activities. This also reflects the importance of providing better insight into the plans for the Forum or similar events to support participants with varied styles of learning and comprehension.

Some Forum participants described leaving the event with a greater understanding of a variety of concepts surrounding archival discovery and delivery. In some cases, participants reported that shared goals were themselves a valuable takeaway from the Forum. Participants also learned more about the political and economic factors that archives face, and noted that many issues around archival discovery and delivery relate to resources, labor issues, institutional priorities and power. One participant noted that they learned how using open source software, or participating in an open source community, can be a privilege, while another described learning that technology is highly bound to cultural issues in and across organizations.

For some participants, the discussions around equity and inclusion in archives were illuminating. Several participants indicated that learning about the work of institutions actually doing post-custodial and reparative work was valuable, as was learning about work within tribal and indigenous libraries and archives. Moreover, several participants also noted they learned about the perceptions around decolonization and anti-racist work, the unevenness of understanding these concepts across Forum participants, and how these practices might be incorporated into their day-to-day work. Forum participants also learned from one another about different practices, such as offering office hours on systems for public services staff, and planned to implement similar practices at their home institutions.

#### The most valuable experience that the project can offer

Forum participants had extensive suggestions on the most valuable experience the Forum could offer. Many suggested that the Forum and participants grow into a community of practice, and facilitate opportunities for collaborative work on ideas from the crowdsourcing activity at the Forum, or other projects related to archival discovery and delivery. Certain participants noted that this could be achieved by providing a space for continued conversation and organized activities over time. Some participants suggested that the Forum could help the community organize around addressing and refining the prioritized actions that were shared, including by identifying ongoing work in these areas to prompt action or build networks, or providing a community framework to coordinate and maintain accountability for those actions. This might include a platform for continued communications and continued participant input, as well as an expansion of the call for participation to others with aligned responsibilities and interests. Some proposed activities that allowed written contributions from each participant, including mapping out different systems integrations, or identifying underserved user groups and understanding their needs or preferences around archival discovery and delivery. Other participants noted that additional interactive virtual meetings open to all archivists, or events at local,

regional, and national conferences, would also be valuable. A few also suggested that the Forum create opportunities for cross-institutional knowledge-sharing, such as pairing technical services staff with public services staff.

Some participants and webinar attendees were interested in further incorporating user experience research methods in archival discovery and delivery. Others suggested that support for both professional networking and practical advice on tool selection, and supporting the further sharing of workflows, methods, and user studies results, would be an interesting role that the Forum could play after the event. One participant suggested that the project focus enable participants to plan an international research agenda that illuminates the needs of users who discover and rely on archival collections.

Several participants suggested that the Forum could play a role in further amplifying concerns raised at the Forum by undertaking targeted outreach to administrators and managers, connecting smaller groups working on similar problems and outcomes, and working to better include and understand the needs of indigenous organizations. Suggestions about facilitation included ensuring a space that allowed for deeper conversations on nuanced topics was important, and that building more time for reflection would be helpful. One participant also noted that clarity on the role of participant advisors and better identification of the facilitators would have been useful.

## Emerging themes

### Day 1

Day 1's focus on divergent thinking led the project team to expect to get a broader understanding of how participants viewed archival discovery and delivery. As noted earlier, presentations and activities focused on encouraging everyone to think about possibilities and to build energy.

### Plenary presentations

The plenary presentations from participants were intended to provide a broader perspective on archival discovery and delivery and to establish the potential divergence in concerns, both within each thematic grouping and across them. In the session on *The Evolving Systems Ecosystem*, Forum participants heard from a range of institutions about their recent efforts to adopt new discovery systems. Institutions took a variety of approaches: building new homegrown systems, wiring together microservices via APIs and custom integrations, or selecting from several types of proprietary software. Factors that impacted the selection of a solution included the organization's size, previous archivist and IT staffing, and which software systems institutions were migrating away from. Across institutions, presenters emphasized the importance of interdepartmental collaboration in managing the complexity of migrating to new systems.

In *Networks and the Big Picture*, presentations focused on upcoming trends in archival aggregation. Both speakers focused on the importance of avoiding the siloing or exclusion of archives from future discovery work. Adrian Turner reported on California Digital Library's ongoing research on establishing a national finding aid network. In a concerted effort to move away from a "build it and they will come" mindset, NAFAN's work focuses on understanding and validating user needs, scoping potential maintenance costs, and designing intake to minimize technical debt for regional aggregators. Merrilee Proffitt of OCLC Research warned of the potential for archives to be siloed or excluded from other work around linked data and artificial intelligence.

In *Ethical, Legal, and Cultural Concerns*, highlighted areas such as privacy, cultural protocols, and copyright that impact archival discovery and delivery. On the policy end, Amanda Whitmire (Stanford University Libraries) illustrated how FERPA restricted access to making undergraduate environmental research widely available. Greg Cram (NYPL) detailed how the cost of rights review forms a bottleneck on making audiovisual collections available online. Tanis Franco (University of Toronto, Scarborough) and T-Kay Sangwand (UCLA) highlighted the importance of providing finding aids and training materials in languages relevant to the communities described and served by archives.

In *Impacts on Public Services and Outreach*, presentations focused on the tension between understanding users and their needs and addressing those needs. Constraints discussed by presenters included the need to support more complex models of access, addressing gaps in infrastructure and other essential services, and providing opportunities for active engagement for staff and students.

#### Mad Tea

The Mad Tea exercise provided participants with the opportunity to raise shared concerns around archival discovery and delivery. At the end of the exercise, each table shared their answers to the question "What are the biggest opportunities we have in terms of improving archival discovery and delivery?" The primary themes that arose from sharing were: collaboration across repositories and technology platforms, in particular sharing knowledge and material resources; a need to better understand our vast community of users so that we are well positioned to support their research; open source, community development that is thoughtful and impactful; and the necessity to aggregate and share archival collections data.

#### Speedboat

To encourage divergent thinking and build upon the Mad Tea exercise, attendees participated in the Speedboat exercise to identify *sails* (drivers) and *anchors* (hindrances) to archival discovery and delivery. In the Sails category, common themes were: access to resources, such as time, money, and permanent staff; a collaborative work environment that includes good leaders, colleagues who are open to change, and trust; functional, well documented workflows; and advocacy and engagement across and outside of the organization in the form of stakeholders and champions. In the anchors category, common themes were: lack of resources, such as time and precarious labor; "legacy"



problems, such as technical debt and processing backlogs; organizational issues, such as silos, risk-aversion, low morale and burn-out culture, and bad leadership; copyright; and embedded bias and oppression within the systems and standards used in archival discovery and delivery. In general, this exercise brought to light organization-wide drivers and hindrances that impact archives and special collections.

#### Low Tech Social Network

While intended to orchestrate divergent thinking, the Low-Tech Social Network exercise did not reflect any significant themes related to the focus of the Forum. Some participants reflected on professional connections or shared areas of work, while others focused on other areas of personal interests.

#### Retrospective

Day 1 of the Forum ended with an audience-wide retrospective, using the 4 L's technique to discuss what they liked, learned, lacked, and longed for. Participants liked the variety of activities for the day, the catering, the presentations, meeting new people and sharing experiences, and the communal nature of the gathering. Participants remarked that they came away with a greater understanding of the context they were working in, as well as the differences in roles and workflows across different institutions. In general, participants noted they learned more about the overall discovery landscape from the day's presentations and discussion. Participants felt that the day's events were lacking in the opportunity to reflect on the larger goals and purpose of the Forum, user insights and perspective, and wanted more down time for introverts. By the end of day one, participants found themselves longing for more discussion time and a deeper inquiry into certain issues, more time for question and answer sessions after the presentations, and additional perspectives from HBCUs.

#### Day 2

##### Context Map

The Context Map exercise asked each table to identify contextual factors for archival discovery and access across six vectors, including the political and economic climate, stakeholder needs, technological factors, "uncertainties," as well as two "trend" vectors determined by the participants at each table. Despite the relatively abstract scaffolding, the context maps created at each table proved to be surprisingly consistent. Broad emerging themes included a focus on meeting evolving user expectations and needs, including in the context of teaching, learning, and research; as well as professional labor trends. Societal trends beyond those considered primarily political or economic were also broadly featured and crossed multiple vectors.

One common takeaway was that while several of the major societal challenges identified are not ones that participants are perhaps best positioned to solve in their professional capacities, the most immediate challenges are not intractable, but will require broad collaboration and significant institutional investment and support.

Recurring factors and emerging trends across vectors included:

- *Political/economic*: devaluation and defunding of cultural memory work; unequal distribution of funding and competition for limited resources; precarious labor/gig economy; lack of transparency in our political systems; less accountability and general attack on facts/history; focus on STEM negatively impacting the humanities; institutional overemphasis on return-on-investment; wealth inequality leading to inequitable access to cultural heritage materials/digital divide; collection monetization by donors and institutions; privatization and monetization of user data; climate change and its broader impact on our lives and institutions; ethics of ownership; ethics of representation; copyright and access restrictions
- *User-focused*: vast spectrum of potential users and their needs; expectations for easy, unified, streamlined access; access to ubiquitous commercial digitization and storage services; remote research and virtual reading rooms; accessibility needs; teaching/research trends such as an emphasis on primary source materials and archival literacy in undergraduate education; digital literacy; data reuse; archives in the research lifecycle; on-demand digitization; on-demand learning; privacy concerns; right to be forgotten.
- *Technological*: systems integration; metadata interoperability protocols and APIs; software dependence and emulation; shift from record to entity-based description (linked data); online viewers; open source; machine learning/artificial intelligence.
- *Uncertainties*: (cut across all categories).
- *Participant-selected trends*: factors impacting institutional labor/resourcing (7 tables selected this trend); factors impacting user behavior and expectations for discovery/delivery (5 tables selected this trend); factors impacting institutional policies/activities (4 tables selected this trend).

## TRIZ

TRIZ asked participants to identify the unproductive or counterproductive behaviors that encourage or reinforce barriers to archival discovery and access. The behaviors/actions identified align with emerging themes across five categories:

- *Institutional*: A lack of clear decision-making responsibility, leadership, and mission; a lack of institutional bravery and risk tolerance; a scarcity mindset that drives inequitable labor decisions.
- *Labor/Economic*: A trend towards adopting temporary/term/contingent staffing models, leading to lack of continuity not only for employees, but for the work and responsibilities themselves; less public funding leading to greater dependence on private donors/granting agencies, intensifying a focus on quantifiable success; data-driven processing priorities can perpetuate economic inequality or continue to suppress inclusive access to collections. These behaviors and trends are exacerbated at smaller, public, and/or less resourced institutions.

- *Political/Legal*: Threats to fair use and other copyright exceptions.
- *Technological*: Continuing to pursue a technology if it took a lot to implement (sunk costs).
- *User-focused*: User privacy not respected or considered: institutional collaboration with law enforcement and intelligence; retention of usage data; user requirements, needs, and experience not considered: a lack of user studies, user research, and usability testing. Lack of compliance to online accessibility standards; challenges to physical access: economic and physical barriers that make collections inaccessible, e.g. physical spaces that are not ADA-compliant; gendered restrooms or restrooms without changing tables; parking costs.

### Affinity Map

Within the Affinity Map, participants were asked both to brainstorm individually, and to identify emerging patterns in those ideas through clustering them into groups. Accordingly, the emerging themes reflected in this description were initially identified by the participants themselves. The project team have clustered these further in preparing this report, with the original clusters below for each associated question (“Changes” and “Steps”).

- Addressing structural barriers and oppression
  - *Changes clusters*: “anti-racist practice”; “disrupt hierarchies and racism”; “ethical responsibilities and decolonizing the archives”; “removing or lowering barriers in the culture of our spaces”; “increase access”; “accessibility”; “responsible access”
  - *Steps clusters*: “multi-language and cultural awareness”; “DEI”; “DEI + labor”; “inclusive description”; “accessibility”; “improve data”
- Ethical access and transformational relationships with communities
  - *Changes clusters*: “ethical responsibilities and decolonizing the archives”; “responsible access”; “creator needs”
  - *Steps clusters*: “outreach”; “open/expand leadership”; “community outreach and collaboration”
- Advocacy, organization, leadership, and staff development
  - *Changes clusters*: “staff empowerment”; “library culture”; “professional skills and training”; “building staff skills”; “push back”; “advocacy and awareness”
  - *Steps clusters*: “general principles & values & culture shifts”; “affecting staff education and support”; “transparency about our processes and strategies”; “improve teaching & education for staff and community”; “open/expand leadership”; “influence professional organizations towards positive change”; “advocacy”; “open/expand leadership”
- Addressing user needs and understanding users
  - *Changes clusters*: “user needs”; “involve users”; “users and usability”; “user focus”; “users”; “accessibility”

- *Steps clusters*: “users/usability”; “user studies, testing/UX”; “finding and developing user centered tools and workflow tools”; “research user needs”; “UX- improve/do testing”
- Improving communication and collaboration within organizations:
  - *Changes clusters*: “collaboration”; “high level/beyond archival collaboration”; “sharing resources/ideas”; “sharing knowledge with communities (professional and non)”
  - *Steps clusters*: “multi-institutional collaboration”; “transparency about our processes and strategies”; “transparency/documentation” “communicate”; “share/collaborate”; “build consortia/ collectivize (contribute to/share)”; “vendors”; “collaboration”
- Strategic planning and strategic thinking
  - *Changes clusters*: “mindset/strategy”; “aspirations”; “library culture”; “high level/beyond archival collaboration”
  - *Steps clusters*: “stakeholder goals”; “navigating true north”
- Improving systems interoperability and integration
  - *Changes clusters*: “systems interoperability”; “systems and integration”; “integrations”
  - *Steps clusters*: “systems integration and practices integration”; “systems and system integration”; integrate/ use appropriate systems”
- General technology and systems improvements
  - *Changes clusters*: “simplifying systems”; “leverage automation”; “systems and integration”; “build better stuff”
  - *Steps clusters*: “tech advancements and feature requests”; “systems integration and practices integration”; “better workflows”; “systems and system integration”; “integrate/ use appropriate systems”; “search”
- Discovery and delivery
  - *Changes clusters*: “search”; “delivery”
  - *Steps clusters*: “search”
- Improving aggregation, data interoperability, and cross-LAM discovery
  - *Changes clusters*: “aggregation” across multiple groups; significant discussion of “bridging the gap” between digital libraries and archives; “systems interoperability”
  - *Steps clusters*: “aggregate”; “APIs + interoperability”
- Improving archival description and metadata
  - *Changes clusters*: “description”; “metadata”; “description and/or metadata”
  - *Steps clusters*: “description”; “inclusive description”; “improve data”; “effective / transparent / quality metadata”
- Resourcing and staffing, including ethical aspects
  - *Changes clusters*: “resourcing”; “\$\$\$”; “sharing resources and ideas”
  - *Steps clusters*: “resources”; “advocacy”; “staff and labor”; “DEI and labor”; “\$\$\$”; “advocate for permanent labor and funding”
- Proactively responding to risk management, copyright, and other rights issues
  - *Changes clusters*: “clarify copyright and open source statuses”; “risk management”

- *Steps clusters*: “rights/reuse”; “transparent rights”

While participants and facilitators both found this activity challenging, many of the clusters represent cohesion in topics across the five groups. However, there was also significant topical cohesion not identified in the clusters above around ideas intended to support indigenous communities and tribal archives, such as creating a tribal archives consortium, promoting indigenous data sovereignty, supporting orthography and typology for indigenous languages, and better understanding what systems can best support specific tribal communities.

#### 15% Solutions and 25/10 Crowd Sourcing

The final activity on Day 2 involved two shorter activities that were conjoined to allow individual ideas and smaller steps for action to expand into broader and bolder possibilities. The 15% Solutions activity was intended to have participants reflect on individual steps that they could take themselves, without needing additional resources or permission. Key themes from participants’ answers to this activity include:

- Finding opportunities for action and advocacy;
- Using their current influence to advise, raise, or act on ethical and inclusion concerns (e.g. avoiding use of contingent labor);
- Improving communication and collaboration, including sharing documentation, experience, and information resources (e.g. best practices), as well as regular calls with colleagues to share information;
- Understanding more about users (including data gathering and formal assessment), undertaking user testing, and sharing accessibility and usability feedback with platform maintainers;
- Envisioning new working relationships and understanding more about the roles and responsibilities of colleagues across both teams and organizations (especially between archives and technology workers);
- Evaluating new systems and tools (including archival discovery systems and machine learning), gathering and specifying requirements, and identifying key points of integration between systems;
- Rethinking workflows supporting digitization and reproduction (including both rights workflows and workflows used by researchers);
- Increasing concrete support of aggregation and consortial networks;
- Improving the discovery of born-digital material by including it in finding aids;
- Revising description and metadata to use inclusive and anti-racist language, including existing resources to address issues in description (e.g. Archives for Black Lives in Philadelphia’s *Anti-Racist Description Resources*);
- Cross-training or improving skills, especially technical skills;

- Strategizing thoughtfully, and asking more questions about why specific activities (e.g. digitization) are prioritized;
- Reducing the use of archival jargon;
- Removing barriers to access, both physical and financial;
- Taking direct input from community members;
- Avoiding burnout; and
- Translation of archival description.

The themes identified in the outcomes of this activity suggested that participants were able to reflect on the connections throughout the day's activities. The project team followed this activity with the 25/10 Crowd Sourcing activity with the intention of having the earlier activity's ideas serve as a "springboard" for the bolder steps identified by participants in the final activity of the day. While the full list of ideas generated by activity is included as an appendix to this report, the generated were grouped by the project team into one or more of the following sixteen themes:

- Structural change, including integrating anti-oppressive and inclusive practices to archives and technology work;
- Developing shared regional or national projects and infrastructure;
- Developing "virtual reading rooms";
- Improving and rethinking description and metadata;
- Community engagement and community-specific platforms;
- Collaboration and communication between roles and institutions;
- Collection development and digitization strategies;
- Creating best practices and other forms of professional guidance;
- Prioritizing and investing in open source software development;
- Gathering and analyzing data;
- User experience and usability studies;
- Crowdsourcing;
- Prioritizing accessibility;
- Sharing resources;
- Improving and simplifying discovery and delivery and the technology that supports it; and
- Improving and rethinking policies around access, rights, and reuse.

There was a notable demand identified by the participants to enact work to develop larger collaborative networks around improving archival discovery and delivery, especially around shared software or platform development, and a clear desire to reduce the use of "bespoke" or "homegrown" solutions for archival discovery and delivery. This intersected with there being significant interest in work towards establishing a national "virtual reading room" for restricted material.

Additionally, there was significant interest in sharing resources between institutions, with an expectation that well-resourced institutions could commit ongoing funds. Many participants also recognized more user studies, especially a larger scale study across multiple institutions, could be beneficial. At the same time, these ideas surfaced a strong desire for structural change that can also be expressed in part through archives and technology work. Participant reflection demonstrates the recognition that participants needed deeper relationships with the communities they serve, which could help to develop “hyperlocal” systems suited towards the needs of those communities.

### Retrospective

In addition to the feedback received during the retrospective discussed above, the following emerging themes that reflected the day’s activities were identified by participants:

- Cultural challenges are harder to fix than technical ones, and investing in people and relationship building even within one’s institution is essential to this work. User needs must be prioritized, and in fact, professional trends in archives were seen by some as completely disconnected from user trends.
- Participants noted that connections across activities became more coherent, and while they saw the synergy between the activities, some lacked sufficient focus to carry ideas across exercises.
- Collaboration and information sharing are essential, even if it is clear that institutions may be working towards divergent goals. Participants noted that there are often similar issues and concerns across institutions, even when those institutions or their goals may be perceived as very different. Strategic needs, as well as values, were seen as shared across institutions, and we should find opportunities to communicate those ways to align our work more. In addition, participants emphasized that we cannot afford to leave smaller peers behind as this work advances.
- The Forum’s activities on day 2 helped reinforce that all stages of the archival workflow impact archival discovery and delivery.
- There is a prevalent reliance on temporary labor in archives, which was reinforced as an urgent problem in undertaking improvements to archival discovery and delivery.
- There is a real interest in developing a community around structural change, decolonization, and equity concerns in archives and special collections, and that continued work is necessary to center the expertise of Black, Indigenous, people of color, queer, non-binary, and other marginalized people who participate in events like the Forum.

### Day 3

As Day 3 was intended to have convergent thinking as its focus, the project team expected that themes and ideas would continue the coherence expressed on Day 2. The intent was to activate the participants to interpret these connections in ways that would lead to potential future action, and provide guidance to efforts of the Lighting the Way project.

## Social Network Webbing

The focus of the Social Network Webbing exercise was to understand working relationships and power in relation to the Forum and the work of archival discovery and delivery. Participant groups varied in their approach of how they selected people not represented in the Forum: some groups identified roles or other groupings of people, while others identified individuals in relation to specific roles. Groupings of people identified as missing from the conversation included the following:

- Library administration and leadership (viewed as an important conduit to resources);
- Users, including “casual researchers”;
- Curators, bibliographers, and subject librarians responsible for collection development;
- Funders (e.g. granting agencies);
- Technology vendors;
- Other cultural heritage organizations: museums, public library archives, etc.;
- Communities documented in collections;
- Donors;
- Experts in specific domains, including preservation (both physical and digital), copyright, scholarly communication, indigenous languages, and accessibility;
- International partners;
- Library-wide technical services and IT groups;
- Acquisitions staff;
- Term archivists;
- Adjacent professional communities (e.g. the BitCurator Consortium, ArchivesSpace, Aeon users);
- Public services staff;
- Privacy and security experts;
- Global south archivists, archivists of color, and archivists from specific regions like Appalachia;
- National organizations and initiatives, including DPLA, the National Archives and Records Administration, and Library of Congress;
- Professional organizations; and
- Individuals who could be boosters because of their platforms.

In reviewing blockers and boosters for this work, many groups reflected existing and known cultural challenges and strengths within their organizations, and several groups noted that some groups could be both boosters and blockers. Participants also consistently noted the importance of users to be engaged with the conversation, and resource allocators or providers (administrators, funders, and donors) influence this work.

## Who/What/When Matrix

As the Who/What/When Matrix, the final activity was intended to draw the Forum to a close, and provide meaningful next steps that participants could take alone or together to improve archival discovery and



delivery, or to otherwise take action on ideas that came up in the Forum. As described above, the activity used the top-scored ideas drawn from 25/10 Crowd Sourcing as a starting point for their own ideas. While an anonymized list of all actions from this activity is included as an appendix to this report, themes across the actions include the following:

*Personal research:* Many participants indicated that they were interested in conducting personal research to deepen their understanding of topics brought up at the Forum. A selection of those topics include:

- Learn more about “minimal computing” and how it can apply to archives and digital collections
- Learn more about anti-racist and feminist frameworks
- Learn more about POC-centered [people of color-centered] materials in the collection
- Read more about instating a reparations framework, and moving away from philanthropic thinking
- Learn more about indigenous traditional knowledge practices
- Learn more about ArcLight implementation at other institutions

*Description projects:* Forum participants also identified ways in which they could change, enhance, or add more description to their collections. These ideas include:

- Work on collection-specific finding aids
- Determine how to integrate crowdsourced description into the repository and collection metadata
- Advocate for indigenous data sovereignty
- Have staff read anti-racist description models, and integrate guidance into local description model
- Explicitly identify women and POC [people of color] in collections materials
- Deconstruct the finding aid
- Revise existing description to remove racist and sexist subject headings
- Contribute to the National Finding Aid Network project

*Copyright work:* Presentations and discussions at the Forum around copyright influenced many participant’s next steps. Some actions participants planned to take around copyright include:

- Continue conversations about making archival data open
- Take a copyright risk management course
- Develop a list of copyright variables relevant to fair use and virtual reading rooms
- Open a conversation with the State House of Representatives to update copyright law, and sharing the template so others can do the same
- Revise copyright workflows to adhere to a risk assessment model instead of a rights clearance model

*Public Services:* For some participants, doing public-facing work around outreach felt most impactful. Some ideas include:

- Host zine workshop
- Schedule events to build connections with underrepresented communities

*Patron services and user research:* The necessity of understanding users of archival systems was a paramount concern throughout the Forum. Many participants saw opportunities to work directly with patrons and perform user research. Specific actions listed include:

- Develop a policy to fund user-driven digitization
- Share findings of local user study
- Solidify connections to underrepresented user communities
- Develop a digitization and digital collections strategy to best serve patrons
- Gather and create resources for usability and accessibility for archives

*Technical systems:* Forum participants made a clear connection between the archival systems that we use and issues around archival discovery and delivery. Many participants identified both local and national steps to take to explore these connections with more depth:

- Continue doing open source development with Islandora 8
- Establish a Virtual Reading Room service:
  - Begin conversations with stakeholders
  - Engage Atlas Systems
- Develop an ArchivesSpace API helpers library
- Send a list of feature requests to Circa developer at NCSU
- Work on developing Circa, including accessibility audit
- Convene a meeting with stakeholders at local institution to make systems interoperable
- Replace bespoke finding aid application with open source product

*Professional service:* Some participants identified actions they can take in the context of professional organizations, or within the professional community more broadly, in order to enact change. Ideas include:

- Do DEI [diversity, equity, and inclusion] work with SAA education committee
- Find opportunities to discuss rightsstatements.org with archival community
- Bring awareness to institutions with large holdings of indigenous materials

## Retrospective

In addition to feedback received during the retrospective, the following emerging themes that reflected the day and Forum overall were identified by participants:

- Non-advice and non-critique focused activities were valuable in allowing participants to communicate their ideas in the Forum setting.

- The desire for structural change, especially decolonizing archival work and associated technology work was strong for some people, although some participants also noted that they lacked other people committed to bringing decolonial values into their technology work specifically.
- Some participants also expressed a strong desire for a greater presence from indigenous and tribal archivists, and suggested that hearing and hosting more of them would be helpful for others to empathize or assist them in their work.
- There was a strong desire to identify what next steps could occur, both in terms of the activities of the Lighting the Way project, as well as how these efforts could connect to the interests or goals of individual participants. This also reflected in participant feedback that mentioned that more time for unstructured conversation would have been beneficial.
- In an open question and answer session following the retrospectives, participants also wanted to know how gaps in representation as identified through the Social Network Webbing activity would be addressed in the working meeting. Facilitators and participant advisors noted that this was an area in which more work and conversation were needed, and agreed to follow up.

## Discussion and next steps

Participant feedback and the themes identified throughout the Forum provide important insights into what was most valuable and what could be improved about the Forum, as well as how to structure future project activities. Given the disruption to the project caused by the COVID-19 pandemic, which led to the postponement of the Working Meeting and delays in community engagement, this information is also valuable in considering how the project can refocus activities to meet its overall objectives. The project team has identified the following areas for further discussion and attention as it continues planning its activities. Overall, the project team has been considering revisiting the overall approach of the project to include both a broader “open track” with a low level of participation and engagement and a narrower group focused directly on advancing progress on the project deliverables. This follows in part the project team’s original plan for the working meeting, but we expect that that event may be organized differently than originally intended. Considering lessons learned from the Forum, both of these tracks will be informed by a more focused understanding of archival discovery and delivery. We will refine our facilitation techniques to reinforce concrete goals and expectations, to give participants dedicated time to reflect and organize their thoughts, and make space for discussion around more nuanced topics, all the while meeting the project’s overall goals.

## Scope and focus

The project team has spent significant time reflecting on the feedback regarding the perceived “scope creep” and lack of focus felt by Forum participants. In some ways, this is unsurprising, as Forum participants were selected across a wide range of roles and expertise, and the intent was to make the Forum broadly inclusive across this range (e.g. the communication to prospective participants that they need not be “technical experts”). The Forum planning team also took a slightly broader understanding

of archival discovery and delivery to allow for additional generative conversations to take place. However, given the feedback, the project team needs to define and communicate scope for the project and its remaining activities more clearly. Better definition of archival discovery and delivery, and communication of that definition, is an essential part of this, as a definition based solely on systems integration may be too narrow. This consideration must also contend with the suggestions from Forum participants about the broader need for user studies across archives and special collections, and the desire for more depth around how decolonization and anti-racism will impact archival discovery and delivery. Given the impact of the COVID-19 pandemic and broader efforts to achieve racial equity and address systemic racism, these priorities have likely become even more important. At the same time, resources and structural arrangements of many institutions have been significantly impacted. Future efforts of the project to engage participants should allow for continued discussion and reflection on how to consider and incorporate these factors into all work supporting archival discovery and delivery.

## Participation and community engagement

Overall, participants gave positive feedback around the breadth of roles and responsibilities represented by Forum participants. Despite the project team increasing the overall capacity of the Forum, both livestream viewers and participants desired opportunities to engage more broadly, and wanted an even larger convening. The project should consider how remote participation can be best leveraged to meet the project's goals and objectives, especially as the pandemic will likely limit travel until well into 2021. The project team expects that the Working Meeting, originally scheduled for June 2020, will be held entirely online with remote participants, with synchronous and asynchronous components. The project team is considering having a broader "open track" with a low level of participation and engagement, and a narrower group focused directly on advancing progress on the project deliverables intended as the focus for the Working Meeting. In addition, the project team will revisit the list of groups identified as missing or desired from the Social Network Webbing exercise and consider how participation can be targeted or refined to include them. Most notably, participants highlighted outreach to administrators and managers to ensure concerns are suitably amplified.

Participant feedback identified the value of the project providing a community framework for moving activities forward, with particular interest in developing larger collaborative networks. Specific areas of focus within these activities could include communities of practice supporting archives-focused user studies, virtual reading rooms, or other topics related to shared software development. In addition to the Working Meeting, which is focused on advancing progress on specific written deliverables, the project team is considering holding additional online events for further engagement. These events and community frameworks also should identify ways in which they can be sustainably connected to other efforts and groups beyond the grant period, such as sections of the Society of American Archivists, Digital Library Federation working groups, and communities and consortia supporting specific software or tools such as ArchivesSpace or BitCurator.

All of these possibilities under consideration must also be balanced by the availability of project resources in terms of both budget and personnel, especially given the challenges identified in the facilitator retrospective. While valuable, broader participation in online events and lightweight community frameworks will take planning and time to execute successfully, so that they are of highest value. The project team will consult with the project's participant-advisors, and potentially with Forum participants, on which options are most impactful and can be balanced against resource constraints.

## Facilitation and structure of meetings and activities

While the facilitation and structure of the Forum overall received positive feedback from participants, the project also team noted areas for improvement and refinement. Participants stated that additional presentations and reinforcement of concrete goals and expectations would have helped situate them at the Forum. The project team will carry these recommendations forward into its future activities. Additionally, consistent feedback regarding the need for participants to have dedicated time to reflect and organize their thoughts has led the project team to ensure that this is prioritized in future meeting and activity planning. The project team will also identify facilitation techniques that can be used to make space for discussion around more nuanced topics, beyond relegating them to an unactionable "parking lot" list. Finally, the project team is determining how to best respond to the feedback requesting a sharable version of the Forum playbook, and what form related resources produced for external audiences might take to ensure they provide adequate context and detail about the facilitation methods and activities chosen.

## Written contributions

In addition to the statement of principles developed within the forthcoming working meeting, the integration handbook serves as a primary written output for the project created through contributions from project participants. It is intended to describe use cases related to archival discovery and delivery for a particular institution or project, the systems to be integrated, and specific integration patterns and strategies as practical recommendations. It has become clear that this working title and focus does not resonate well with potential contributors, and thus the project team needs to provide a clearer description of what contributions could look like. The intent for this particular deliverable is to have contributors communicate about successes or challenges regarding archival discovery and delivery; this may take a variety of forms, including mapping out different systems integrations, identifying underserved user groups and understanding their needs around archival discovery and delivery, or providing a position paper on a particular area of interest. The project team will work to create a set of clear guidelines for contributions as it continues to organize its engagement activities.

## Next steps

With a draft form of this report ready and IMLS approval of a no-cost extension for the project for another year, the project team spent much of the summer and fall of 2020 reengaging with the project's participant-advisors to consult upon project direction. The project team also plans to spend much of

its time over the coming months on community engagement, both with Forum participants as well as the broader project audience. This is intended to share both the outcomes of the Forum as well as to start the process of engagement with potential contributors to the project's written products. The project team looks forward to engaging with participant-advisors and others on feedback regarding project direction, and will resume communicating regularly through its website, social media, and email list channels. The project team expects to issue a call for participation in January 2021 for the working meeting and authorship of contributions to the project's handbook, with the working meeting to be held over a series of two-hour online meetings and asynchronous work over 4-6 weeks in Spring 2021.

## Appendices

Application form

Community Agreements and Code of Conduct

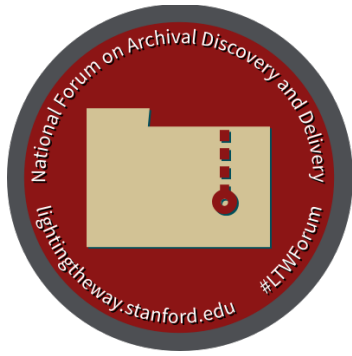
Lighting the Way Forum Playbook

25/10 Crowd Sourcing Ideas

Anonymized Who/What/When Matrix actions

Feedback survey questions

Quantitative feedback summary



# Lighting the Way Forum: Application Form

**NOTICE: Please submit all applications through the online application form linked from the announcements and project website. This PDF of the application form is provided for your reference only.**

---

## Start of Block: Background and Call for Participation

Stanford University Libraries invites archives, library, and technology workers and those in related fields to self-nominate as participants for [Lighting the Way: A National Forum on Archival Discovery and Delivery](#), funded by IMLS grant LG-35-19-0012-19. The forum event will take place at Stanford University in Stanford, California from February 10-12, 2020, with approximately 50 participants. Grant funds will allow us to fund partial to full travel costs, meals during the event, and lodging for most participants.

To apply, please complete the following application form, which requests information about you, your responsibilities, and your work related to focus of the project. Please answer all questions to the best of your ability. The application should take 15-20 minutes to complete. The initial call for participation will be open from November 13 to December 15, 2019. Our project team will then review the nominations on a rolling basis, and will respond no later than January 10, 2020.

Information gathered in this application form will be used to select participants for the Forum, to inform Forum planning, and to identify opportunities for the project team to follow up with you. **Your responses will not be shared beyond the [project team and its participant advisors](#).** If you have any questions or feedback about the application process or the project, please contact Mark A. Matienzo, the Project Director, at [matienzo@stanford.edu](mailto:matienzo@stanford.edu).

## End of Block: Background and Call for Participation



---

Start of Block: Background information

**Background information**

The following information is about you and your affiliation with an organization or project.

-----

Contact information

Name (1) \_\_\_\_\_

E-mail address (2) \_\_\_\_\_

Primary affiliation (e.g. employer or project) (3)  
\_\_\_\_\_

Position title at primary affiliation (4)  
\_\_\_\_\_

-----

Which of the following best describes your primary affiliation?

- 2 year college/university (1)
- 4+ year college/university (2)
- Other academic institution (3)
- Government agency (4)
- Tribal agency (5)
- Nonprofit organization (6)
- For-profit organization (7)
- Community archives (8)
- Self employed/Consultant (9)
- Other (please specify) (10)
- Don't know (11)



How would you describe your primary affiliation?

*Examples: "A small special collections library within a large public library system"; "a vendor focusing on digital collections systems"*

---

---

Page Break

In which US state or territory do you currently reside?

▼ Alabama (1) ... I do not reside in the United States (58)

---

*Display This Question:*

*If 50 States, D.C. and Puerto Rico = I do not reside in the United States*



In which non-US country do you currently reside?

*Please note that while we welcome applications from potential participants outside of the United States, international travel support is only available on a case by case basis.*

▼ Afghanistan (1) ... Zimbabwe (1357)

---

Page Break

We strongly encourage self-nominations from individuals who identify with or whose work directly serves underrepresented and/or marginalized populations, including those not well-represented within libraries, archives, or technology (e.g. women, people of color, LGBTQ+, ability/disability, non-binary gender identities, etc.) We also encourage applications from members of underrepresented and/or marginalized groups that don't fit into the categories listed above.

---

Do you identify as a member of any underrepresented or marginalized populations?

- Yes (1)
  - No (2)
  - Don't know (3)
- 

Does your work support underrepresented or marginalized populations?

- Yes, it directly supports underrepresented or marginalized populations (1)
  - Yes, it indirectly supports underrepresented or marginalized populations (2)
  - No (3)
  - Don't know (4)
- 

Page Break

---

Do you receive travel support from your employer or primary affiliation for meetings, conferences, or other professional travel?

- Yes, I receive full support (1)
  - Yes, I receive partial support (e.g. lodging only; flights only; no meals) (2)
  - No (3)
  - Don't know (4)
- 

If selected, will you need the Lighting the Way Forum to fund your travel to attend in person?

- Definitely yes (1)
  - Probably yes (2)
  - Might or might not (3)
  - Probably not (4)
  - Definitely not (5)
- 

**Regardless of funding**, are you otherwise able to attend the Lighting the Way Forum, to be held February 10-12, 2020 at Stanford University in Stanford, California?

- Definitely yes (1)
- Probably yes (2)
- Might or might not (3)
- Probably not (4)
- Definitely not (5)

End of Block: Background information

---

Start of Block: Information about your current role

## Information about your current role

The following sets of questions relate to your current role or position at [CURRENT\\_AFFILIATION](#).

How would you describe your current role or position at [CURRENT\\_AFFILIATION](#)? (Select all that apply.)

- Archives or library worker (1)
- Technology worker (2)
- Legal, copyright, or risk management worker (3)
- Managing a program that employs archives or library workers (4)
- Managing a program that employs technology workers (5)
- Managing a program that employs legal, copyright, or risk management workers (6)
- Teaching in an archival, library, or technology-related education program (7)
- Studying to be an archives, library, technology, or legal/risk management worker (8)
- Working in another profession or occupation, but with archives or library-related responsibilities (9)
- Working in another profession or occupation, but with technology-related responsibilities (10)
- Working in another profession or occupation, but with legal, copyright, or risk management-related responsibilities (11)

Administering a program serving archives or library interests but not working directly with collections (e.g., consortium, vendor, granting agency, education provider, professional association) (12)

Administering a program serving technology interests but not working directly with archives and special collections (e.g., consortium, vendor, granting agency, education provider, professional association) (13)

Administering a program serving legal, copyright, or risk management interests but not working directly with archives and special collections (e.g., consortium, vendor, granting agency, education provider, professional association) (14)

Other (Please specify) (15)

---

*Display This Question:*

*If How would you describe your current role or position at \${q://QID3/ChoiceTextEntryValue/3}?  
(Sele... = Other (Please specify)*



Briefly describe your current role or position at **CURRENT\_AFFILIATION**:

---

---

Select that which best describes your current employment status in regards to role or position at **CURRENT\_AFFILIATION**:

▼ Employed, full time (1) ... Other (please describe) (8)

---

*Display This Question:*

*If Select that which best describes your current employment status in regards to role or position at...  
= Employed, full time*

*Or Select that which best describes your current employment status in regards to role or position at...  
= Employed, part time*

Please indicate whether your position is a permanent position or a term, temporary, or contingent position:

- Permanent (1)
- Term, temporary, or contingent (2)
- Rather not say (3)

---

*Display This Question:*

*If Select that which best describes your current employment status in regards to role or position at...  
= Other (please describe)*

Please describe your current employment status:

---

---

Page Break



What are your primary duties that relate to **archives/library work** at **CURRENT\_AFFILIATION**?  
(Select all that apply).

- Public services (reference, instruction, outreach, exhibits) (1)
- Technical services (arrangement, description, accessioning, metadata, cataloging) (2)
- Collection development (acquisition, appraisal, donor relations) (3)
- Digital library projects (including digitization) (5)
- Preservation (conservation; physical materials only) (6)
- Born-digital archives or digital preservation (7)
- Other (please describe) (4)

---

*Display This Question:*

*If What are your primary duties that relate to archives/library work at \${q://QID9/ChoiceTextEntry} = Other (please describe)*

Specify any additional duties that relate to **archives/library work** at **CURRENT\_AFFILIATION**:

---

---

Page Break

What are your primary duties or responsibilities that relate to **technology work** at **CURRENT\_AFFILIATION**?

- Software development (1)
- User experience design (2)
- Project management (3)
- Product management (4)
- Support (5)
- Systems administration (6)
- Other (please describe) (7)

---

*Display This Question:*

*If What are your primary duties or responsibilities that relate to technology work at ... = Other (please describe)*

Specify any additional duties that relate to **technology work** at **CURRENT\_AFFILIATION**:

---

---

Page Break

What are your primary duties or responsibilities that relate to **legal/ethical/risk management work** at **CURRENT\_AFFILIATION**?

- Policy development (1)
- Privacy issues (2)
- Copyright/intellectual property (3)
- Legal compliance (4)
- Policy compliance (5)
- Cultural protocols (6)
- Other (please describe) (7)

---

*Display This Question:*

*If What are your primary duties or responsibilities that relate to legal/ethical/risk management wor... = Other (please describe)*

Specify any additional duties that relate to **legal/ethical/risk management work** at **CURRENT\_AFFILIATION**:

---

**End of Block: Information about your current role**

---

Start of Block: Information about your work and projects

**Information about your work and projects in relation to archival discovery and delivery**

This section focuses on getting information about the work that you or your organization/project is doing in relation to the Forum. Please be as specific as you can within the character limits for each question.

"Archival discovery and delivery" is how we describe what people and systems do to find, access, and use material from archives and special collections. Systems that support archival discovery and delivery include but are not limited to those supporting search and presentation of archival description, delivery and presentation of digital objects, request management systems, and interpretation and crowdsourcing.



Please describe your (or your organization/project's) work on past, current or planned projects or needs related to archival discovery/delivery.

---

---

---

---

---



Please list any systems (e.g. software, tools, etc.) that you use in your work to support archival discovery/delivery.

---

---

---

---

---



Page Break

## Successes and challenges

For each question below, please include any detail about specific technologies (systems or tools), how staff across job function work together, institutional contexts, or other issues that describe how your work on archival discovery and delivery has been successful or is challenging.

-----



Please describe any **successes** you have made in archival discovery/delivery.

---

---

---

---

---

-----



Please describe any **current/continuing challenges** you face around archival discovery/delivery.

---

---

---

---

---

-----

Page Break

Would you be willing to present or write about your work (or that of your institution/project) in relation to the forum?

- Yes (1)
- No (2)
- Don't know (3)



Please describe any other areas of expertise, interests, topics, or perspectives you could bring to the Forum.

---

---

---

---

---

**End of Block: Information about your work and projects**

---

Start of Block: Feedback

**Feedback to the Project Team**

This is the final section of the application, and is optional. It allows you to provide additional feedback to the project team, such as recommending other potential participants or suggesting particular topics for discussion. If you have specific suggestions about people or topics, please identify both who/what they are, and why you are proposing them.



Do you have other suggestions about potential participants?

---

---

---

---

---



Are there specific topics you want the Forum to cover?

---

---

---

---

---



Are there specific topics you want the Forum to avoid?

---

---

---

---

---



Do you have other questions/feedback for us about the project?

---

---

---

---

---

End of Block: Feedback

---



## Community Agreements and Code of Conduct

The Lighting the Way project is committed to providing a productive, inclusive and welcoming environment for discussion and collaboration about archival discovery and delivery, following the Stanford University Libraries policy on workplace and sponsored conference conduct.<sup>1</sup> To support this and to further the goals of the project, we expect all participants to follow our Community Agreements and Code of Conduct, including project staff, advisors, event participants, and other contributors.

The Community Agreements outline ways in which we encourage and expect each other to hold safe, engaging, and respectful discussions. The Code of Conduct outlines behaviors which will not be tolerated, how to report concerns or incidents, and how the code will be applied.

### Community Agreements

Our project seeks to address the broader challenge of how to improve archival discovery and delivery, or what people and systems do to find, access, and use materials from archives and special collections. We recognize that this work is supported by a wide range of responsibility and kinds of expertise, across institutional contexts, levels of resourcing, and the types of communities we serve. We also recognize that people may be discouraged or excluded from these conversations in a local context based on their identity or systemic issues including racism, classism, sexism, homophobia, and more. To this end, we have established a core set of principles for the project:

- We believe everyone 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 recommendations across contexts, communities, levels of resourcing.
- We develop recommendations consciously as an inclusive expression of professional ethics and values.
- To be truly transformational, our work must be conducted in a space that acknowledges the power dynamics of bringing together workers across professional contexts, roles, and job classifications, acknowledging institutional privilege, and the lack of representation of marginalized people within the archives, library, and technology sectors.

We expect all participants to practice community by agreeing to the following:

- To ensure only one person speaks at a time, and consider pausing to allow those who need more time to process or interject in conversation to do so.

---

<sup>1</sup> “Workplaces and sponsored conference conduct.” *Stanford University Libraries*, accessed May 3, 2020. <https://library.stanford.edu/using/special-policies/workplace-and-sponsored-conference-conduct/>

- To make space and take space - encourage and yield the floor to those whose viewpoints may be under-represented in a group, and take space made for you as you're able.
- To listen to and respect a person's description of their experiences, including but not limited to those related to marginalization and discrimination.
- To recognize the interdependent nature of our work to support archival discovery and delivery.
- To acknowledge that choices around practice, implementation, and technology vary widely and can be dependent on the availability of resources, and to respect our work as incremental.
- To provide a space where everyone can feel comfortable participating, even if they don't use specific terminology or the perfect way to express their ideas or knowledge.
- To embrace curiosity and creativity, allowing for the opportunity to try new ideas, consider other perspectives, and establish new patterns.
- To use welcoming language (including a person's pronouns) and favoring gender-neutral collective nouns ("folks" or "y'all," not "guys").
- To give credit where it's due, and to uplift each other's work and ideas.
- To accept critique and feedback graciously, and to offer it constructively.
- To seek concrete ways to make our physical spaces and online resources more universally accessible.
- To acknowledge the difference between intent and impact, and to look for ways to take responsibility for the negative impact that we have.
- To be aware of time, respecting the commitment of all participants and project staff to accomplish the goals of the meeting.
- To take the moments that everyone needs to care for ourselves and their community, by paying attention to the needs of your body and mind, and to the welfare of those around us.

## Code of Conduct

The Lighting the Way project seeks to provide participants with opportunities for collaboration that are free from all forms of harassment and inclusive of all people. All communication should be appropriate for a professional audience including people of many different backgrounds. Verbal comments that reinforce social structures of domination related to gender, gender identity and expression, sexual orientation, disability, physical appearance, national or regional origin, body size, accent, race, age, religion, or other marginalized characteristics are inappropriate. Do not insult or put down other participants. Be careful in the words that you choose. Sexist, racist, and other exclusionary jokes are not appropriate for the forum.

Harassment is understood as any behavior that threatens or demeans another person or group, or produces an unsafe environment. It includes offensive verbal comments or non-verbal expressions that reinforce social structures of domination; sexual or discriminatory images in public spaces (including online); deliberate intimidation, stalking, following; threats or incitement of violence; photography or recording without clear permission; sustained disruption of presentations or discussion; inappropriate physical contact; and unwelcome sexual attention.

## Photography and Recording

Presentations from the Lighting the Way Forum (e.g. in the 9:00 AM-12:30 PM block on Monday, February 10) will be live-streamed and recorded. All speakers are required to review and sign Stanford University's speaker release form.

We otherwise ask you to not photograph fellow participants without permission of all those being photographed. Please ensure when taking group photos that everyone in the picture agrees where the photograph will be shared. If you wish to record at the event for personal use, please speak with the project team before the Forum.

## Applying the Code of Conduct

All project participants — including the project team, facilitators, and participants — are expected to abide by this Code of Conduct in person, in online spaces, and while present in any groups of project participants inside or outside a formal project event (e.g. including receptions and informal gatherings). Participants violating the Code of Conduct will be warned and may be asked to leave an event, and in some cases, may be asked to no longer participate in the project. If you are being harassed, witness another participant being harassed, or have any other concerns, please contact a person listed below.

For guidance on how to address reports of violations of the Code of Conduct or Community Agreements, see “Procedures for Responding to Violations of the Code of Conduct and Community Agreements.”

The project team and designated facilitators will be on hand to respond to Code of Conduct violations and assist in following the Community Agreements. If you witness, suspect, or are the target of a violation of the Code of Conduct at the Forum, contact a project team member or facilitator. At events, they are identifiable by distinctive striped lanyards for their badges.

## Procedures for Responding to Violations of the Code of Conduct and Community Agreements

Our project Code of Conduct and Community Agreements are a statement of values. Ultimately, however, it is only as good as its enforcement procedures. This procedure documents actions to be taken by project staff and volunteers in the event of a violation of either the Code of Conduct or the Community Agreements.

### Taking reports

Upon receiving a report of a violation of the Code of Conduct or Community Agreements, ask the reporter if they would like to make a formal report. Let them know that you can't make any promises about how it will be handled, but their safety and confidentiality will be a priority. **Take a written report, or write down verbal reports as soon as possible.** Reports of any length should be taken in a quiet, private space (e.g. the “VIP Room” off the Bechtel Conference Center's Main Hall), not a

reporter's hotel room. If the following information is not volunteered in the written or verbal report, ask for it/include it, but do not pressure them.

- Identifying information (name if possible) of the participant violating the Code of Conduct or Community Agreements
- Reporter's name and contact information
- The approximate time and date of the behavior (if different than the time the report was made)
- Place of the incident
- What happened (try to collect as much information as possible to provide a clear understanding of what occurred)
- Other people involved in the incident

Do not question the reporter's truthfulness. It is your job to maintain a supportive environment and ensure that fair procedures are followed, not to conduct an investigation. **Do not summon law enforcement unless there is a threat to physical safety, or at the request of the reporter** (see Threats to physical safety and law enforcement section, below).

If the reporter is distressed and/or needs additional assistance, offer them a private space to be in, ask how you can help, and make sure they have local emergency contact information (included in the Code of Conduct). Ask if there is a trusted friend they would like you to get; if so, have someone bring that person.

If the incident was widely witnessed: Thank them for the report and tell them you will convene the members of the project team and/or designated facilitators.

If the incident was private: Thank them for the report and say you will convene the relevant project staff if that is okay with them. **Consent is critical.** Be explicit with the reporter about with whom you intend to share the report, e.g. project staff, facilitators, or other volunteers.

Do not:

- Pressure them to withdraw the report.
- Ask for their advice on handling the report or imposing penalties. This is the responsibility of project staff and facilitators.
- Share details of the incident with anyone, including *project staff, facilitators, or other Stanford employees*, without the specific consent of the reporter.

Be aware that people who have experienced harassment and abuse may be re-traumatized if the details become public. In addition, abusers may recognize these details, even if they have been anonymized, become angry at the reporter, and enact further trauma. Again, confidentiality and consent are incredibly important.

### Threats to physical safety and law enforcement

If you have any concerns as to anyone's physical safety, contact venue security or local law enforcement immediately.

Do not involve law enforcement under any other circumstances except by request of the reporter. Remember that some participants will experience law enforcement as increasing, not diminishing, threats to their safety, so it is very important that they be in control of this choice.

If escalation leads to a harasser being required to leave an event, and they refuse to leave, it may be necessary to involve venue staff, other Stanford employees, or law enforcement as a last resort.

### Addressing reports involving Stanford community members

If a report concerns a Code of Conduct violation and directly involves a Stanford community member (either the reporter or the participant violating the Code of Conduct is Stanford faculty, staff, student, postdoc, etc.), then the report should be brought to the attention of the following Stanford Libraries staff:

- Tom Cramer, AUL for DLSS
- Catalina Rodriguez, Director of HR
- Gary Harris, Associate Director of HR

As indicated above, such reports should be shared *only* if the reporter has granted their consent to do so.

### Recusal process

Conflicts of interest may include relationships of the following nature with either party:

- Close friendships
- Business partnerships
- Romantic relationships
- Family relationships
- Hierarchical academic or business relationships
- Any other significant power relationship
- Significant personal conflict
- Involvement in the incident

If you think the nature of your relationship with either party is such that you would be significantly biased for or against them, or if you would be in a position to retaliate against or receive retaliation from either party depending on the outcome, you should recuse yourself. Additionally, if the nature of your relationship is such that outside people might reasonably perceive a conflict of interest, you should recuse yourself.

It is not necessary to recuse yourself on the basis of having been present at a public violation under discussion, or on the basis of the sort of general friendships and acquaintanceships which many people share in professional spaces.

Recusing yourself means you should stop influencing the decision in any way. Don't participate in the discussion, and don't discuss the decision with others (including other staff), read or write the documentation, etc. If there are email threads, group chats, etc., leave them if possible (and if you haven't recused yourself, don't include people who are recused in these group communications).

### Responding to reports

Send the report immediately to the team of facilitators and project staff listed as contacts for the event using established private communication channels, and/or convene a meeting (physical or virtual) as soon as possible (within 2 hours if during an event, or within 1 business day if not at an event). Do let the alleged harasser know that a complaint has been lodged (reread the language above about confidentiality and consent first). Project staff and facilitators are not in a position to conduct exhaustive investigations, so don't. It may be necessary and prudent to gather some additional information before reaching a decision, however.

At the meeting, discuss:

- What happened?
- Are you doing anything about it?
- If so, who is doing it?
- When will they do it?

Specific sanctions may include but are not limited to:

- warning the harasser to cease their behavior and that any further reports will result in other sanctions
- requiring that the harasser avoid any interaction with, and physical proximity to, the reporter(s) for the remainder of the event
- early termination of a presentation that violates the policy
- not publishing the video or slides of a presentation that violated the policy
- not allowing a speaker who violated the policy to give (further) talks at the event
- immediately ending any event volunteer responsibilities and privileges the harasser holds requiring that the harasser not volunteer for future project events (either indefinitely or for a certain time period)
- requiring that the harasser immediately leave the event and not return
- banning the harasser from future events (either indefinitely or for a certain time period)
- publishing an account of the harassment

Keep in mind that it is never a good idea to require an apology. If a harasser would like to apologize, this may also be a bad idea. Do not include the reporter, the alleged harasser, or anyone with a conflict of interest at this meeting.

If there is no consensus in the group on a response, the coordinators will determine and communicate the course of action.

Violations that have been reported second hand, not by the target of the violation, should be handled on a case by case basis. Keep an eye on those involved in the report and, if need be, approach the affected parties.

### *Communications*

Project staff and facilitators will determine whether private (not widely witnessed) incidents need to be addressed with the community of project participants. Widely witnessed incidents should be addressed to the broader community of project participants.

### *Involved parties*

As soon as possible after the meeting, communicate your decision and any actions you are taking to involved parties.

When meeting with someone accused of harassment, follow the Rule of Two - have two volunteers in the room. Any more than two might be viewed as piling on the person, any less than two is a safety concern.

Remind individuals of the Community Agreements and point out any pertinent sections regarding the nature of the report. The Community Agreements serve to provide a structure for supportive, effective and inclusive collaboration.

### *The broader project community*

First, reread the language above about confidentiality and consent, and consider this section in that light.

- Do respond quickly.
- Do keep individuals on both sides of an incident anonymous. (Potential exceptions: when a harasser is a conference staffer; when the incident was public and high-profile.)
- Do provide a general sense of the nature of the incident.
- Do say what you have done in response to the incident.
- You may briefly note any steps taken by harassers to remedy the situation (e.g. apology, leaving the conference). Don't give them a cookie for it.
- Do provide multiple avenues for community feedback to project staff. This feedback should be private. If you provide only one feedback mechanism, make sure it is accessible to everyone (e.g. email good, in-person conversations bad).

- Do reiterate the project’s values.

Your goal is to be transparent about your process and values while respecting the privacy of individuals involved. Keep it brief and clear. There will probably be upset community members who want to talk. Conference staff should listen to them nonjudgmentally, take notes if needed, thank them for their feedback, and not flip into problem-solving or explaining mode. Apologize as needed; avoid defensiveness.

#### *After events*

If someone's conduct was egregious enough that they should be banned from further participation in the project (e.g. future events or contributions), this needs to be recorded and communicated to the Project Director (Mark Matienzo), Tom Cramer (Associate University Librarian for DLSS), or someone else on the core project team.

#### References

The Community Agreements and Code of Conduct were developed through consultation and adaptation of a number of existing sources, including:

- The Collective Responsibility Code of Conduct and Community Agreement<sup>2</sup>
- The LDCX 2019 Code of Conduct<sup>3</sup>
- The Digital Library Federation Code of Conduct<sup>4</sup>
- The Recurse Center Social Rules<sup>5</sup>
- AORTA’s *Anti-Oppressive Facilitation for Democratic Process: Making Meetings Awesome for Everyone*<sup>6</sup>
- Seeds for Change’s *Group Agreements for Workshops and Meetings*<sup>7</sup>
- Valerie Aurora and Mary Gardiner’s *How to Respond to Code of Conduct Reports*<sup>8</sup>

Response procedures were adapted from the Code4Lib response procedures.<sup>9</sup>

<sup>2</sup> “Code of Conduct and Community Agreement.” *Collective Responsibility: National Forum on Labor Practices for Grant-Funded Digital Positions*, accessed May 3, 2020. <https://laborforum.diglib.org/code-of-conduct-and-community-agreement/>.

<sup>3</sup> “Code of Conduct - LDCX 2019 Conference.” *Stanford University Libraries*, accessed May 3, 2020. <https://library.stanford.edu/projects/ldcx/2019-conference/code-conduct>.

<sup>4</sup> “DLF Code of Conduct.” *Digital Library Federation*, accessed May 3, 2020. <https://www.diglib.org/about/code-of-conduct/>.

<sup>5</sup> “Social rules,” *Recurse Center*, accessed May 3, 2020. <https://www.recurse.com/social-rules>.

<sup>6</sup> AORTA (Anti-Oppression Resource & Training Alliance). “Anti-Oppressive Facilitation for Democratic Process: Making Meetings Awesome for Everyone,” June 2017. [https://aorta.coop/portfolio\\_page/anti-oppressive-facilitation/](https://aorta.coop/portfolio_page/anti-oppressive-facilitation/).

<sup>7</sup> “Group Agreements for workshops and meetings.” *Seeds for Change*, accessed May 3, 2020. <https://www.seedsforchange.org.uk/groupagree>.

<sup>8</sup> Valerie Aurora and Mary Gardiner, *How to Respond to Code of Conduct Reports*. Frameshift Consulting LLC, 2019. <https://files.frameshiftconsulting.com/books/cocguide.pdf>

<sup>9</sup> “Procedures for reporting and responding to violations of Code of Conduct.” *Code4Lib Code of Conduct*, January 15, 2020. <https://github.com/code4lib/code-of-conduct/blob/master/procedures.md>



# Lighting the Way Forum Playbook

A Resource for Facilitators, Notetakers, and Vendors

## Overview

### Goals

The Lighting the Way Forum focuses on information sharing and collaborative problem solving around improving how user-facing systems support discovery and delivery for archives and special collections. The goals for the Forum are:

- **To allow participants to visualize, map, and build connections** – between one another, their work, the systems they rely on, and the communities they serve
- **To organize around shared opportunities and challenges**, identified by participants during group activities
- **To provide a platform for engagement with the project**, leading to participation in other project activities (e.g. attending the working meeting or contributing to written products like the integration handbook)

These goals align with the four primary project goals:

- Map the ecosystem supporting archival discovery and delivery.
- Develop both conceptual and actionable recommendations for systems integration for technical, ethical, and practical concerns.
- Build a shared understanding between workers in fields like archives, library, and technology undertaking this work.
- Activate a diverse group of project participants.

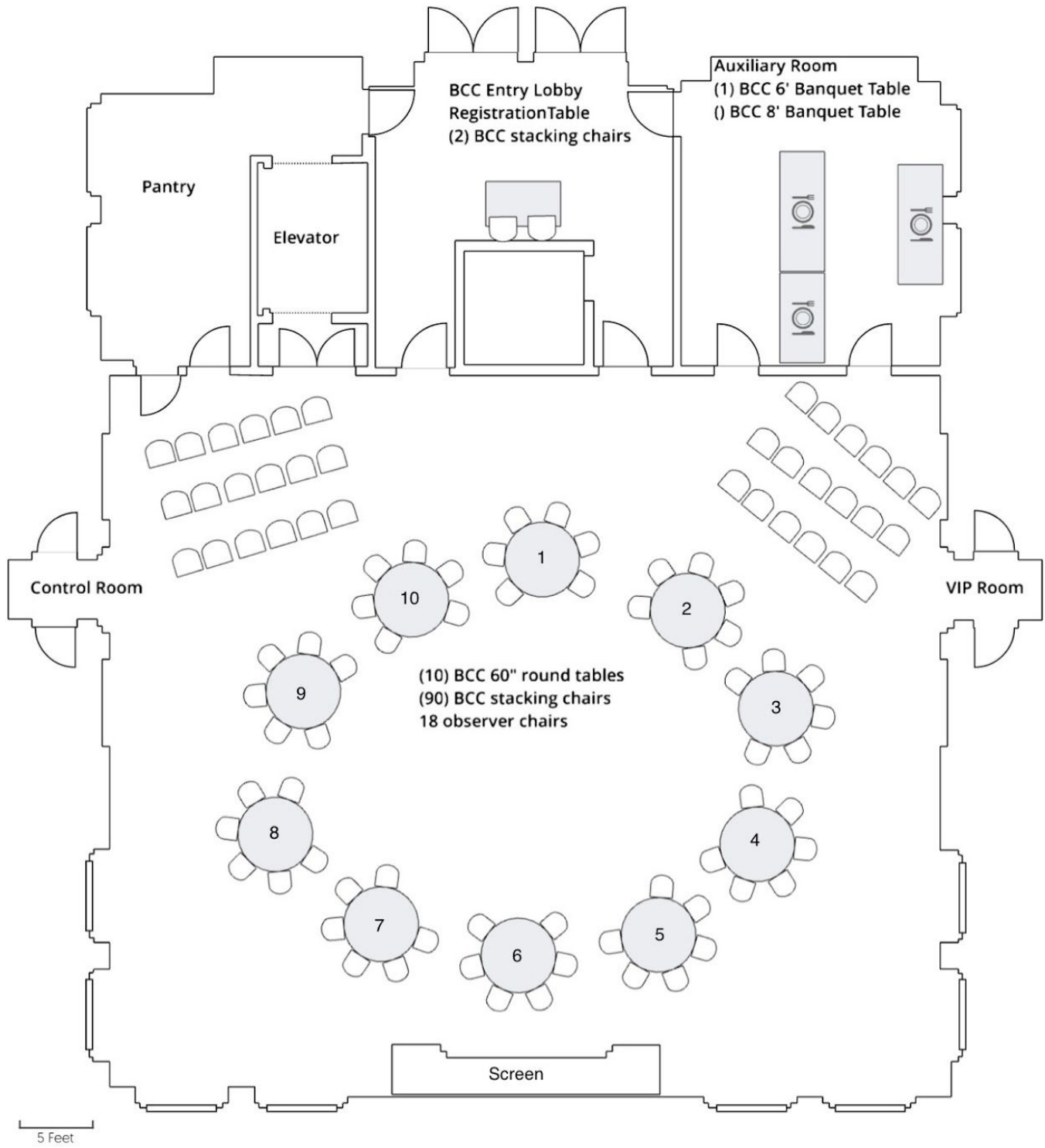
### Design

The Forum uses a mix of plenary presentations and facilitated breakout activities to focus on addressing the goals listed above, following the “divergent - emergent - convergent” model described in [Macanuso, Brown, and Gray's Gamestorming](#) and [widely used in design ideation sessions](#). Day 1 focuses on divergent activities (set the stage, develop themes, etc.); day 2 focuses on emergent activities (examine, explore, and experiment); and day 3 focuses on convergent activities (conclusions, decisions, action).

### Schedule overview

The [draft schedule](#) has the forum running across two and a half days, with meals and breaks in blue, facilitated activities in red, presentations in green, facilitator announcements in yellow, and debrief sessions for facilitators in purple. The [public agenda](#) shows the schedule for participants.

# Room layout



## Facilitators and notetakers

Facilitators and notetakers are essential to the success of the Forum. We want to make sure that facilitators and notetakers understand their responsibility, and encourage them to review the following resources:

- [Community Agreements and Code of Conduct](#) (read this first!)
- [AORTA Collective Anti-Oppressive Facilitation Guide](#) (read this second!)
- [Procedures for Responding to Violations of the Code of Conduct and Community Agreements](#)

Facilitators help keep the conversation going, determine how to help people stay engaged, help answer questions about specific activities, watch and respond to difficult social dynamics, and make sure everyone can participate and be heard. The Forum relies on structured activities that allow people to engage with one another in small groups, at 7-8 person tables, 12-16 person large groups, and across the room. Facilitators at the table level can participate in exercises, but must stay attuned to their role and not dominate conversations or allow them to be derailed.

Notetakers help document the Forum and its activities to help our project achieve its goals, and to help make space for relationship-building among the participants. We may ask for notetakers at the end of a given exercise during group discussion to identify the most promising outcomes, and sometimes we may need it during an exercise to help with reporting out to the larger room.

Brief descriptions of key roles follow:

- **Primary facilitator:** a facilitator responsible for the overall structure, timing, flow of a given day
- **Activity facilitator:** a facilitator responsible for a specific activity or section of the program; acts as timekeeper or delegates timekeeping to a floater facilitator
- **Floater facilitator:** a facilitator that helps support the activity facilitator during a given activity while the activity is underway; assists activity facilitator with timekeeping
- **Table facilitator:** a facilitator that helps a given table/group stay on track during activities
- **Notetaker:** someone to record the output of activities using Google Docs or other techniques as needed or preferred, either at the level of an individual table or in room-wide report-outs
- **Livestream monitor/moderator:** responsible for checking that the livestreaming function is working, and watching for any questions from remote participants.

## Day 1

### Set up

- Room should be set up with 10 tables of 7 chairs each, plus 16-20 additional chairs in the back. Each table should have the following: (confirm stock each day)
  - 1 Post-It easel pad
  - 10+ pens

- 10+ markers (various colors; colors not significant)
- 15+ 5x8" index cards
- 1 roll of painter's tape
- 7 pads of 3x3" Post-It notes per table (various colors; colors significant)
- 1 or 2 printed copies of the Forum Playbook (this document)
- Ensure an additional supply is available of the following:
  - A few extra Post-It easel pads
  - Pens
  - Markers
  - Index cards
  - Post-It notes
  - Dot stickers
  - 1 ream printer paper
  - 24-pack bottled water
- Ensure power (surge protector?) is available at each table and at the podium

## Registration

- Participants should receive the following:
  - Name badge/lanyard
  - Folder with handouts
    - Schedule
    - Directions
    - List of participants (no contact information)
    - Community Agreements and Code of Conduct
    - Stanford Libraries swag (stickers, laptop camera cover, etc.)
- If a participant is listed as having specific food needs (restrictions/allergies), confirm with them.
- People can sit with whomever they'd like, although they're encouraged to sit with people they don't know.

## Breakfast / Getting to know one another

### Script:

- We encourage you to introduce yourself to everyone at your table. Let the conversation flow naturally or feel free to choose to answer any of these questions.
- For people who like icebreakers:
  - What's your favorite snack?
  - How do you celebrate a job well done?
  - What was your favorite vacation you've ever taken and why?
- For people who don't like icebreaker:
  - What brought you to the Forum?
  - What motivates you?
  - What do you think is the most rewarding outcome we could achieve for the Forum?

## Pre-Activity: Trading Cards (15 minutes)

**Lead(s):** Individual table facilitators

**Activity Type:** Divergent

**Goal(s):** Get participants to talk to one another

**Reference material:** [Trading Cards - Gamestorming](#)

**Supplies:** 1 index card and 1 marker/pen per person

**Outcomes:** Artifact to generate discussion.

**Script:**

- We see that you are starting to have conversations with one another and want to give you another way to get to know the participants at your table.
- We're going to have each of you make a "trading card" for yourself. Take a blank index card and a marker or pen. At the top, write your name, and below that draw a picture that represents you. Save a couple lines at the bottom. On one line, write a few words that describe what kind of work you do. Below that, write a few words that describe something you're excited about in terms of the Forum. We'll take five minutes for you to draw your trading card.
- **(After 5 minutes)** OK - you all should have your trading cards now. Now, we'll spend five minutes trading cards around your table. When someone hands you a card, hold onto it for a moment, and think of a question you might ask that person, and write it on the back of the card. After you've done that, you can trade your card to someone else at the table. You can hold onto at most one card if you want to follow up on a specific question that either you or someone else wrote.
- **(After 5 minutes)** Now, you should all have another person's card with a question or two on the back. At each table, you can ask the person who's card you're holding the question on the back, and they can either answer or pass. We'll take only three minutes to do this, so make your answers fast!

## Welcome, Logistics, Announcements, and Invited Talks (3 hours)

### Activity 1 - Mad Tea (60 minutes)

**Activity Type:** Divergent

**Goal(s):** Get participants to talk to one another; articulate shared concerns; build energy and creativity

**Reference material:** [Mad Tea - Liberating Structures](#); [1-2-4-All - Liberating Structures](#)

**Supplies:** Bell or other noisemaker for activity facilitator; paper for idea generation; Google Docs for notes

**Outcomes:** Idea sharing/reflection using strategy worksheet; notes doc on opportunities

**Script:**

- Our first activity invites you to finish a list of open-ended sentences that relate to shaping the direction about how we think about and discuss archival discovery and delivery. We'll show you questions on the screen and read them off to you.
- We'll form two concentric circles. For those of you on the inside of the tables towards the center of the room, face the outside of the room; for those on the outside of the tables, face the inside of the room. If you're able and willing to stand, we recommend doing so.

- You will start by pairing someone directly across from you. One of you should invite the first person to complete the sentence. When you hear the sound of [whatever] only once, or see me raise [whatever], the first person invites the other person should complete the sentence. When you hear the sound of [whatever] twice, or see me raise [whatever], rotate two people to your right if you are willing to move.
- **[Questions - use list from [LS Mad Tea](#); add to a slide deck]**
  - **[Show first question]** And we are going to start with this as the first question. **[read question]**
  - **[Make sound/signal; after 45 seconds, make sound/signal again only once]** OK, time to rotate two people to your right.
  - **[After 45 seconds; Make sound/signal twice and show/read next question]**
  - **[Repeat second and third until done]**
- Now that you've gotten a chance to talk to a lot more people, let's have you return to your original seat if you can find it. You're now invited to reflect on your responses and what you heard. Please spend ten minutes answering the following questions: **[Present these on a slide]**
  - **1. What is the deepest need for my / our work?**
  - **2. What is happening around me / us that demands creative adaptation?**
  - **3. Where am I / are we starting, honestly?**
  - **4. Given my / our purpose, what seems possible now?**
  - **5. What paradoxical challenges must I / we face down to make progress?**
  - **6. How am I / are we acting our way forward toward the future?**
- **[After 10 minutes]** Now that you've reflected on these questions, spend two in silent reflection answering the following question. **What are the biggest opportunities we have in terms of improving archival discovery and delivery?**
- **[After 2 minutes]** I invite you to now spend five minutes reflecting with one or two people at your table about your answers to this question, and identifying other opportunities. Make sure someone is a note taker within your group.
- **[After 5 minutes]** Now that you've discussed in groups of two or three, I encourage you to share your answers and generating additional ideas at your table. Let's spend five minutes doing that. Make sure you have a note taker who is listing all of the ideas.
- **[After 5 minutes]** So by now, you should have discussed at opportunities for improving archival discovery and delivery at your table. Let's share around the room - name one opportunity and one challenge that stuck out in your discussion. Let's keep the discussion brief, perhaps 90 seconds most per table. **[Ensure we have a note taker for the room]**

## Break (30 minutes)

**Activity type:** Break

**Outline:**

- Remind people that we're starting promptly at 3:00

## Activity 2A - Speedboat (45 minutes)

**Activity Type:** Divergent

**Goal(s):** Identify drivers/hindrances; scope out problem space; expand previous exercise & application data

**Reference material:** [Speedboat - Innovation Games](#); [Speed Boat - Gamestorming](#)

**Supplies:** 1 easel pad and post-its/markers per table; notes document for group sharing

**Outcomes:** Data to support emergent exercises (keep notes/transcribe); clearer set of positive/negative perspectives on problem space

**Script:**

- In this next activity, we're going to focus on strengths and challenges by using the metaphor of a boat. At each table, you should have an easel pad and some markers. Start by drawing a boat on the easel pad. This boat is the good ship Archival Discovery and Delivery. At your table, each of you should start adding sails that speed the boat up — representing strengths or things that provide us forward momentum — or anchors that slow it down (challenges, obstacles, and the like). Spend 15 minutes doing this and taking turns adding ideas, but keep discussion at this point minimal. Use post-it notes to add sails and anchors to make it easier.
- After 15 minutes, discuss all the sails and anchors your table added as a group. Do any of them seem more significant than others? If the discussion helps you identify more sails or anchors, you can add them. Spend 15 minutes on that part. After that, we'll share with the full group for 15 minutes. Ready to start?
- **[After 15 minutes]** By now your tables should have a boat with some anchors and sails. Begin shifting to the group.
- **[After 15 minutes]** OK, let's now share across each group. **[Ensure notetakers are documenting this; this will help feed into TRIZ on day 2]**
  - **Suggested questions:**
    - Do any of these anchors and sails feel directly oppositional?
    - What stands out to you about these ideas?

## Activity 2B - Low-Tech Social Networking (45 minutes)

**Activity Type:** Divergent

**Goal(s):** Identify connections between people

**Reference material:** [Low-Tech Social Network - Gamestorming](#)

**Supplies:** 1 easel pad, 5x8" index cards, painter's tape per table; butcher paper?

**Outcomes:** Data to support emergent exercises (keep notes/transcribe); clearer set of positive/negative perspectives on problem space

**Script:**

- As a group, we are going to build the social network that is in the room right now. We're going to use this wall to do it. But first, we need to create the most fundamental elements of the network: who you are. If you're able to get your trading card from another person at your table, do so, or create a new one with a drawing of your avatar, your name at the top, and a few words or "tags" at the bottom that describe who you are, what you do, or what you're interested in. We'll give you two minutes to do that now.
- **[After 2 minutes]** Now that you have your new avatar, take a blank sheet from your easel pad. "Upload" your profiles to the social network by taping your cards to the sheet. Once you've done that, starting at your tables, start with the people you know and draw lines to make the connections. You can ask people questions to see how you're connected with people that you don't already know well. Label the lines if you can, like "friends with," "works with," "went to school with," etc." We'll spend ten minutes doing that.

- **[After 10 minutes]** Let's do this again with two tables - meet and combine your social networks, and draw the connections. We'll do this for ten minutes.
- **[After 10 minutes]** Now, let's take all the sheets and put them on this wall. Spend the next 15 minutes looking at the network, and reflecting on who else you happen to be connected to on the network. We're not going to draw lines at this point because we don't want the markers to bleed through the wall. As you look at the network, ask yourself which connections you find the most noticeable or striking. We'll do this for 15 minutes.
- **[After 15 minutes]** Now that you've had some time to reflect, let's take a few minutes to reflect on what you noted about the connections. What stood out to you the most?

## Retrospective and Prep for Day 2 (30 minutes)

**Activity Type:** Divergent

**Goal(s):** Feedback

**Reference material:** [The 4L's: A Retrospective Technique](#);

**Supplies:** Google Docs for notes, post-its and pens

**Outcomes:** Information to check on course correction

**Script:**

- Now that we've concluded the last exercise for the day, we're going to spend some time reflecting on today. As a reminder, we started the day with a trading card exercise, had a series of presentations, took a break for lunch, and had three activities in the afternoon. The first was Mad Tea, which got you talking to one another around the room and built in time for reflection. The second was the Speedboat, where we looked at strengths we have and challenges we face in terms of archival discovery and delivery. Finally, started building our Low-Tech Social Network to make connections to one another clearer. The focus today was on a divergent approach to get you to articulate ideas and new possibilities.
- To help you reflect, we're going to use a technique called the 4Ls retrospective. The 4Ls are **Liked, Learned, Lacked, and Longed For**. For liked, think about what you enjoyed or what went well - it could be anything from the content, the tools, to conversations you've had with people. For "Learned," think about something that you learned today - any new discoveries, points of interest, or highlights. For "Lacked," think about what seemed to be missing today. Was anything unclear? Did you need something to make your participation go more smoothly? For "Longed For," try to think of something that you wish existed or was possible that would ensure that the Forum would be successful. Write each of your items on a post-it note, and remember which of the 4Ls each post-it is associated with. We'll give you five minutes in individual reflection.
- **[After 5 minutes]** At your tables, have one person draw two lines on a sheet of the easel pad to divide it into four quadrants. Label each quadrant with one of the 4Ls. Share your responses with the 4Ls with one another, and place them on the sheet of easel pad. Discuss with one another, and feel free to add any others should they come up. We'll spend 10 minutes doing that. **[Ensure a notetaker transcribes any significant points in discussion]**
- **[After 10 minutes]** OK, let's place the sheets on the wall, and we'll go around each group. You only have about a minute each to walk us through some of the 4Ls that stuck out in your group. **[Ensure a notetaker transcribes these]**
- Thanks for your feedback!



## Facilitator debrief (15 minutes)

**Activity type:** Debrief

**Outline:**

- What do we need to start/stop/continue doing?
- What went particularly well, or where did participants struggle?
- Were there any concerns about potential Code of Conduct or Community Agreements violations?
- Do we need to change plans for tomorrow?

## Day 2

### Set up

- Room should be set up with 10 tables of 7 chairs each, plus 16-20 additional chairs in the back. Each table should have the following: (confirm stock each day)
  - 1 Post-It easel pad
  - 10+ pens
  - 10+ markers (various colors; colors not significant)
  - 15+ 5x8" index cards
  - 1 roll of painter's tape
  - 7 pads of 3x3" Post-It notes per table (various colors; colors significant)
  - 1 or 2 printed copies of the Forum Playbook (this document)
- Ensure an additional supply is available of the following:
  - A few extra Post-It easel pads
  - Pens
  - Markers
  - Index cards
  - Post-It notes
  - Dot stickers
  - 1 ream printer paper
  - 24-pack bottled water
- Ensure power (surge protector?) is available at each table

### Breakfast (60 minutes)

- Encourage people to sit at different tables/with different people than in Day 1

### Recap of Day 1/What's Today? (15 minutes)

**Activity type:** Logistics

**Goal(s):** Give participants important information about the event, and refresh participants on what we've done yesterday.

**Script:**

- Welcome to day two of the forum. To start, let's see if there are any announcements.
- Let's start by recapping what we did yesterday. We started with breakfast and sharing Trading Cards as a getting to know you exercise, and moved into a series of presentations by the project team and from some of your fellow participants around four themes: the evolving systems ecosystem, networks and the big picture, cultural/legal/ethical concerns, and impacts on public services and outreach. We took a break for lunch, and moved into Mad Tea, a more in-depth getting to know you exercise that focused on getting you to talk about potential opportunities related to archival discovery and delivery. We then did the Speedboat activity to identify the things that move us forward and the things that slow us down, and rounded out the day with the Low-Tech Social Network to map connections to one another and a retrospective to talk about how the day went. Yesterday marked the start of the divergent phase of the forum, where we encouraged you to start exploring new possibilities. Does anyone have any questions or comments about yesterday?
- So, what are we going to be doing today? Today, we're focusing on the emergent phase, where we're undertaking deeper exploration of these possibilities, and to allow the unexpected and surprising to bubble up to the surface. We'll start with the Trading Cards again as a getting to know you exercise at your new tables, and then move into a Context Map activity that allows us to see some of the external factors, trends, and forces that impact our work. We'll take a short break, and then move into an activity called TRIZ, which will help us imagine the worst possible results or outcomes, and see how our own counterproductive behaviors play into that. We'll take a break for lunch, and then reorganize in groups based roughly on job function and undertake work to generate and organize potential ideas into possible themes. We'll have another break, and close out the day with two activities - one focused on potential actions that you can take (15% Solutions), and an activity where we'll generate ideas individually and share them across the room to see which may be the most promising. At the end of the day, we'll take time to review what we've done today and have another retrospective.
- Are there any questions about what we're up to today?

## Activity 3A - Trading Cards (15 minutes)

**Activity Type:** Divergent

**Goal(s):** Get participants to talk to one another

**Reference material:** [Trading Cards - Gamestorming](#)

**Supplies:** 1 index card and 1 marker/pen per person

**Outcomes:** Artifact to generate discussion.

**Script:**

- Because we are sitting at new tables today, we want to give you an opportunity to get to know your new tablemates and warm-up for the day.
- We're going to have each of you make a "trading card" for yourself. Take a blank index card and a marker or pen. At the top, write your name, and below that draw a picture that represents you. Save a couple lines at the bottom. On one line, write a few words that describe what kind of work you do. Below that, write a few words that describe something you're excited about in terms of the Forum. We'll take five minutes for you to draw your trading card.

- **(After 5 minutes)** OK - you all should have your trading cards now. Now, we'll spend five minutes trading cards around your table. When someone hands you a card, hold onto it for a moment, and think of a question you might ask that person, and write it on the back of the card. After you've done that, you can trade your card to someone else at the table. You can hold onto at most one card if you want to follow up on a specific question that either you or someone else wrote.
- **(After 5 minutes)** Now, you should all have another person's card with a question or two on the back. At each table, you can ask the person who's card you're holding the question on the back, and they can either answer or pass. We'll take only three minutes to do this, so make your answers fast!

## Activity 3B - Context Map (75 minutes)

**Activity Type:** Divergent → Emergent

**Goal(s):** Give participants an opportunity to map out the context they are working in.

**Reference material:** [Context Map - Gamestorming](#)

**Supplies:** Six sheets of paper from easel pad, markers.

**Outcomes:** Data to support emergent exercises, including current state of community and forecasting trends.

**Script:**

- With this exercise, we want to explore the greater context we currently operate in, and gain a better understanding of the factors that influence archival discovery and delivery.
- **[Creating the sheets and drawing should take approximately 5 minutes]** First, we need six pieces of paper from the easel pad. Arrange the paper into a two row, three column format. In the top middle piece of paper, draw a representation of archival discovery and delivery- it can be as simple as an image of a folder or a finding aid- don't overthink it! On that same piece of paper, above and to the left of what you've drawn, write the words "POLITICAL CLIMATE" and to the right, write the words "ECONOMIC CLIMATE".
- On the top left sheet of paper, draw several large/thick arrows pointing to the middle sheet. Label this sheet "TRENDS" but leave a blank space before the word so you can add a qualifier later. On the top right sheet of paper, draw the same arrows, again pointing at the middle sheet. Label this sheet in the same way you labeled the other one.
- On the bottom-left sheet, draw large arrows pointing up at the top-row middle sheet, and label this sheet with "TECHNOLOGY FACTORS".
- On the bottom-middle sheet, draw an image representing your stakeholders/users, and label the sheet "STAKEHOLDER/USER NEEDS."
- On the bottom-right sheet, draw a thundercloud and label this sheet "UNCERTAINTIES".
- **[Spend no more than 10 minutes brainstorming and filling out each sheet]** To begin filling out the context map, choose any sheet (aside from the two labeled TRENDS), and begin discussing with your group. Identify a volunteer to populate the sheet with the relevant discussion from the group. Repeat this for the other two non-TRENDS sheets.
- When it comes time to do the "TRENDS" sheets, discuss as a group how you want to qualify/label the trends. Once this has been decided, discuss the trends and populate the sheet with the relevant discussion from the group.
- **[Spend 10 minutes discussing the overall map]** Congratulations, you have made a context map! Discuss the overall findings with the group and ask for observations. What sticks out to you? Is there something new you learned from this exercise about the context you/your colleagues work in?  
**[Ensure there are group note takers documenting the observations]**

## Break (15 minutes)

**Activity type:** Break

**Outline:**

- Remind people that we're starting promptly at 11:00

## Activity 4 - TRIZ (60 minutes)

**Activity Type:** Emergent

**Goal(s):** Identify negative behaviors and ways in which we participate in them

**Reference material:** [TRIZ - Liberating Structures](#)

**Supplies:** Google docs for notes and recap of previously identified anchors. paper for individual notes, easel for group notes

**Outcomes:**

**Script:**

- We spent some time yesterday in our Speedboat exercise talking about “sails” and “anchors”, or strengths and limitations of archival discovery and delivery. We’ve also just done some mapping of those factors. In this next exercise we want to dig into the limiting factors a bit more in a way that we hope is fun and engages all of our inner supervillains.
- First, let’s remind ourselves of some of the anchors we identified yesterday. **[Ask for ideas from the audience, which are then added to a list that is visible to all. Have a list gathered after Speedboat to make sure nothing is missed]**
- **[After 5 minutes]** So, given this list of anchors or negative attributes, what are some ways we could maximize these barriers? **[Provide an example or two]** Take fifteen minutes in your groups to brainstorm ways to be evil, using your easels to jot down ideas. Then see if you can come up with a top five most effective ways to achieve unwanted results.
- **[After 15 minutes]** Now, let’s take some time to go around the room and have each group share their top five ways to maximize barriers to archival discovery and delivery. You may need to specify which barrier a particular behavior is associated with.
- **[After 10 minutes]** Now, take five minutes to reflect on the list you created together, and then make a second list of all that you are currently doing that resembles in some way one or more items on that list. These could be things that you personally do, or things that happen at your institution or within communities with which you’re familiar.
- **[After 5 minutes]** I invite you to now spend five minutes reflecting with one or two people at your table about your respective lists, seeing where they overlap, and identifying other things that may come up in conversation. Make sure someone is a note taker within your group.
- **[After 5 minutes]** Now that you’ve discussed in groups of two or three, I encourage you to share your answers and generate additional connections between unwanted outcomes and existing behaviors with everyone at your table. Let’s spend five minutes doing that. Make sure you have a note taker who is listing all of the ideas.
- **[After 5 minutes]** So by now, you should have discussed some behaviors which lead to bad things. Let’s share around the room - name one unwanted result and supporting behavior that stuck out in your discussion. Let’s keep the discussion brief, perhaps 90 seconds most per table. **[Ensure someone is notetaking for the room]**

## Lunch (60 minutes)

**Activity type:** Break

**Outline:**

- Remind people that we're starting promptly at 1:00
- Let them know that they are moving into groups after lunch; have slide listing groups on screen
- Encourage people to go outside if the weather is nice

## Activity 5 - Affinity Map (90 minutes)

**Activity Type:** Emergent

**Goal(s):** Develop and reflect on patterns and themes based on institutional roles, generate ideas for next steps

**Reference material:** [Affinity Map - Gamestorming](#)

**Supplies:** sticky notes, easel paper, pens

**Outcomes:** Participants will develop categories of action to take

**Script:**

- **[Have participants sit with affinity groups; present affinity groups on slide before transition]**  
Now that you are sitting with your affinity group, we will begin to brainstorm answers to address archival delivery and discovery, based on our institutional/functional roles.
- Take a large piece of easel paper and write the following questions:
  - **What changes must take place to improve and enhance archival delivery and discovery?**
  - **What are steps we can take to improve archival delivery and discovery?**
- Next, spend 10 minutes individually brainstorming all the possible solutions, large and small. Each participant should try to develop 15-20 post-it notes with ideas.
- **[After 10 minutes]** Now, one volunteer can collect all the post-its and display them on a flat surface.
- Working as a group over the next 30 minutes, try to organize the post-its into clusters or columns based on their similarities. You may want to do this as a whole group, or delegate one person at a time to group the post-its, with the following person modifying as they see fit. Leave redundant post-it notes, as it indicates that multiple people are thinking the same thing. You may also want to create a parking lot for ideas that do not appear to fall into any of the emerging categories. At this point in the exercise, you are not trying to label the clusters, only trying to group like-ideas together.
- **[After 30 minutes]** Now that you have consensus on your clusters, work together to create labels or categories of action that your clusters fall under. Don't spend too long attempting to label your clusters, and if there is disagreement between two labels, write them both for the time being. Spend 15-20 minutes labeling.
- **[After 15-20 minutes]** Reflect on the categories as a group. What is surprising to you? Is there anything unexpected about how the ideas are grouped and labeled? Is there any disagreement within the group?

## Break (30 minutes)

**Activity type:** Break

**Outline:**

- Remind people that we're starting promptly at 3:00

## Activity 6A - 15% Solutions (30 minutes)

**Activity Type:** Emergent

**Goal(s):** To identify small solutions that attendees currently have the power, resources, and discretion to take; to transition attendees to considering how to address archival discovery and access challenges in light of trends and context identified in previous activities

**Reference material:** <http://www.liberatingstructures.com/7-15-solutions/>

**Supplies:** index cards or paper, pens

**Outcomes:** Data to support next exercise; attendees will also be better prepped to consider collective solutions by workshoping their individual 15% solutions

**Script:**

- So far today we have considered the contextual factors affecting discovery and access for archival materials, thought about how our own negative behaviors can create and reinforce challenges, and reflected on these themes with peer affinity groups to generate ideas for next steps..
- To keep us thinking positively and to continue to generate momentum along our emergent trajectory, we're now going to use an activity called "15% solutions." This activity is intended to get us all thinking about the small things we currently have in our individual power to do. The question we're going to be asking ourselves for the next 30 minutes is "What is our 15 percent? Where do we individually have discretion and freedom to act? And what can you personally do without more resources or authority?"
- Take five minutes, by yourself, and try to come up with a list of 15% solutions using the paper/notecards and pens on the table.
- **[After 5 minutes]** Now each person should share their top ideas with your half-table of 3 or 4 people. Assign a notetaker or take turns entering notes into a Google Doc. Each individual gets 5 minutes total to be the center of attention. Table mates, use this time to listen to the speaker, and not to provide advice or critique, but to ask clarifying questions, and to offer encouragement for folks to move forward.
- **[After 20 minutes]** So now, you've come up with some 15% solutions on your own and gotten some feedback from your table mates to help make those smaller solutions more effective. We're now going to try another activity that's focused on thinking bigger, and generating bolder solutions.

## Activity 6B - 25/10 Crowdsourcing (50 minutes)

**Activity Type:** Emergent

**Goal(s):** To share ideas across attendees; to achieve rough consensus on the most promising ideas

**Reference material:** <http://www.liberatingstructures.com/12-2510-crowd-sourcing/>

**Supplies:** index cards and pens at tables; google docs/laptop/screen (to record and display 10-12 most promising ideas); bell or alert of some kind (we can also use music during the mill as pass phase)

**Outcomes:** List of 10-12 most promising ideas as voted by attendees

**Script:**

- Our next activity is called 25/10 Crowdsourcing. This activity asks us to consider "What big idea would you recommend to improve archival discovery and access if you were ten times bolder? And what first

step would you take to get started?" If you like, this activity can directly reference the 15% solution you were just working on, but it doesn't have to.

- **[3 minutes]** So this is the process. First, everyone will take a single index card and write one big idea and a first step. You'll have 5 minutes. Then people will get up, mill around, and pass cards from person to person. No one reads the cards, they just pass. This part is called "Mill and Pass." When the bell rings again, people stop passing cards and read the card in their hands. Feel free to discuss it with the person who handed it to you. You'll have about 2 minutes to read the card, discuss it, and then rate the idea and first step with a score from 1 to 5 based on how strong and promising you think the idea is (1 is not your cup of coffee and 5 is sends you over the moon), writing the score on the back of the card. This part is called "Read and Score." When the bell rings, cards are passed around for another round of "Mill and Pass" until the bell rings and the "Read and Score" scoring cycle repeats. This is done for a total of five scoring rounds. At the end of cycle five, participants add the five scores on the back of the last card they are holding. Finally, the ideas with the top ten scores are identified and shared with the whole group. So five round of five gives a max score of 25 for each card, and at the end we see which 10 ideas and first steps scored the highest. 25-10. Everyone got it? Any questions? Great.
- **[2 minutes]** (Optional brief demonstration on writing idea/step, milling and passing, reading and rating, milling and passing).
- **[5 minutes]** So let's start. Take 5 minutes to write a bold idea and first step on your index card.
- **[3 minutes]** Ok everyone, time to mill and pass. Remember, no reading. Just milling and passing, milling and passing. [Ring Bell] Great, now time to read and score. Read the card in your hand, and write a number on the back based on how you wonderful you think it is. 1 is lowest, 5 is highest. 10 more seconds. Great. [Ring bell].
- **[3 minutes]** Now mill and pass again. [Ring bell]. Time to read and score again. [Ring bell]
- **[3 minutes]** Now mill and pass again. [Ring bell]. Time to read and score again. [Ring bell]
- **[3 minutes]** Now mill and pass again. [Ring bell]. Time to read and score again. [Ring bell]
- **[3 minutes]** Final milling and passing [Ring bell]. Ok, this is your last read and score opportunity. [Ring bell].
- Congratulations, everyone. We're done reading and scoring. I saw some excellent milling and passing as well. Everyone can sit if you'd like. Take the card your holding with you.
- **[2 minute]** Now add up the scores on the back on your card, and write that number down on the front of the card. If you have more or less than five ratings for some reason, calculate the average of the scores and multiply that by 5. Maths!
- **[10 Minutes]** "Who has a 25?" etc. [Invite each participant, if any, holding a card scored 25 to read out the idea and action step. Continue with "Who has a 24?," "Who has a 23".... Have participants tape these to a wall, with the highest scores in the left most column. Stop when the top 10 ideas have been identified and shared.] Activity supporter should type these ideas and first steps into a shared google doc on the screen.
- **[10 minutes]** Let's look more closely at these ideas and first steps. What do we think about the top ideas? Do you notice any patterns? How could the ideas or steps be even more clear or compelling?
- **[3 minutes]** (optional) What caught your attention about 25/10?

## Retrospective and Prep for Day 3 (30 minutes)

**Activity Type:** Emergent

**Goal(s):** Feedback

**Reference material:** [The 4L's: A Retrospective Technique](#);

**Supplies:** Google Docs for notes, post-its and pens

**Outcomes:** Information to check on course correction

**Script:**

- Now that we've concluded the last exercise for the day, we're going to spend some time reflecting on today like we did yesterday. As a reminder, we started the day with a trading card exercise, and then moved into a context map to present the state of play in the field. We then used TRIZ to identify counterproductive behaviors. We took a break for lunch, and then moved into the Affinity Map to group and sort ideas. We took a break, and then used 15% Solutions to identify where we each have power to take action, and used 25/10 Crowdsourcing to share and refine our ideas. The focus today was on an emergent approach, allowing us to explore possibilities.
- To help you reflect, we're going to use a technique called the 4Ls retrospective. The 4Ls are **Liked, Learned, Lacked, and Longed For**. For liked, think about what you enjoyed or what went well - it could be anything from the content, the tools, to conversations you've had with people. For "Learned," think about something that you learned today - any new discoveries, points of interest, or highlights. For "Lacked," think about what seemed to be missing today. Was anything unclear? Did you need something to make your participation go more smoothly? For "Longed For," try to think of something that you wish existed or was possible that would ensure that the Forum would be successful. Write each of your items on a post-it note, and remember which of the 4Ls each post-it is associated with. We'll give you five minutes in individual reflection.
- **[After 5 minutes]** At your tables, have one person draw two lines on a sheet of the easel pad to divide it into four quadrants. Label each quadrant with one of the 4Ls. Share your responses with the 4Ls with one another, and place them on the sheet of easel pad. Discuss with one another, and feel free to add any others should they come up. We'll spend 10 minutes doing that.
- **[After 10 minutes]** OK, let's place the sheets on the wall, and we'll go around each group. You only have about a minute each to walk us through some of the 4Ls that stuck out in your group.

## Facilitator debrief (15 minutes)

**Activity type:** Debrief

**Outline:**

- What do we need to start/stop/continue doing?
- What went particularly well, or where did participants struggle?
- Were there any concerns about potential Code of Conduct or Community Agreements violations?
- Do we need to change plans for tomorrow?

## Day 3

### Set up

- Room should be set up with 10 tables of 7 chairs each, plus 16-20 additional chairs in the back. Each table should have the following: (confirm stock each day)
  - 1 Post-It easel pad



- 10+ pens
- 10+ markers (various colors; colors not significant)
- 15+ 5x8" index cards
- 1 roll of painter's tape
- 7 pads of 3x3" Post-It notes per table (various colors; colors significant)
- 1 or 2 printed copies of the Forum Playbook (this document)
- Ensure an additional supply is available of the following:
  - A few extra Post-It easel pads
  - Pens
  - Markers
  - Index cards
  - Post-It notes
  - Dot stickers
  - 1 ream printer paper
  - 24-pack bottled water
- Ensure power (surge protector?) is available at each table

## Breakfast (60 minutes)

- Encourage people to sit at different tables/with different people than in Day 2

## Recap of Day 2/What's Today?/Logistics (15 minutes)

**Activity type:** Logistics

**Goal(s):** Give participants important information about the event, and refresh participants on what we've done yesterday.

**Script:**

- Today, we shift from the emergent phase into the convergent phase, and move from idea generation to determine how we want to take action. We'll first undertake a social network webbing exercise to help us understand how work around archival discovery and delivery happens. Then we'll reflect on some of our past idea generation activities, and determine specific actions that we're willing to commit to as individuals, and get feedback from participants who may be interested in them or willing to commit time to make them happen. Finally, we'll close out with a retrospective, and talk about what's next for the project and the outcomes that we expect.

## Activity 7 - Social Network Webbing (60 minutes)

**Activity Type:** Convergent

**Goal(s):** Articulate connections between individuals/roles at the forum and start to identify individuals/roles who might be missing

**Reference material:** [Social Network Webbing - Liberating Structures](#)

**Supplies:** Different colored post its, paper on easels, tape, legend for roles (from affinity mapping) mapped to post-it color

**Outcomes:**

### Script:

- We're going to try to understand better how work happens in and among networks of people involved in archival discovery and delivery. This is similar to the exercise that we did at the beginning of this meeting, but this time we'll work on it together as a group. To help us understand how different roles are connected, we're going to use a particular color of Post-it for each of the roles we used for an earlier exercise.
- First, each table should take a blank sheet of paper from the easel pad. Then, everyone at the table should clearly print your name on a Post-it that best matches the color of the role in which you identify. Put the Post-its in a group in the center of the paper. Let's take five minutes and all do that.
- **[After 5 minutes]** Now, ask yourself who else you know who is active in this work. As you think of names (or roles), write them on another Post-it, again using the appropriate color. Then, arrange the Post-its on the paper based on each person's degrees of separation from you. You might need to add additional pieces of paper and tape them together - get creative! I invite you to take ten minutes to work on this.
- **[After 10 minutes]** So, now that we've articulated who is doing the work, let's ask ourselves who else we would like to include. Again, as you think of others, write their name (or role) on the appropriately-colored Post-it and continue to build your web together, thinking about the actual and desired spread of participation. Let's all do this together for another ten minutes.
- **[After 10 minutes]** OK, by now we should have a pretty big web. At each table, let's take a step back together for the next 15 minutes and ask, "Who knows whom? Who has influence and expertise? Who can block progress? Who can boost progress?" As you answer these questions, illustrate them with connecting lines.
- **[After 15 minutes]** Now, what kinds of strategies can we develop to 1) invite, attract, and "weave" new people into this work; 2) work around blockages; and 3) boost progress? Let's take another ten minutes to discuss.
- **[After 10 minutes]** Let's briefly go around the room for each table to tell us what stood out most from your conversation.

## Activity 8 - Who/What/When Matrix

**Activity Type:** Convergent

**Goal(s):** To identify specific next follow-up actions based on exercises and volunteers to move them forward; to identify potential participants for future project activities

**Reference material:** [Who/What/When Matrix - Gamestorming](#), [Dot Voting: A Simple Decision-Making and Prioritizing Technique in UX - Nielsen Norman Group](#)

**Supplies:** 1 easel pad per table, markers

**Outcomes:** A list of participants with articulated commitments, for future follow up by the project team

### Script:

- For our last activity, we're going to turn this over to you to articulate how to move this work forward and what you'd be willing to commit to following up on back at your institution or within your communities. Thinking back to our last few activities - 15% Solutions, 25/10 Crowdsourcing, and Social Network Webbing - we've had you look at what next steps you can take as individuals, shared ideas and potential next actions, and looked at the network of people involved in work supporting archival discovery and delivery. In this exercise, we realize that actions don't take themselves, and

people don't commit strongly to actions as they do to one another, so we're going to take an approach to use a "people-first" approach to determine how you want to continue this work.

- At your tables, take a sheet from your easel pad and draw three columns: one for **Who**, the person or people taking the action; one for **What**, which is the action to be taken; and **When**, for when you think that item will be done. Actions could include something like "take a software developer out for coffee," or "set up regular calls with my peers in public services from other institutions." Ideally, everyone at your table should commit to at least one action, and there should be at least one sheet for your entire table. So, for example, if I were to commit to something, I would write **my name** in **Who**, **send email to participants with a report out about the Forum** under **What**, and "by February 28" under **When**. We'll spend ten minutes doing this at your tables.
- **[After 10 minutes]** Now that we have the lists written up, let's put them up on the wall. You'll also see dot stickers on your table - bring those with you when you hang up the lists on the wall. Let's go from table to table and walk through each item on the list and say who will do what by when. Again, we'll need to keep it brief, so summarize quickly. You can ask for follow-up later if you'd like. **[Max 15 minutes]**
- **[Transcribe lists after Forum conclusion]**

## Break (15 minutes)

**Activity type:** Break

**Outline:**

- Remind people that we're starting promptly at 11:00

## Retrospective (30 minutes)

**Activity Type:** Convergent

**Goal(s):** Feedback

**Reference material:** [The 4L's: A Retrospective Technique](#);

**Supplies:** Google Docs for notes, post-its and pens

**Outcomes:** Information to check on course correction

**Script:**

- Now that we've concluded the last exercise for the day, we're going to spend some time reflecting on today. As a reminder, we started the day with breakfast, and then moved into the social network webbing exercise to **[insert phrase]**. We then identified the Who/What/When Matrix to identify potential next steps and ask you what you're willing to commit to moving forward. Our focus today was on a convergent approach to get you to help identify the most promising courses of action, and to motivate you as participants to contribute to future work.
- To help you reflect, we're going to use a technique called the 4Ls retrospective. The 4Ls are **Liked**, **Learned**, **Lacked**, and **Longed For**. For liked, think about what you enjoyed or what went well - it could be anything from the content, the tools, to conversations you've had with people. For "Learned," think about something that you learned today or across the last few days - any new discoveries, points of interest, or highlights. For "Lacked," think about what seemed to be missing today. Was anything unclear? Did you need something to make your participation go more smoothly? For "Longed For," try to think of something that you wish existed or was possible that would ensure

that the Forum would be successful. Write each of your items on a post-it note, and remember which of the 4Ls each post-it is associated with. We'll give you five minutes in individual reflection.

- **[After 5 minutes]** At your tables, have one person draw two lines on a sheet of the easel pad to divide it into four quadrants. Label each quadrant with one of the 4Ls. Share your responses with the 4Ls with one another, and place them on the sheet of easel pad. Discuss with one another, and feel free to add any others should they come up. We'll spend 10 minutes doing that.
- **[After 10 minutes]** OK, let's place the sheets on the wall, and we'll go around each group. You only have about a minute each to walk us through some of the 4Ls that stuck out in your group.

## General Q&A/What's Next (30 minutes)

**Activity Type:** Convergent

**Goal(s):** Feedback; inform participants of future work

**Reference material:**

**Supplies:** Google Docs for notes

**Outcomes:** feedback

**Script: (develop more detailed notes/script)**

- Project plan
  - Forum → digest outputs → draft report
  - Working meeting → statement of principles
  - Integration handbook/case studies
  - Project whitepaper
  - Presentations/publications
- What questions do you have for us?

## Lunch (120 minutes)

**Activity type:** Break

**Outline:**

- Remind people we officially conclude at 2 PM.
- People can sit where they like and follow up
- Share documents for feedback
- Share survey
- Remind people that forum concludes at 2:00

## Facilitator debrief (60 minutes)

**Activity type:** Debrief

**Outline:**

- What went particularly well, or where did participants struggle?
- Were there any concerns about potential Code of Conduct or Community Agreements violations?
- Were there any specifically promising discussions?
- Where did we feel like we didn't have enough time on a topic or activity?

Lighting the Way Forum - 25/10 Crowd Sourcing Ideas				
Score	Tags	Idea	First step	Notes
23	structural change	Decolonize the Archives	Marginalized groups need to be part of and leading the conversation	community collaboration is a long-term relationship not one-off project
23	structural change; collection development	Integrate anti-racism and feminist frameworks into our collection policy	Prioritize work that elevates marginalized communities	
22	structural change; description/metadata	Crowdsourced terminology bank that has terms that should be used, i.e. non racist	Start a committee to review current issues	
22	structural change; community engagement; rethink policy	Indigenous data sovereignty	Larger institute can assist by recognizing and giving expert authority to the respective group	
22	simplify tech; collaboration/communication	Reduce reliance on bespoke software development	Document and share similar/identical system architectures	
22	rights/reuse	Develop a strong, profession-wide stance/statement/justification that digitizing and displaying archival material is a transformative use and not copyright infringement	Develop backbones and embrace risk	
20	shared regional/national projects; VRR	A "national" virtual reading room	Elevate and join the national aggregator idea (NAFAN)	
20	structural change; description/metadata	Move away from name and subject authorities for archival description (when the authorized stuff doesn't fit/is wrong/is unethical)	Case study - a single collection project: create and publish local headings with crosswalks to authorized headings that don't work	
20	community engagement; digitization strategy	Develop and implement a digitization/digital collections strategy that is based on priorities gathered from a wide selection of users/stakeholders	Survey students, faculty, patrons	
20	UX/usability; shared regional/national projects; VRR	Develop parameters/user studies for a national "virtual reading room"		embargoes; view only; metadata only; token/login based access; born-digital; community centered review, approval
20	improve discovery	Get our archival resources findable where people look for all things	Break down EAD/systems to promote folder/resource-level findability distinct from (but still linked to somehow) their collection context	
20	shared regional/national projects; resource sharing	National digital archives sharing network	Get well-resourced institutions to commit ongoing funds	
20	shared regional/national projects; simplify tech; resource sharing	Contribute to shared infrastructure for delivery/discovery of archival description and digital assets	Stop building homegrown tools; embrace community projects	
19	shared regional/national projects; communication/collaboration	National repository for documentation	Identify an appropriate SAA discussion & begin sharing the idea and soliciting feedback	Many archivists already share their own documentation regarding both systems and workflows, but not in a systematic way. I propose some kind of national repository where institutions can link their documents, Githubs, etc. so they are discoverable to other professionals and we can learn from each other.
19	shared regional/national projects; resource sharing	A national DAMS/access preservation system that any archive can contribute digital objects, metadata, archival description, authority records, so they don't have to build and maintain their own system	Figure out who is in charge and how it will be sustainably funded	
19	structural change; best practices	Create standards for ethical community engagement for archival projects and interactions	Convene people who do a great job already at this	
19	structural change; best practices; description/metadata	Create and publish anti-oppressive descriptive practices for LGBTQ+ materials	Find our birds of a feather/institutional collaborators	
19	open source	Publicly accessible special collections libraries will only use open source discovery platforms	Agree that is the standard	
19	UX/usability; shared regional/national projects	Conduct a distributed, lightweight user study involving all of our organizations and aggregate our findings/insights	Define a lightweight interview question set we could use	
18	UX/usability; shared regional/national projects	Conduct a large scale usability study that incorporates feedback from a wide range of users/potential users looking at many systems (ArchivesSpace/other public interfaces, regional/consortial platforms, etc.)	Form a project advisory board with members from a wide range of institution types/sizes/etc; apply for SAA Foundation funds	
18	rethink tech; structural change; improve discovery	Make flexible systems that allow archivists to create custom "finding aids" (i.e., not Finding Aids) that are hyper relevant to their users and collections. They should be able to talk to each other across contexts but not require them to conform to systems and standards that privilege certain communities over others.	Any ideas?	

Lighting the Way Forum - 25/10 Crowd Sourcing Ideas				
Score	Tags	Idea	First step	Notes
18	collaboration/communication	Put delivery systems designers on the reference desk/in the special collections classroom	Provide cross training or form a small group at institution to facilitate active collaboration between front-line service providers and behind the scenes tech people	
18	collaboration/communication	Host more forums like this one at regional conferences	Find potential organizers who are associated with specific regions/regional associations	
18	accessibility; UX/usability	Automated accessibility checking for archives: something pluggable into CI/CD frameworks and seasoned for archival interactions	Environmental scan of existing tools and reconcile with archives' use cases	
18	collaboration/communication; resource sharing	Institutions that have a lot of tech resources to develop systems could also provide a service to help small institutions implement them (beyond just sharing the code)	Complete documentation and a database of people who would be willing to implement open source systems	
18	open source; collaboration/communication	Establish functional requirements for an open source request management system	Solicit input from the archival community	
17	UX/usability	Eliminate archival jargon/terminology	Conduct usability research focused on whether users understand said terminology	
17	simplify tech	Stop replicating the same information across multiple systems	Document workflows and the data handoffs between systems and share this documentation with my organization to show redundancy	
17	rethink tech; UX/usability	Develop a method for aggregating item-level digital objects to present in "folder view" image viewer on a finding aid (allowing appropriate level of description for different access systems)	Define functional requirements	
17	collaboration/communication; structural change; collection development; community engagement	Kick start a nationwide oral history initiative that will involve getting the entire community involved in the translation of existing oral histories and the documentation of new oral histories	Building a genuine relationship with TON [Tohono O'odham Nation?] tribal members by setting up meetings with each of the 11 district chairs	
17	description/metadata	Develop a scalable way of generating minimum collection- (and optional item-)level metadata to help organizations with no current discoverable information	Determining what "minimum" level is (DACS? Dublin Core? Something else completely?)	
17	UX/usability; accessibility	Usability and accessibility how-to for archivists	Understand hurdles and barriers in archives practice	
17	community engagement	Continuously encourage and support archival instruction and outreach that is community based (not about donors or classroom based)	Hire archival instruction librarians and have a plan to target groups not represented in archival research	
17	rethink tech; structural change	Modifying/creating archival management and discovery systems that work offline	Incentivize teams working in different online contexts to prototype solutions for their context and knowledge share/collaborate in the process	
17	shared/national infrastructure; VRR	Have a regional/nationwide virtual reading room to provide mediated access to copyrighted/culturally sensitive archival collections		
16	rethink policy; rights/reuse	Radical Access	Well-thought out reasoning to charging people (photos, digitization, weird fees, etc.) - i.e. do we need to do this? How is the money used? Is this really necessary for our institution?	No/limited barriers to entry/use; less information required of researchers; why IDs? ; what security "concerns" are valid and which are professional tradition and which can be discarded/forgotten?; K-12 community education/instruction outreach (i.e. "use us if you'd like!"); roving archival checkout boxes for K-12 instruction (a la Princeton's Cotsen Lib.); ILL of archival materials
16	structural change; community engagement;	Turn every archives into an organization that works post-custodially while fully funding labor and technical infrastructure that allows for an appropriate balance of hyperlocal and widespread access to records based on specific cultural regulatory contexts	Connect with donor communities at your archives to develop a preservation and access process that works for them	
16	UX/usability	Focus on users over standards, professional considerations, formats, legacy systems	Stop running and start listening	
16	description/metadata	Let's fix all the messed up dates in our metadata	Analyze dates in large aggregation of finding aids and MARC records to figure out what to do	
16	UX/usability	Evaluate and improve usage data	Evaluate the usage data we collect; decide how to use it or lose it; and identify the gaps	
16	improve discovery; collaboration/communication	Create a set of requirements that all discovery and delivery systems must meet before being implemented (e.g. conforms to ADA standards for all users)	Create a group to moderate the list and invite the entire community to add items/make suggestions, explain reasoning	
15.5	rights/reuse	Liberate the archives! Make it a priority to enable the reuse of collection items to maximize the advance of knowledge	Determine the copyright status of archival items and share determination with patrons	

Lighting the Way Forum - 25/10 Crowd Sourcing Ideas				
Score	Tags	Idea	First step	Notes
15	resource sharing; community engagement; structural change	Collectivize Area archival access practitioners so that large institutions pay for those services & small/under-resourced communities can have them provided pro-bono while maintaining agency	Begin organizing through 1 on 1 meetings	
15	description/metadata; analysis	Explore applying machine-learning approaches to a massive corpus of finding aid and digital collection data (e.g. SNAC, DPLA, Hathi, Europeana); also evaluate scope/contour of collection	Build a coalition of research and dev partners	
15	rethink tech	Collection management software that works for archives and museum collections	Determine core functions of both types of description	
15	professional development; collaboration/communication	Host skillshare/brown bags where staff can/must participate monthly to learn from each other - break down barriers/job role divisions for better understanding and support		
15	open source	Archives commit to only use open source software for archival discovery and delivery	Commitment from big/well resourced institutions	
14	description/metadata; simplify tech	Create a common data model for archival description to share across systems and make them simpler	Find a community and establish principles	
14	improve discovery; shared regional/national projects	Build one federated system that supports discovery & access to all special collections materials (finding aids, archives, single item manuscripts, books, etc.) so users don't have to toggle between systems. And, allow it to enable requesting	Be willing to change/reconsider the structure of the finding aid if necessary	
14	description/metadata	Turn finding aid inside out	Turn requestable item into record linked to other description	
14	crowdsourcing; description/metadata	Integrate metadata/contextual information generated by researchers & students	Conduct contextual inquiry studies to understand how scholars record; organize; augment archival collections	
14	description/metadata; improve discovery	Take a long pause with/from digitization (excluding patron requests) to focus on cleaning up our metadata and UI for improved discovery, searchability, and online access to existing digitized/digital materials		
14	UX/usability	User centric systems	Gain teams to focus on collecting stories, outreach, feedback	
14	description/metadata; translation	Create a New Deal-esque translation corps focused on archival description	Pick a target language of my institution	
13	rethink tech	Create a structured system to evaluate archival systems based on integrability	Review existing models for this in healthcare systems, etc.	
13	crowdsourcing; description/metadata	Develop an infrastructure that allows for all kinds of description including crowd-sources and user generated description	Identify a way for folks to create crowd sourced description that is consistent	
12	improve discovery	Users enter query into system using natural language and get relevant results	Machine learning of finding aid structure and description/content	
12	description/metadata; structural change	Blow up LCSH	Gather feedback/ideas from stakeholders in mis/underrepresented constituencies	
11	advocacy; communication/collaboration	Find a champion to help push your ideas	Talk to faculty, donors, community, colleges, other professionals, etc.	
11	improve discovery; simplify tech	One search box for all library content/collections	Queries return catalog resources, archives, special collections, data, all	
11	staffing	Create a discovery and access archivist position even if it may mean changing the title/job of a staff member whose position is very narrow/obsolete		
10	data gathering/analysis	Assessment project of hidden collections at many institutions	Plan and instrument	
10	crowdsourcing; description/metadata	Let users add description (and reviews like Amazon products)	Talk to vendors about how to make it happen	
8	digitization strategy; rethink policy	To increase access to AV - rapid mass digitization of all archival AV in collections, and then rapid transcribing and/or audio description of all AV including born-digital	Lower expectations surrounding archival control/description before digitization	
8	rethink policy	Let patrons browse in stacks and pull their own materials	"Open stacks" hours with staff attendant?	
7	resource sharing; structural change	A fund that does not end and supports projects		
	community engagement; structural change; collaboration/communication	Prioritize building communication channels with particular communities we serve (especially those with less existing wealth and power)	Prioritize collection processing to make access a possibility; decline projects which are scoped unsustainably around bespoke access solutions/ideas	Not scored

<b>Anonymized Who/What/When Matrix Actions</b>	
<b>What</b>	<b>When</b>
research more around minimal computing strategies, starting with WAX	March 2020
develop plan to create finding aids for Cuba collections	March 2020
Brainstorm policy to fund U6 user driven digitization	By end of FY20
Circle back on conversations with library copyright/privacy person regarding making data from archival collections openly available	Feb/March 2020
Re: crowdsourced description -- work with digital library folk re: how to integrate crowdsourced transcriptions of legacy data/notes into our repositories	Feb/March 2020
Re: putting things where people find it -- continue efforts to extract data from archival collections and deposit them into appropriate domain repos	Feb/March 2020
Share findings of user study at my institution	by end of 2020
Continue to help develop our DAMS (Islandora 8) developer is contributing back to community	ongoing, already in progress
Dedicate at least one hour each week to learn more about anti-racism feminist frameworks and open source systems	start in 2 weeks
Take a copyright risk management course	May 18 & 19
Host zine workshop for students and show as many perspectives as possible	
Continue DEI work with SAA committee on education	
Advocacy for indigenous data sovereignty, bringing more awareness to institutions with large indigenous holdings/materials	YESTERDAY!
Solidify connections with under-represented user/represented comms; schedule concrete events to build these	end of May
Propose setting aside staff time to research POC in the archives in order to better describe them	later this week (proposal) in 2020 (the research)
Continue VRR conversations w/ CDL, Atlas, other UCs	At lunch! this is a pretty long-term commitment so ... I dunno
Get our resources where users find all the things: aka "flip EAD" step 1: find whose idea this is; step 2: how to start?	Now to find writer, by march to describe my idea and align
Digitization/digital collections strategy -- work with stakeholders in legislative/policy papers to create priorities	Now-April (conference) to reach out/articulate plan
Collect and publish list of variables relevant to fair use and VRRs	Six months (August)
To encourage reuse of digital archives, find opportunities to discuss rightsstatements.org with archival community	Look for opportunities over next 3 months
Open conversation with H of R to update copyright law -- share template for others to contact their reps	Next week, next month
Revise and reinvent our copyright workflows w/in my institution to shift away from a rights clearance model to a risk assessment model	End of 2020



<b>Anonymized Who/What/When Matrix Actions</b>	
<b>What</b>	<b>When</b>
Rewrite collection development policy (and get approved)	By end of March 2020
Have all staff read and discuss the anti-racist description resources and integrate that guidance with our description model	By end of March 2020
Gather/create resources for usability/accessibility for archives	End of 2020
follow up email/survey	End of March 2020
Work with CDL and other UCs on virtual reading room project and develop specifications to support this functionality in Aeon (e.g. authentication, delivery, etc.)	At lunch (2/12) and ongoing --> write specs by June 2020
Read more about reparations frameworks /move away from philanthropic thinking	Next 6 months
Develop ArchivesSpace API helpers library (Python)	Next 2 months
Send a list of feature requests for Circa	by the end of February 2020
Explicitly identify women and POC collections materials	ongoing
Accessibility audit of O/S projects & requirements for new projects	2020
Solicit input on functional requirements for O/S request management	Summer
NAFAN - Move forward with our partner orgs - next steps - pursue kickstarter grant funds	Now! - Summer
VRR + request management use case gathering - identify a coalition to crowdsource reqs.	Now! Get discussion going
Policy + protocol for users + OAC/Calisphere contributions to address biased + racist descriptions	Now - Spring - Share Policy + Protocol
Learn what it means to decolonize the archives & how it applies to my repository	Spring
Talk to SHRAB about incorporating top 10 priorities into upcoming strategic goals	June
Share NAFAN info w/ AASLH for their 250th commemoration which is working on a national db for collections data	When I get home
Commit to open source software	ongoing for 2-3 years for specific project
deconstructing the finding aid to make thing[s] (iobjets, folders) findable where people look -- prototype with colleague @ our place	Rough sketch - 1 year?
Think about the starting steps for decolonizing the archive, and how to convince folks interested in working on this (i.e. radical empathy, Archivists Against, etc.) --> try again (choir breiething for liberation	Always
Terminology bank - environmental scan	fall 2020
Black finding aid aggregator collection	2021
User study - student	December 2020
Discovery tool for finding aids	Summer 2020
TN regional finding aid network	[Summer 2020? unclear]
Resources findable where people search	

<b>Anonymized Who/What/When Matrix Actions</b>	
<b>What</b>	<b>When</b>
1. Require processing archivist to link FA in wiki as part of A&D workflow	update processing manual by June 2020
2. Learn more about SEO & schema.org via lit review	look for SEO workshop via NY continuing ed resources by August 2020
Identify creating communities & subjects of our records & incorporate them in a user study	Month (part 1) Winter 2020 (part 2)
Description audit to identify offensive lang in our legacy description using projectstand toolkit	Begin by fall 2020
Identify problems publishing multilingual FA and create some local guidelines to address	by May 2020
Ask PASCL if my institution can join	2 weeks
take these conversations back to my statewide portal/lead improvements to best descriptive practices and integration of digitized content and rights issues	summer 2020
Digitization strategy- invite participation to inform conversation and outcomes from top 10 ideas share at 2020 membership mtg HBCU library alliance	summer 2020/Oct 2020
ABHS- explore ways to contribute our FAs to larger networks and explore what delivery systems are available for us	Ongoing 2020
Take conversations re: decolonizing/inclusivity to Assoc. of Lib & Archives @Baptist Inst. ALABI	May 2020
Reading/research on indigenous collection and the desired access and practice of access	March
Assess use of hyperlocal systems for archival discovery and delivery (especially born-digital material related) and their degree of interoperability	March
Catch up on ArcLight	Next 4 weeks
Advocate for changes to Aeon API to support user needs	Next 6 weeks
Want to assist with virtual reading room but don't know how	Help?
With new head of archives (and other stakeholders) begin to talk about need for interoperability of our systems to get our archives findable. Get commitment to and create plan for creating interoperable system.	Start conversation: June 2020; Plan creation start: Jan 2021
Create "local" subject headings list for our collections (with librarians/archivists)	Start: Fall 2020
Review terms/remove racist, sexist (etc.) headings from our collection guides and systems	Start: June 2020
Gather and summarize integration/architecture diagrams with goal to identify patterns and contribute approaches	May 2020
Identify mechanisms to support integration with Mukurtu and/or traditional knowledge labels	July 2020
Create repository for organizations to share their system diagrams for integrated archival discovery and forum for discussion	September 2020

<b>Anonymized Who/What/When Matrix Actions</b>	
<b>What</b>	<b>When</b>
Build consensus internally and commit to using only open source	2020-2021
Plan for ongoing user studies (regular)	2020-2021
For NAFAN user studies, reflect on forum findings and how they fit into proposal	This month!
Reading list related to indigeneous-terminology in Canada	February-March
Promote accessibility focus library wide and connect to broader implementation/standards discussion	2020
Build local connections to share systems and support resources	End of February for conversations
CC licenses as access/use statements, rights statements as backups	End of summer
Replace bespoke finding aids application with open source. Write about how/why/lessons to help others do a similar migration.	July 2020
Prioritize digitization projects in collaboration with campus library diversity working group	Ongoing effort, but... create prioritized project list by end of spring semester 2020
Explore/research how to provide secure digital access to archives w/ personal info (what system to use?). Prepare contingency plan for sensitive/intl. archives	Now, build by fall 2020
Check in on ArcLight test implementations at other insitutions. Blog?	March
Get admin support for cross-repo user study	April/May
Explore shared software solutions vs bespoke software solutions	2020
De-prioritize LCSH in our docs and design planning	Summer/Fall 2020
Convene leadership to discuss reevaluation of terminology in FA	March
Explore alternatives to the finding aid as sole delivery product (written or prototype)	June
Quarterly (Google Analytics) Aeon data reports --> sharing dept. wide which should communicate user & priorities for digital projects	End of March for next one & cont.
Accessibility How-Tos	By Sept.
Work on getting user (researcher + faculty) priorities into Digitization Pipeline (communication + workflow)	June
Virtual Reading Room, Yes, Please!	Start the convo now
Continue conversations about marketing/promoting what we struggle with as much as celebratory	1 month
Map and Communicate ecosystem and stakeholders	Quarter

<b>Anonymized Who/What/When Matrix Actions</b>	
<b>What</b>	<b>When</b>
self-education/reading around decolonizing the archives, indigenous data security	Immediatly
Tap into accessibility convos already happening, Curation goals, audit	FY 20-21 goals
Talking to ref/academic programs about users, especially students (user advisory? usability study?) include entire ecosystem	3 months initial convo w/ academic programs person
talk to library staff meeting about Lighting the Way Forum; synthesize forum work to figure out what to take back; bring top 10 ideas as ex: of consensus in forum	Tuesday
self-education/reading around decolonizing the archives, indigenous data sovereignty	[no date listed]
talk to managers group meeting re: copyright working group	March 3
talk to reading rainbow group re: LTWF and take aways	March ?
Change collection development policy by incorporating anti racist and feminist frameworks (then publish!)	March ?
Say "no" on behalf of the team members to advocate for their capacity	starting immediately
UC VRR conversations	"(today! :)"
Integrate LTWF info into ARCH 2020 lesson plans & info	Now --> July
start talking about digital access as a VRR as a way to move my org out of our hang up on digital libraries/repositories	now
Finish Native American protocols case study	Summer 2020
Continue subject guide project	2021
Advocacy to get Lucidea ArchivERA/find out community needs by conducting outreach	Now
Collection development policies at my institution and how we are addressing marginalized, non-dominant cultures/content	April 2020
Connect our metadata librarian with folks who are also interested or doing work on non-dominant terminologies (and linked data)	March 2020
Codify digitization strategies to ensure we have mechanisms in place, including self-critique, to make sure we are representing marginalized, non-dominant cultures/content	June 2020
Community development of ArcLight	July 2020
Convene local team to provide feedback on transition to Arclight	2/17/2020
Connect with UNC-CH and coordinate strategy for locating/remediating racist language in archival description	End of Spring
Digitization strategy / stakeholder / buy-in (reach out to DLF for other institutional models)	February/March
Offer to help plan/convene initial discussion of national virtual reading room	February/March

<b>Anonymized Who/What/When Matrix Actions</b>	
<b>What</b>	<b>When</b>
Devise initial plan to translate Aviary into all 22 languages from my archives	April/May
Contact LTW Forum attendees about forming a working/reading group around UX/Developing a User study	March 2020
Look into Circa & reach out to public services about RMS open source	Next week
Gather examples of collections & digitization prioritizes that are inclusive/prioritize marginalized groups	April 2020
Migrating site from Drupal 7 to Drupal 8 and will be improving accessibility and usability. Redesigning Search interface after based on usability studies. Will conduct usability studies and AB tests again this year.	All completed hopefully by end of 2020

# Lighting the Way Forum Feedback

---

Start of Block: Overall Satisfaction

Q1

Lighting the Way Forum  
February 10-12, 2020

Thank you so much for attending the Lighting the Way Forum (either in person or by livestream), and for taking the time to leave feedback about your experience. This survey will take about 7 minutes to complete.

-----  
Page Break

---



Q2 How likely are you to recommend the Lighting the Way Project to a friend or colleague?

- 0 (0)
- 1 (1)
- 2 (2)
- 3 (3)
- 4 (4)
- 5 (5)
- 6 (6)
- 7 (7)
- 8 (8)
- 9 (9)
- 10 (10)

-----  
Page Break \_\_\_\_\_

Q3 What did you like **most** about the Lighting the Way Forum?

---

---

---

---

---

-----  
Page Break



Q4 What did you like **least** about the Lighting the Way Forum?

---

---

---

---

---

-----  
Page Break



Q5 In which of the following aspects of the event were you **most** interested?

- Learning about the project and its goals (404)
  - Watching invited presentations (405)
  - Participating in facilitated activities (409)
  - Social interactions/informal conversation with other participants (410)
  - Other (Please specify) (411)
- 

-----  
Page Break

---



Q26 In which of the following **goals** of the event were you **most** interested?

- To visualize, map, build connections in archival discovery/delivery – between one another, their work, the systems they rely on, and the communities they serve (1)
- To organize around shared opportunities/challenges in archival discovery/delivery (2)
- To provide a platform for engagement with the project (3)

-----

Page Break

---

Q28

How satisfied are you with how the Forum addressed this goal:

**To visualize, map, build connections in archival discovery/delivery**

- Extremely satisfied (1)
- Somewhat satisfied (2)
- Neither satisfied nor dissatisfied (3)
- Somewhat dissatisfied (4)
- Extremely dissatisfied (5)

-----  
Page Break

---

Q29

How satisfied are you with how the Forum addressed this goal:

**To organize around shared opportunities/challenges in archival discovery/ delivery**

- Extremely satisfied (1)
- Somewhat satisfied (2)
- Neither satisfied nor dissatisfied (3)
- Somewhat dissatisfied (4)
- Extremely dissatisfied (5)

-----  
Page Break

---

Q31

How satisfied are you with how the Forum addressed this goal:

**To provide a platform for engagement with the project**

- Extremely satisfied (1)
- Somewhat satisfied (2)
- Neither satisfied nor dissatisfied (3)
- Somewhat dissatisfied (4)
- Extremely dissatisfied (5)

End of Block: Overall Satisfaction

---

Start of Block: IMLS Build Capacity Metrics

Q35 In this next section, you are being asked to reflect on whether the Lighting the Way Forum has helped you and your organization build capacity in terms of archival discovery and delivery.

-----

Page Break

---

**Q36 The Lighting the Way Forum has better prepared me to improve archival discovery/delivery at my organization.**

- Strongly agree (11)
- Somewhat agree (12)
- Neither agree nor disagree (13)
- Somewhat disagree (14)
- Strongly disagree (15)

-----  
Page Break \_\_\_\_\_

Q42 The Lighting the Way Forum has better prepared me to collaborate with people across different roles/professional fields.

- Strongly agree (11)
- Somewhat agree (12)
- Neither agree nor disagree (13)
- Somewhat disagree (14)
- Strongly disagree (15)

---

Page Break



Q37 The Lighting the Way Forum helped me grow my expertise to improve archival discovery/delivery **for the communities my organization serves.**

- Strongly agree (11)
- Somewhat agree (12)
- Neither agree nor disagree (13)
- Somewhat disagree (14)
- Strongly disagree (15)

-----  
Page Break

---

Q38 The Lighting the Forum was a valuable networking opportunity.

- Strongly agree (11)
- Somewhat agree (12)
- Neither agree nor disagree (13)
- Somewhat disagree (14)
- Strongly disagree (15)

---

Page Break

Q39 What did you learn at the Lighting the Way Forum?

---

---

---

---

---

-----  
Page Break

Start of Block: Attribute Satisfaction

EA1 How satisfied were you with the following:

**Venue**

- Extremely satisfied (1)
  - Somewhat satisfied (2)
  - Neither satisfied nor dissatisfied (3)
  - Somewhat dissatisfied (4)
  - Extremely dissatisfied (5)
  - Not applicable (6)
- 

EA2 How satisfied were you with the following:

**Food**

- Extremely satisfied (1)
  - Somewhat satisfied (2)
  - Neither satisfied nor dissatisfied (3)
  - Somewhat dissatisfied (4)
  - Extremely dissatisfied (5)
  - Not applicable (6)
-

EA3 How satisfied were you with the following:

**Lodging (Cardinal Hotel/Schwab Residential Center, booked by project team)**

- Extremely satisfied (1)
  - Somewhat satisfied (2)
  - Neither satisfied nor dissatisfied (3)
  - Somewhat dissatisfied (4)
  - Extremely dissatisfied (5)
  - Not applicable (6)
- 

EA4 How satisfied were you with the following:

**Audiovisual/Livestream**

- Extremely satisfied (1)
  - Somewhat satisfied (2)
  - Neither satisfied nor dissatisfied (3)
  - Somewhat dissatisfied (4)
  - Extremely dissatisfied (5)
  - Not applicable (6)
-

EA5 How satisfied were you with the following:

**Facilitated activities (e.g. TRIZ, Speedboat, etc.)**

- Extremely satisfied (1)
  - Somewhat satisfied (2)
  - Neither satisfied nor dissatisfied (3)
  - Somewhat dissatisfied (4)
  - Extremely dissatisfied (5)
  - Not applicable (6)
- 

EA6 How satisfied were you with the following:

**Plenary presentations (Day 1 only)**

- Extremely satisfied (1)
  - Somewhat satisfied (2)
  - Neither satisfied nor dissatisfied (3)
  - Somewhat dissatisfied (4)
  - Extremely dissatisfied (5)
  - Not applicable (6)
-

EA7 How satisfied were you with the following:

**Length of forum**

- Extremely satisfied (1)
  - Somewhat satisfied (2)
  - Neither satisfied nor dissatisfied (3)
  - Somewhat dissatisfied (4)
  - Extremely dissatisfied (5)
  - Not applicable (6)
- 

EA8 How satisfied were you with the following:

**Length of breaks**

- Extremely satisfied (1)
  - Somewhat satisfied (2)
  - Neither satisfied nor dissatisfied (3)
  - Somewhat dissatisfied (4)
  - Extremely dissatisfied (5)
  - Not applicable (6)
-

EA9 How satisfied were you with the following:

**Logistics (including registration/reimbursement)**

- Extremely satisfied (1)
  - Somewhat satisfied (2)
  - Neither satisfied nor dissatisfied (3)
  - Somewhat dissatisfied (4)
  - Extremely dissatisfied (5)
  - Not applicable (6)
- 

EA10 How satisfied were you with the following:

**Inclusiveness of the forum** (active facilitation, Community Agreements, Code of Conduct, travel support)

- Extremely satisfied (1)
- Somewhat satisfied (2)
- Neither satisfied nor dissatisfied (3)
- Somewhat dissatisfied (4)
- Extremely dissatisfied (5)
- Not applicable (6)

**End of Block: Attribute Satisfaction**

---

**Start of Block: Valuable Experiences**



Q13

What would be the most valuable experience we could facilitate within Lighting the Way Forum's project activities? Please list as many ideas as you'd like.

---

---

---

---

---

End of Block: Valuable Experiences

---

Start of Block: Demand Gen



Q14 How did you hear about the Lighting the Way Forum? Select all that apply.

- Email listserve (1)
- Social media post (2)
- Media article (3)
- Friend or colleague (4)
- Conference presentation (5)
- Google (6)
- From a project team member (7)
- Personal invitation (8)
- I don't recall (16)
- Other (17) \_\_\_\_\_

End of Block: Demand Gen

---

Start of Block: Block 6

Q22 Would you be interested in further opportunities to participate in the Lighting the Way project (e.g. writing case studies or giving feedback on project deliverables)?

- Yes (1)
  - Maybe (2)
  - No (3)
-

Display This Question:

If Would you be interested in further opportunities to participate in the Lighting the Way project (... = Yes

Or Would you be interested in further opportunities to participate in the Lighting the Way project (... = Maybe



Q33 Please provide your email address so we may contact you about future participation opportunities.

---

End of Block: Block 6

---

Start of Block: Anything Else

Q18

Is there anything else you would like to share with us?

---

---

---

---

---

End of Block: Anything Else

---

Start of Block: Demographics

Page Break

---



Q19 Which statement best describes your current employment status?

- Working (paid employee) (1)
- Working (self-employed) (2)
- Not working (temporary layoff from a job) (3)
- Not working (looking for work) (4)
- Not working (retired) (5)
- Not working (disabled) (6)
- Not working (other) (7) \_\_\_\_\_
- Prefer not to answer (8)

-----  
Page Break \_\_\_\_\_

Q25 Did you receive travel funding to participate in the Forum? **(Select all that apply)**

I received travel funding from the Forum (1)

I received travel funding from my employer (2)

I did not receive travel funding (3)

I did not need any travel funding (4)

---

Page Break



Q33 What is your ZIP code?

---

End of Block: Demographics

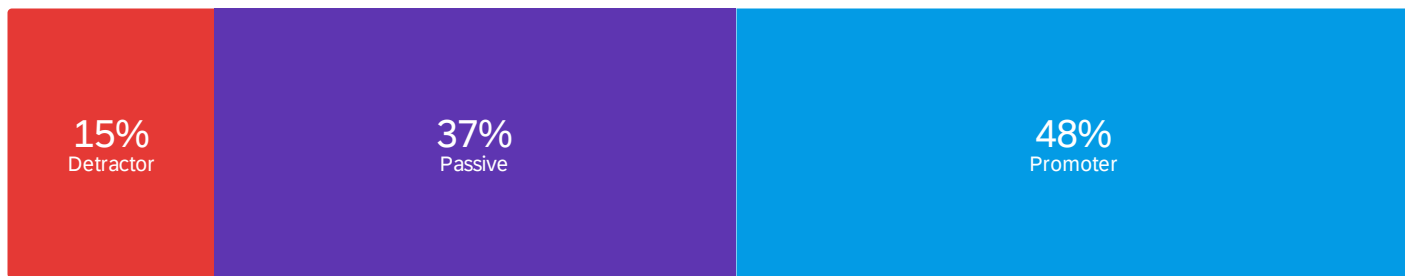
---

# Quantitative Feedback

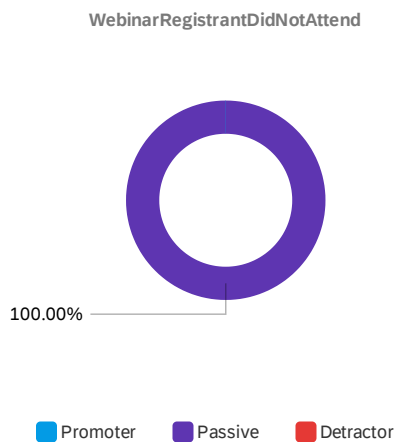
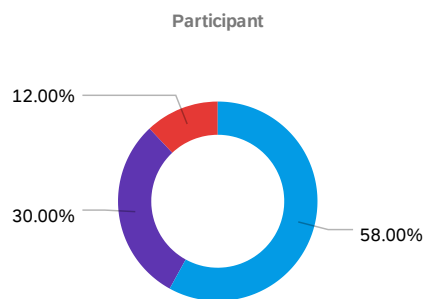
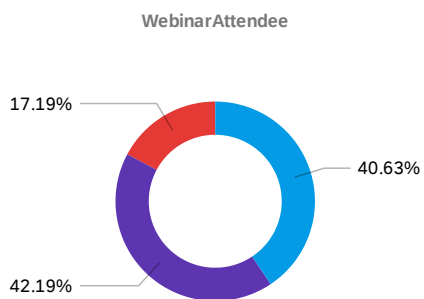
Lighting the Way Forum Feedback

July 17, 2020 4:57 PM PDT

Net Promoter Score (How likely are you to recommend the Lighting the Way Project to a friend or colleague?)

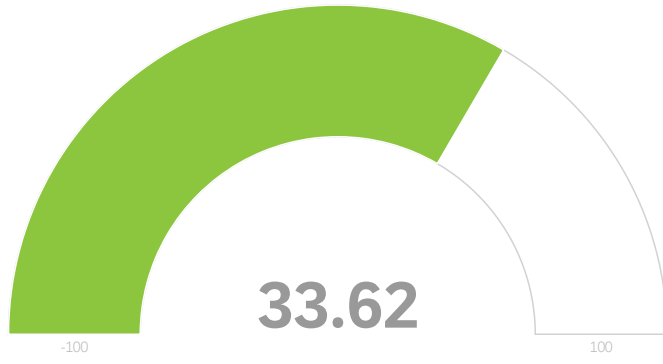


■ Detractor ■ Passive ■ Promoter



■ Promoter ■ Passive ■ Detractor

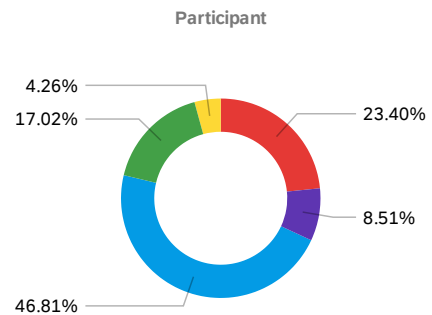
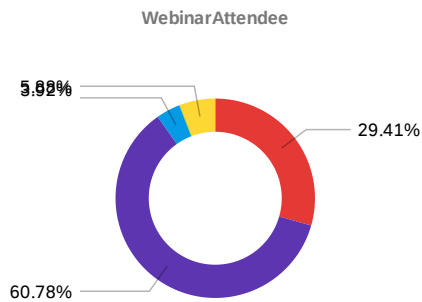
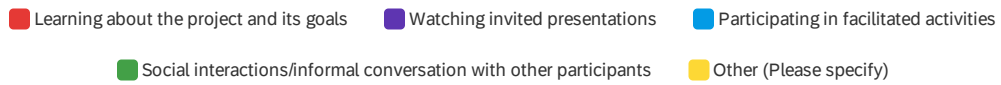
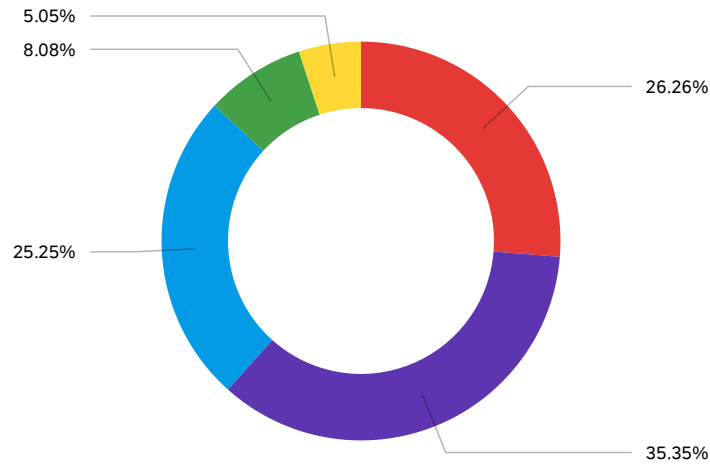
Overall NPS



Participants: 46.00  
WebinarAttendees: 23.08

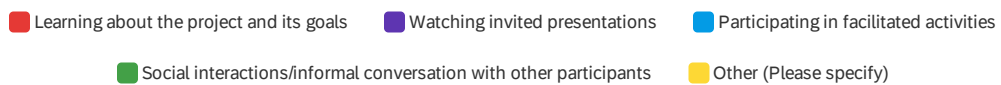


## Q5 - In which of the following aspects of the event were you most interested?



WebinarRegistrantDidNotAttend

NO DATA



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	404.00	411.00	405.22	1.73	2.99	51
2	Participant	404.00	411.00	407.74	2.44	5.98	47

#	Field	WebinarAttendee	Participant	WebinarRegistrantDidNotAttend	Total
404	Learning about the project and its goals	57.69% 15	42.31% 11	0.00% 0	26
405	Watching invited presentations	88.57% 31	11.43% 4	0.00% 0	35
409	Participating in facilitated activities	8.33% 2	91.67% 22	0.00% 0	24
410	Social interactions/informal conversation with other participants	0.00% 0	100.00% 8	0.00% 0	8
411	Other (Please specify)	60.00% 3	40.00% 2	0.00% 0	5

Showing rows 1 - 5 of 5

### Q5\_411\_TEXT - Other (Please specify)

#### WebinarAttendee

Other (Please specify)

I would say all of the above, but I was only able to watch the livestreamed presentations.

It's a tie between the first two: learning about the project and watching presentations.

because I was remote, this was my only option

#### Participant

Other (Please specify)

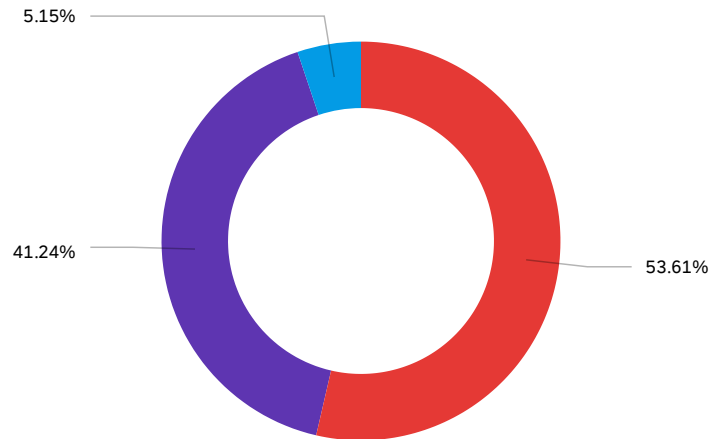
Developing a shared agenda for next steps

Hard to choose between learning about the project and its goals and participating in the facilitated activities. These seem inextricably entwined.

#### WebinarRegistrantDidNotAttend

Other (Please specify)

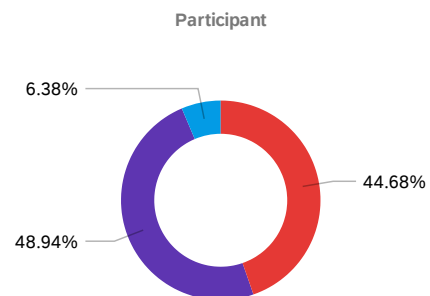
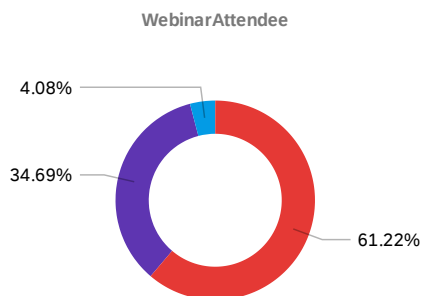
## Q26 - In which of the following goals of the event were you most interested?



■ To visualize, map, build connections in archival discovery/delivery – between one another, their work, the systems they rely on, and the communities they serve

■ To organize around shared opportunities/challenges in archival discovery/delivery

■ To provide a platform for engagement with the project



**WebinarRegistrantDidNotAttend**

NO DATA

■ To visualize, map, build connections in archival discovery/delivery – between one another, their work, the systems they rely on, and the communities they serve

■ To organize around shared opportunities/challenges in archival discovery/delivery

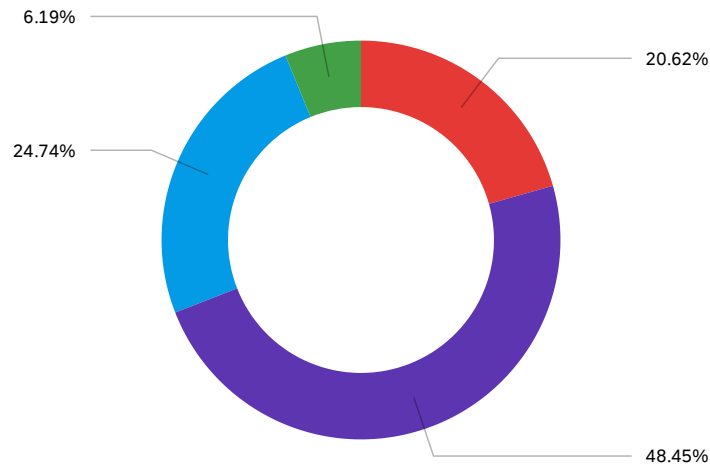
■ To provide a platform for engagement with the project

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	3.00	1.43	0.57	0.33	49
2	Participant	1.00	3.00	1.62	0.60	0.36	47

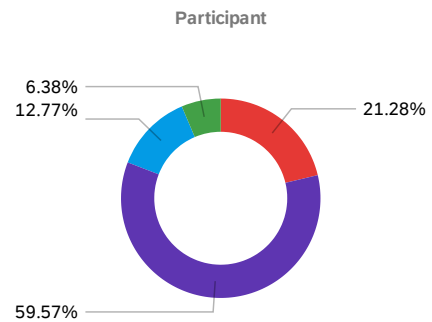
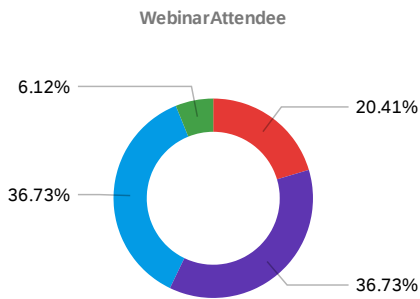
#	Field	WebinarAttendee		Participant		WebinarRegistrantDidNotAttend		Total
1	To visualize, map, build connections in archival discovery/delivery – between one another, their work, the systems they rely on, and the communities they serve	58.82%	30	41.18%	21	0.00%	0	51
2	To organize around shared opportunities/challenges in archival discovery/delivery	42.50%	17	57.50%	23	0.00%	0	40
3	To provide a platform for engagement with the project	40.00%	2	60.00%	3	0.00%	0	5

Showing rows 1 - 3 of 3

Q28 - How satisfied are you with how the Forum addressed this goal: To visualize, map, build connections in archival discovery/delivery



■ Extremely satisfied  
 ■ Somewhat satisfied  
 ■ Neither satisfied nor dissatisfied  
 ■ Somewhat dissatisfied  
 ■ Extremely dissatisfied



WebinarRegistrantDidNotAttend

NO DATA

■ Extremely satisfied  
 ■ Somewhat satisfied  
 ■ Neither satisfied nor dissatisfied  
 ■ Somewhat dissatisfied  
 ■ Extremely dissatisfied

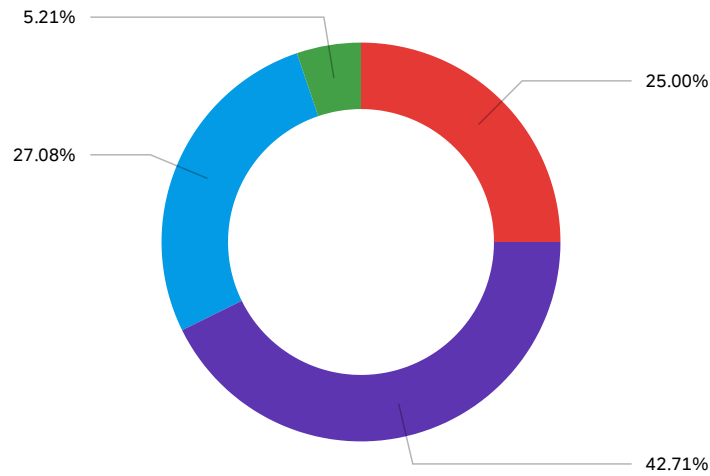
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	4.00	2.29	0.86	0.73	49

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
2	Participant	1.00	4.00	2.04	0.77	0.59	47

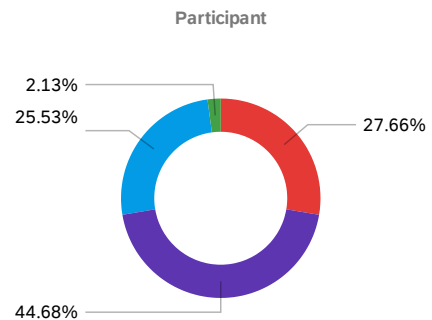
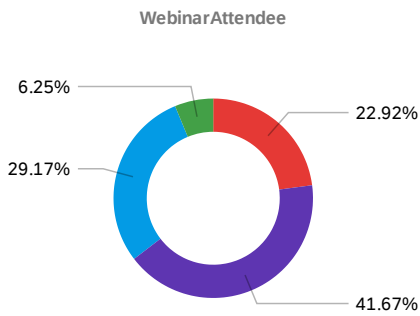
#	Field	WebinarAttendee		Participant		WebinarRegistrantDidNotAttend		Total
1	Extremely satisfied	50.00%	10	50.00%	10	0.00%	0	20
2	Somewhat satisfied	39.13%	18	60.87%	28	0.00%	0	46
3	Neither satisfied nor dissatisfied	75.00%	18	25.00%	6	0.00%	0	24
4	Somewhat dissatisfied	50.00%	3	50.00%	3	0.00%	0	6
5	Extremely dissatisfied	0.00%	0	0.00%	0	0.00%	0	0

Showing rows 1 - 5 of 5

Q29 - How satisfied are you with how the Forum addressed this goal: To organize around shared opportunities/challenges in archival discovery/ delivery



■ Extremely satisfied   
 ■ Somewhat satisfied   
 ■ Neither satisfied nor dissatisfied   
 ■ Somewhat dissatisfied   
 ■ Extremely dissatisfied



WebinarRegistrantDidNotAttend

NO DATA

■ Extremely satisfied   
 ■ Somewhat satisfied   
 ■ Neither satisfied nor dissatisfied   
 ■ Somewhat dissatisfied   
 ■ Extremely dissatisfied

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	4.00	2.19	0.86	0.74	48

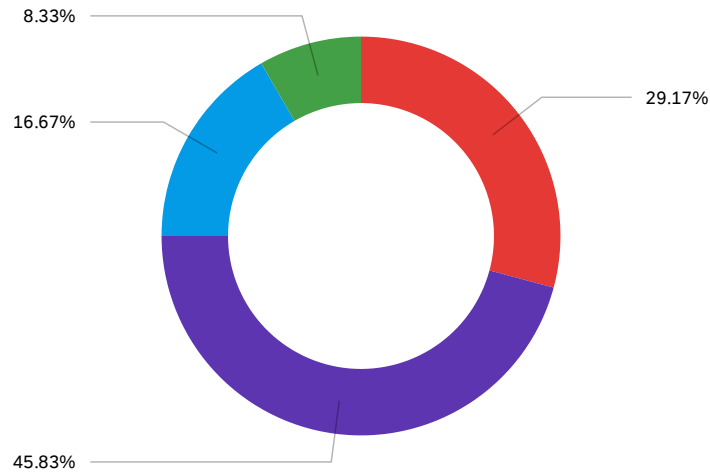
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
2	Participant	1.00	4.00	2.02	0.79	0.62	47

#	Field	WebinarAttendee		Participant		WebinarRegistrantDidNotAttend		Total
1	Extremely satisfied	45.83%	11	54.17%	13	0.00%	0	24
2	Somewhat satisfied	48.78%	20	51.22%	21	0.00%	0	41
3	Neither satisfied nor dissatisfied	53.85%	14	46.15%	12	0.00%	0	26
4	Somewhat dissatisfied	75.00%	3	25.00%	1	0.00%	0	4
5	Extremely dissatisfied	0.00%	0	0.00%	0	0.00%	0	0

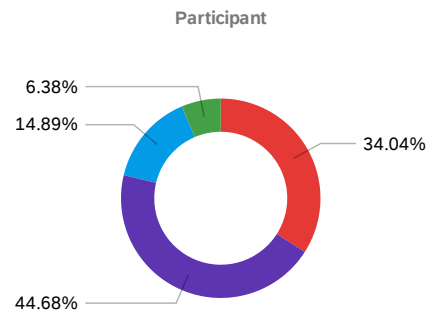
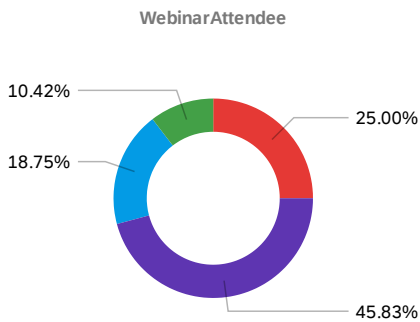
Showing rows 1 - 5 of 5



Q31 - How satisfied are you with how the Forum addressed this goal: To provide a platform for engagement with the project



■ Extremely satisfied  
 ■ Somewhat satisfied  
 ■ Neither satisfied nor dissatisfied  
 ■ Somewhat dissatisfied  
 ■ Extremely dissatisfied



**WebinarRegistrantDidNotAttend**

NO DATA

■ Extremely satisfied  
 ■ Somewhat satisfied  
 ■ Neither satisfied nor dissatisfied  
 ■ Somewhat dissatisfied  
 ■ Extremely dissatisfied

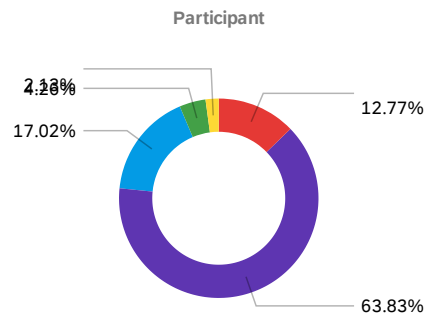
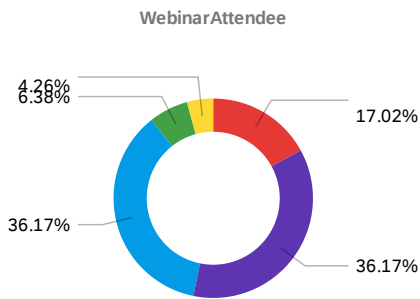
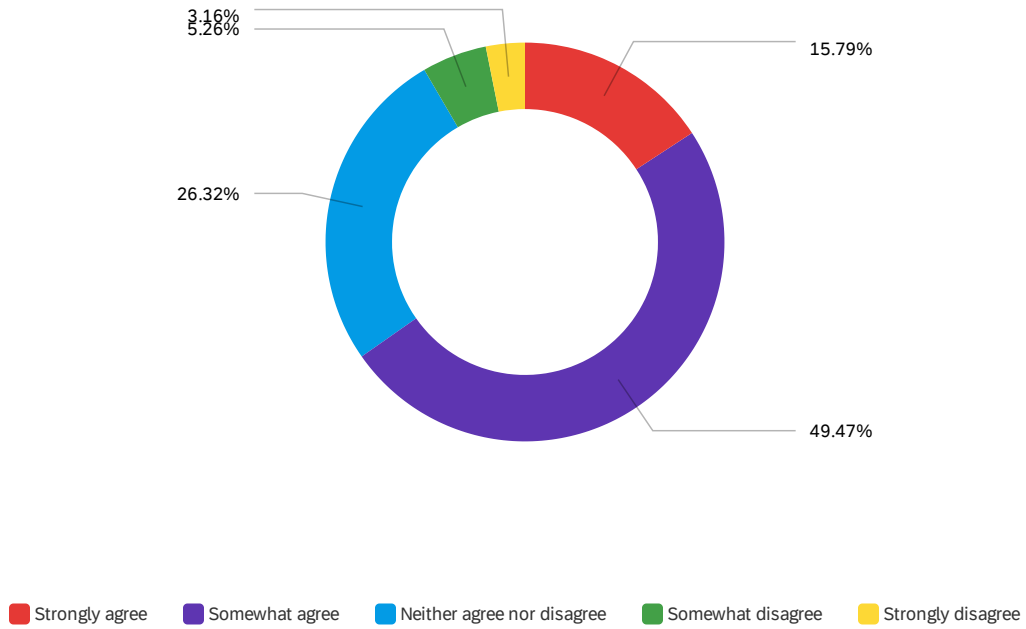
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	4.00	2.15	0.91	0.83	48

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
2	Participant	1.00	4.00	1.94	0.86	0.74	47

#	Field	WebinarAttendee		Participant		WebinarRegistrantDidNotAttend		Total
1	Extremely satisfied	42.86%	12	57.14%	16	0.00%	0	28
2	Somewhat satisfied	51.16%	22	48.84%	21	0.00%	0	43
3	Neither satisfied nor dissatisfied	56.25%	9	43.75%	7	0.00%	0	16
4	Somewhat dissatisfied	62.50%	5	37.50%	3	0.00%	0	8
5	Extremely dissatisfied	0.00%	0	0.00%	0	0.00%	0	0

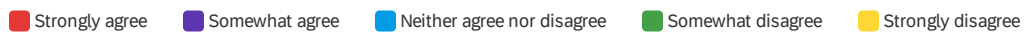
Showing rows 1 - 5 of 5

Q36 - The Lighting the Way Forum has better prepared me to improve archival discovery/delivery at my organization.



WebinarRegistrantDidNotAttend

NO DATA



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	11.00	15.00	12.45	0.99	0.97	47

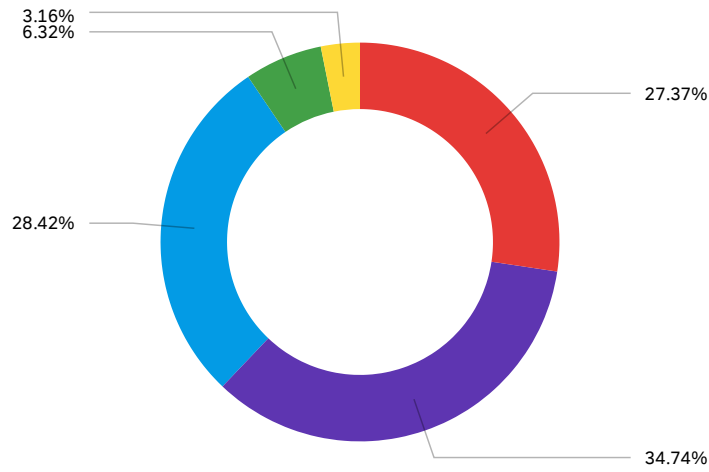
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
2	Participant	11.00	15.00	12.19	0.79	0.62	47

#	Field	WebinarAttendee		Participant		WebinarRegistrantDidNotAttend		Total
11	Strongly agree	57.14%	8	42.86%	6	0.00%	0	14
12	Somewhat agree	36.17%	17	63.83%	30	0.00%	0	47
13	Neither agree nor disagree	68.00%	17	32.00%	8	0.00%	0	25
14	Somewhat disagree	60.00%	3	40.00%	2	0.00%	0	5
15	Strongly disagree	66.67%	2	33.33%	1	0.00%	0	3

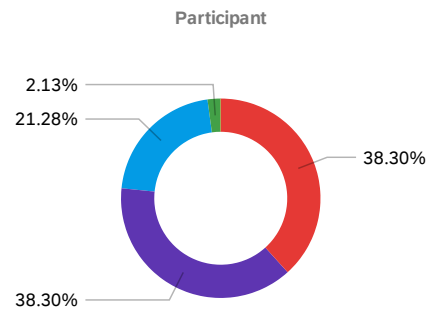
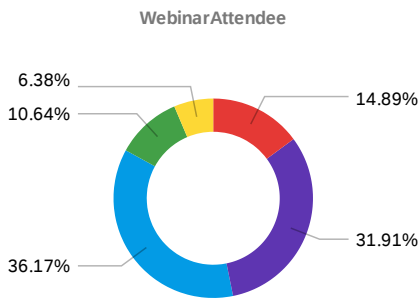
Showing rows 1 - 5 of 5

# Q42 - The Lighting the Way Forum has better prepared me to collaborate with people

across different roles/professional fields.



■ Strongly agree   
 ■ Somewhat agree   
 ■ Neither agree nor disagree   
 ■ Somewhat disagree   
 ■ Strongly disagree



WebinarRegistrantDidNotAttend

NO DATA

■ Strongly agree   
 ■ Somewhat agree   
 ■ Neither agree nor disagree   
 ■ Somewhat disagree   
 ■ Strongly disagree

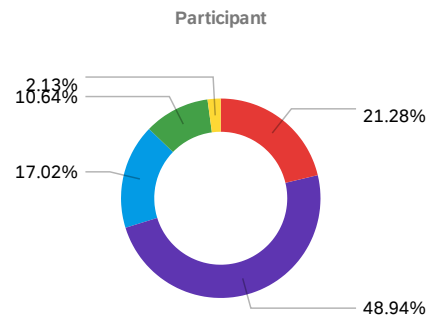
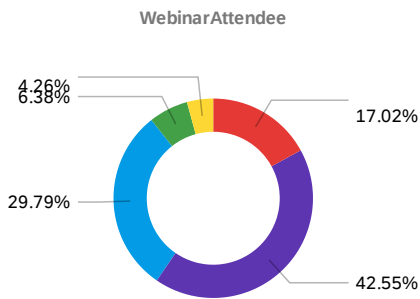
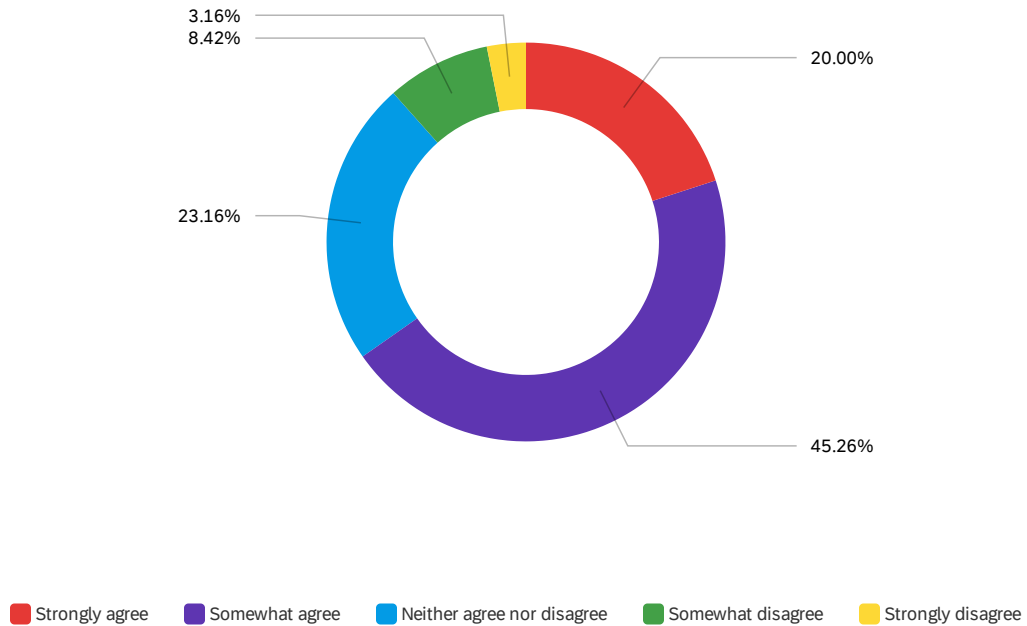
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	11.00	15.00	12.62	1.06	1.13	47

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
2	Participant	11.00	14.00	11.87	0.82	0.66	47

#	Field	WebinarAttendee	Participant	WebinarRegistrantDidNotAttend	Total
11	Strongly agree	28.00% 7	72.00% 18	0.00% 0	25
12	Somewhat agree	45.45% 15	54.55% 18	0.00% 0	33
13	Neither agree nor disagree	62.96% 17	37.04% 10	0.00% 0	27
14	Somewhat disagree	83.33% 5	16.67% 1	0.00% 0	6
15	Strongly disagree	100.00% 3	0.00% 0	0.00% 0	3

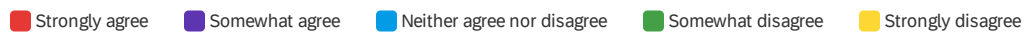
Showing rows 1 - 5 of 5

Q37 - The Lighting the Way Forum helped me grow my expertise to improve archival discovery/delivery for the communities my organization serves.



WebinarRegistrantDidNotAttend

NO DATA



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	11.00	15.00	12.38	0.98	0.96	47

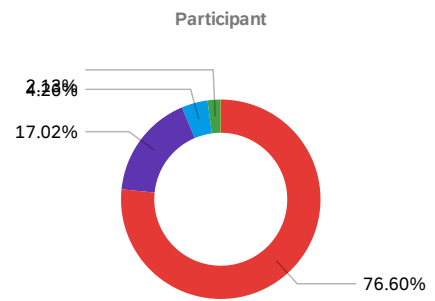
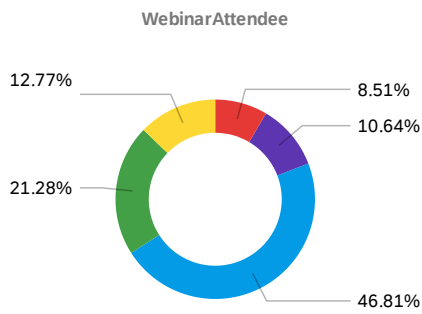
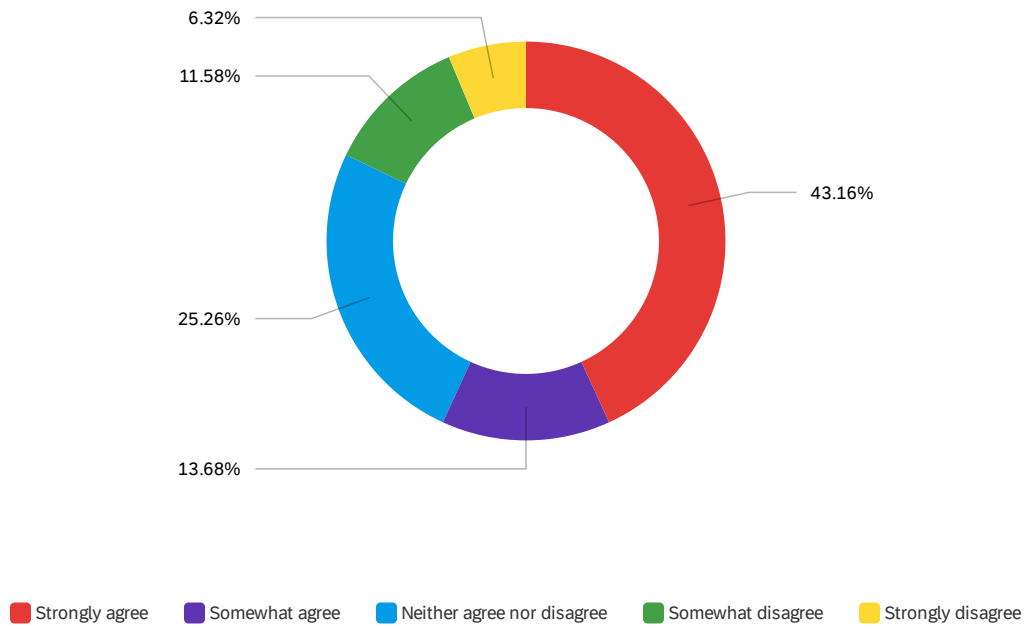
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
2	Participant	11.00	15.00	12.23	0.97	0.95	47

#	Field	WebinarAttendee		Participant		WebinarRegistrantDidNotAttend		Total
11	Strongly agree	44.44%	8	55.56%	10	0.00%	0	18
12	Somewhat agree	46.51%	20	53.49%	23	0.00%	0	43
13	Neither agree nor disagree	63.64%	14	36.36%	8	0.00%	0	22
14	Somewhat disagree	37.50%	3	62.50%	5	0.00%	0	8
15	Strongly disagree	66.67%	2	33.33%	1	0.00%	0	3

Showing rows 1 - 5 of 5

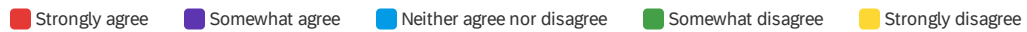


# Q38 - The Lighting the Forum was a valuable networking opportunity.



WebinarRegistrantDidNotAttend

NO DATA

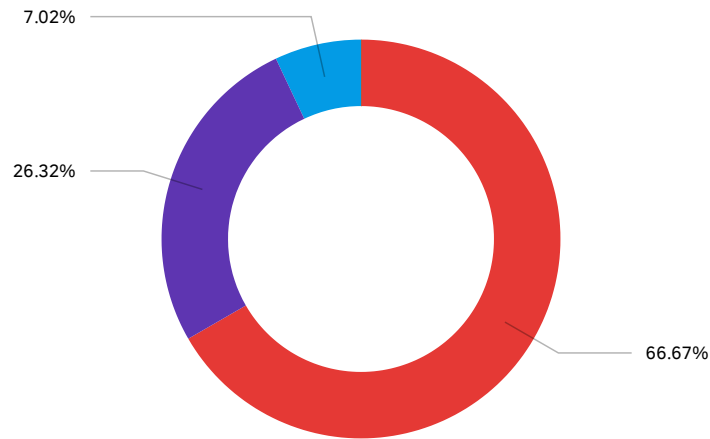


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	11.00	15.00	13.19	1.06	1.13	47
2	Participant	11.00	14.00	11.32	0.66	0.43	47

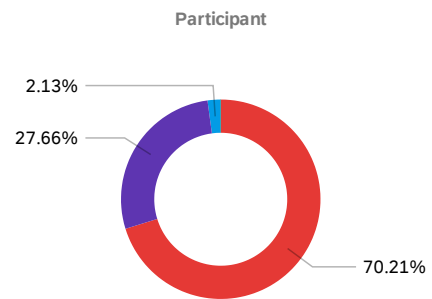
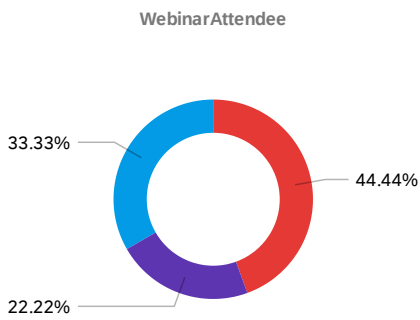
#	Field	WebinarAttendee	Participant	WebinarRegistrantDidNotAttend	Total
11	Strongly agree	10.00% 4	90.00% 36	0.00% 0	40
12	Somewhat agree	38.46% 5	61.54% 8	0.00% 0	13
13	Neither agree nor disagree	91.67% 22	8.33% 2	0.00% 0	24
14	Somewhat disagree	90.91% 10	9.09% 1	0.00% 0	11
15	Strongly disagree	100.00% 6	0.00% 0	0.00% 0	6

Showing rows 1 - 5 of 5

# EA1 - How satisfied were you with the following: Venue



■ Extremely satisfied   
 ■ Somewhat satisfied   
 ■ Neither satisfied nor dissatisfied   
 ■ Somewhat dissatisfied   
 ■ Extremely dissatisfied



**WebinarRegistrantDidNotAttend**

NO DATA

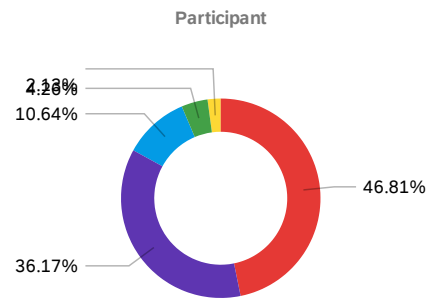
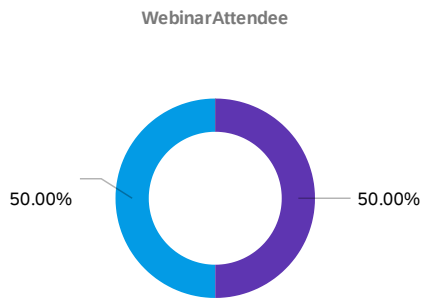
■ Extremely satisfied   
 ■ Somewhat satisfied   
 ■ Neither satisfied nor dissatisfied   
 ■ Somewhat dissatisfied   
 ■ Extremely dissatisfied

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	3.00	1.89	0.87	0.77	9
2	Participant	1.00	3.00	1.32	0.51	0.26	47

#	Field	WebinarAttendee	Participant	WebinarRegistrantDidNotAttend	Total
1	Extremely satisfied	10.81% 4	89.19% 33	0.00% 0	37
2	Somewhat satisfied	13.33% 2	86.67% 13	0.00% 0	15
3	Neither satisfied nor dissatisfied	75.00% 3	25.00% 1	0.00% 0	4
4	Somewhat dissatisfied	0.00% 0	0.00% 0	0.00% 0	0
5	Extremely dissatisfied	0.00% 0	0.00% 0	0.00% 0	0

Showing rows 1 - 5 of 5

# EA2 - How satisfied were you with the following: Food



**WebinarRegistrantDidNotAttend**  
NO DATA

■ Extremely satisfied   
 ■ Somewhat satisfied   
 ■ Neither satisfied nor dissatisfied   
 ■ Somewhat dissatisfied   
 ■ Extremely dissatisfied

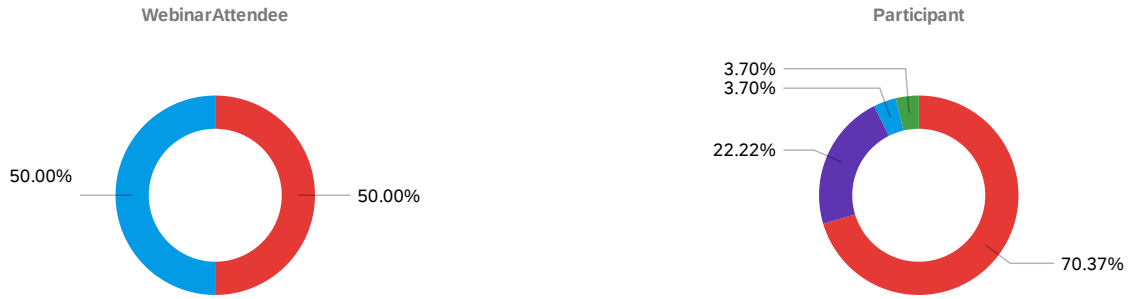
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	2.00	3.00	2.50	0.50	0.25	2
2	Participant	1.00	5.00	1.79	0.94	0.89	47

#	Field	WebinarAttendee		Participant		WebinarRegistrantDidNotAttend		Total
1	Extremely satisfied	0.00%	0	100.00%	22	0.00%	0	22
2	Somewhat satisfied	5.56%	1	94.44%	17	0.00%	0	18
3	Neither satisfied nor dissatisfied	16.67%	1	83.33%	5	0.00%	0	6
4	Somewhat dissatisfied	0.00%	0	100.00%	2	0.00%	0	2
5	Extremely dissatisfied	0.00%	0	100.00%	1	0.00%	0	1

Showing rows 1 - 5 of 5

# EA3 - How satisfied were you with the following: Lodging (Cardinal Hotel/Schwab

Residential Center, booked by project team)



WebinarRegistrantDidNotAttend

NO DATA

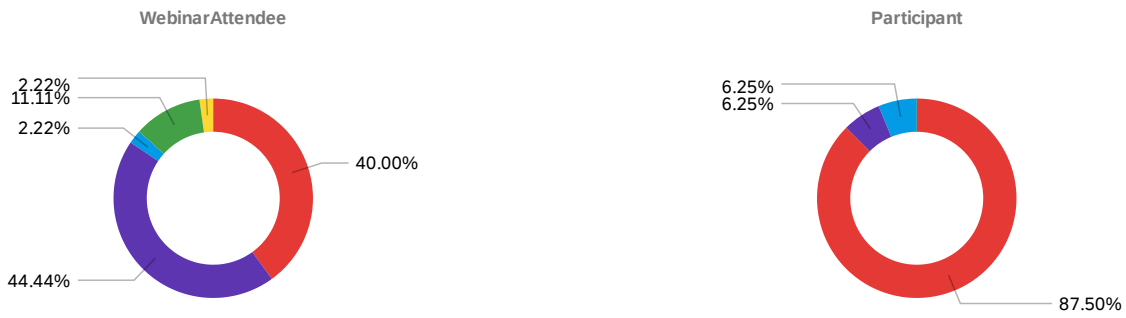
■ Extremely satisfied   
 ■ Somewhat satisfied   
 ■ Neither satisfied nor dissatisfied   
 ■ Somewhat dissatisfied   
 ■ Extremely dissatisfied

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	3.00	2.00	1.00	1.00	2
2	Participant	1.00	4.00	1.41	0.73	0.54	27

#	Field	WebinarAttendee		Participant		WebinarRegistrantDidNotAttend		Total
1	Extremely satisfied	5.00%	1	95.00%	19	0.00%	0	20
2	Somewhat satisfied	0.00%	0	100.00%	6	0.00%	0	6
3	Neither satisfied nor dissatisfied	50.00%	1	50.00%	1	0.00%	0	2
4	Somewhat dissatisfied	0.00%	0	100.00%	1	0.00%	0	1
5	Extremely dissatisfied	0.00%	0	0.00%	0	0.00%	0	0

Showing rows 1 - 5 of 5

# EA4 - How satisfied were you with the following: Audiovisual/Livestream



WebinarRegistrantDidNotAttend

NO DATA

■ Extremely satisfied  
 ■ Somewhat satisfied  
 ■ Neither satisfied nor dissatisfied  
 ■ Somewhat dissatisfied  
 ■ Extremely dissatisfied

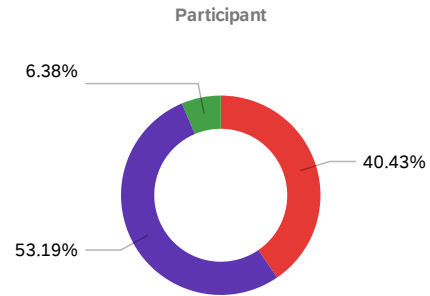
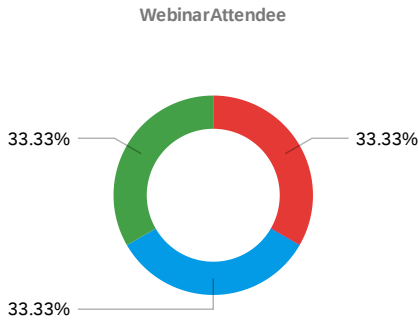
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	5.00	1.91	1.03	1.06	45
2	Participant	1.00	3.00	1.19	0.53	0.28	16

#	Field	WebinarAttendee	Participant	WebinarRegistrantDidNotAttend	Total
1	Extremely satisfied	56.25% 18	43.75% 14	0.00% 0	32
2	Somewhat satisfied	95.24% 20	4.76% 1	0.00% 0	21
3	Neither satisfied nor dissatisfied	50.00% 1	50.00% 1	0.00% 0	2
4	Somewhat dissatisfied	100.00% 5	0.00% 0	0.00% 0	5
5	Extremely dissatisfied	100.00% 1	0.00% 0	0.00% 0	1

Showing rows 1 - 5 of 5

# EA5 - How satisfied were you with the following: Facilitated activities (e.g. TRIZ,

Speedboat, etc.)



WebinarRegistrantDidNotAttend

NO DATA

■ Extremely satisfied   
 ■ Somewhat satisfied   
 ■ Neither satisfied nor dissatisfied   
 ■ Somewhat dissatisfied   
 ■ Extremely dissatisfied

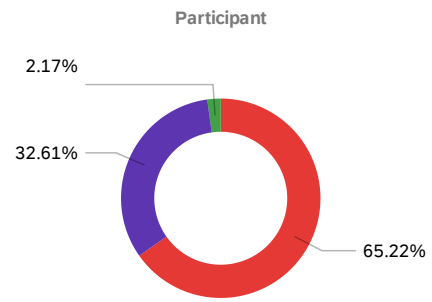
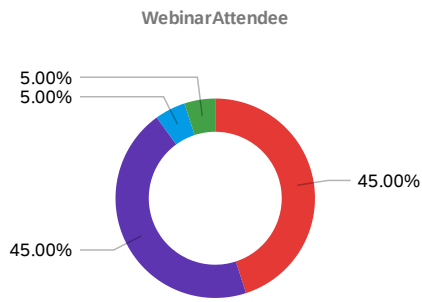
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	4.00	2.67	1.25	1.56	3
2	Participant	1.00	4.00	1.72	0.76	0.58	47

#	Field	WebinarAttendee	Participant	WebinarRegistrantDidNotAttend	Total
1	Extremely satisfied	5.00% 1	95.00% 19	0.00% 0	20
2	Somewhat satisfied	0.00% 0	100.00% 25	0.00% 0	25
3	Neither satisfied nor dissatisfied	100.00% 1	0.00% 0	0.00% 0	1
4	Somewhat dissatisfied	25.00% 1	75.00% 3	0.00% 0	4
5	Extremely dissatisfied	0.00% 0	0.00% 0	0.00% 0	0

Showing rows 1 - 5 of 5



# EA6 - How satisfied were you with the following: Plenary presentations (Day 1 only)



WebinarRegistrantDidNotAttend

NO DATA

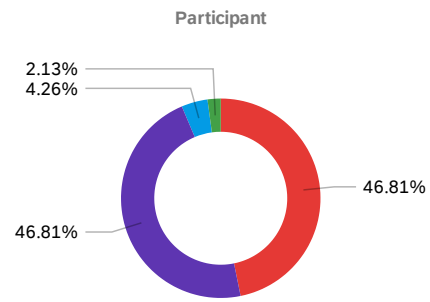
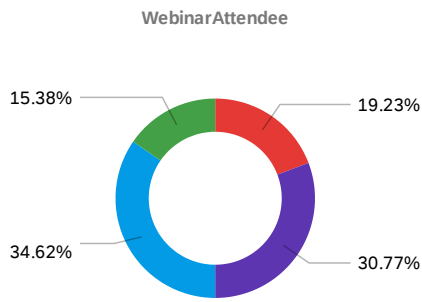
■ Extremely satisfied  
 ■ Somewhat satisfied  
 ■ Neither satisfied nor dissatisfied  
 ■ Somewhat dissatisfied  
 ■ Extremely dissatisfied

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	4.00	1.70	0.78	0.61	40
2	Participant	1.00	4.00	1.39	0.61	0.37	46

#	Field	WebinarAttendee	Participant	WebinarRegistrantDidNotAttend	Total
1	Extremely satisfied	37.50% 18	62.50% 30	0.00% 0	48
2	Somewhat satisfied	54.55% 18	45.45% 15	0.00% 0	33
3	Neither satisfied nor dissatisfied	100.00% 2	0.00% 0	0.00% 0	2
4	Somewhat dissatisfied	66.67% 2	33.33% 1	0.00% 0	3
5	Extremely dissatisfied	0.00% 0	0.00% 0	0.00% 0	0

Showing rows 1 - 5 of 5

# EA7 - How satisfied were you with the following: Length of forum



WebinarRegistrantDidNotAttend

NO DATA

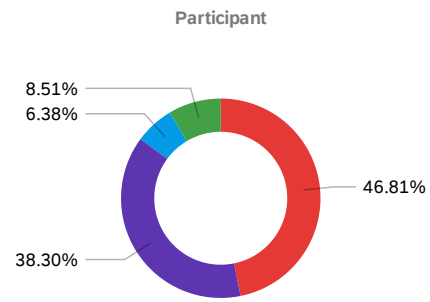
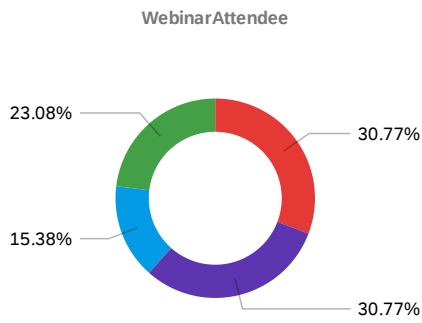
■ Extremely satisfied  
 ■ Somewhat satisfied  
 ■ Neither satisfied nor dissatisfied  
 ■ Somewhat dissatisfied  
 ■ Extremely dissatisfied

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	4.00	2.46	0.97	0.94	26
2	Participant	1.00	4.00	1.62	0.67	0.45	47

#	Field	WebinarAttendee	Participant	WebinarRegistrantDidNotAttend	Total
1	Extremely satisfied	18.52% 5	81.48% 22	0.00% 0	27
2	Somewhat satisfied	26.67% 8	73.33% 22	0.00% 0	30
3	Neither satisfied nor dissatisfied	81.82% 9	18.18% 2	0.00% 0	11
4	Somewhat dissatisfied	80.00% 4	20.00% 1	0.00% 0	5
5	Extremely dissatisfied	0.00% 0	0.00% 0	0.00% 0	0

Showing rows 1 - 5 of 5

# EA8 - How satisfied were you with the following: Length of breaks



WebinarRegistrantDidNotAttend

NO DATA

■ Extremely satisfied  
 ■ Somewhat satisfied  
 ■ Neither satisfied nor dissatisfied  
 ■ Somewhat dissatisfied  
 ■ Extremely dissatisfied

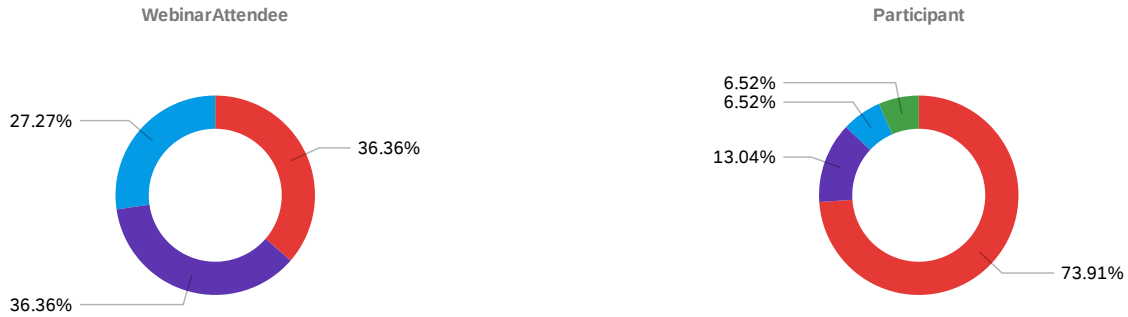
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	4.00	2.31	1.14	1.29	13
2	Participant	1.00	4.00	1.77	0.90	0.82	47

#	Field	WebinarAttendee		Participant		WebinarRegistrantDidNotAttend		Total
1	Extremely satisfied	15.38%	4	84.62%	22	0.00%	0	26
2	Somewhat satisfied	18.18%	4	81.82%	18	0.00%	0	22
3	Neither satisfied nor dissatisfied	40.00%	2	60.00%	3	0.00%	0	5
4	Somewhat dissatisfied	42.86%	3	57.14%	4	0.00%	0	7
5	Extremely dissatisfied	0.00%	0	0.00%	0	0.00%	0	0

Showing rows 1 - 5 of 5

# EA9 - How satisfied were you with the following: Logistics (including

registration/reimbursement)



WebinarRegistrantDidNotAttend

NO DATA

■ Extremely satisfied   
 ■ Somewhat satisfied   
 ■ Neither satisfied nor dissatisfied   
 ■ Somewhat dissatisfied   
 ■ Extremely dissatisfied

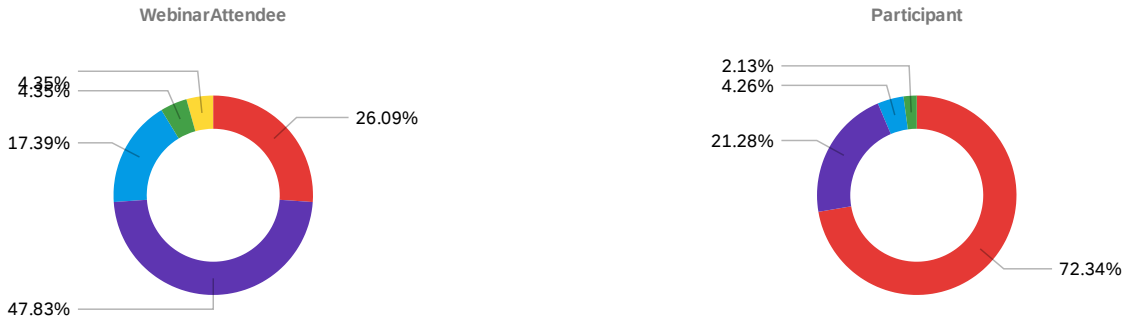
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	3.00	1.91	0.79	0.63	11
2	Participant	1.00	4.00	1.46	0.88	0.77	46

#	Field	WebinarAttendee	Participant	WebinarRegistrantDidNotAttend	Total
1	Extremely satisfied	10.53% 4	89.47% 34	0.00% 0	38
2	Somewhat satisfied	40.00% 4	60.00% 6	0.00% 0	10
3	Neither satisfied nor dissatisfied	50.00% 3	50.00% 3	0.00% 0	6
4	Somewhat dissatisfied	0.00% 0	100.00% 3	0.00% 0	3
5	Extremely dissatisfied	0.00% 0	0.00% 0	0.00% 0	0

Showing rows 1 - 5 of 5

# EA10 - How satisfied were you with the following: Inclusiveness of the forum (active

facilitation, Community Agreements, Code of Conduct, travel support)



WebinarRegistrantDidNotAttend

NO DATA

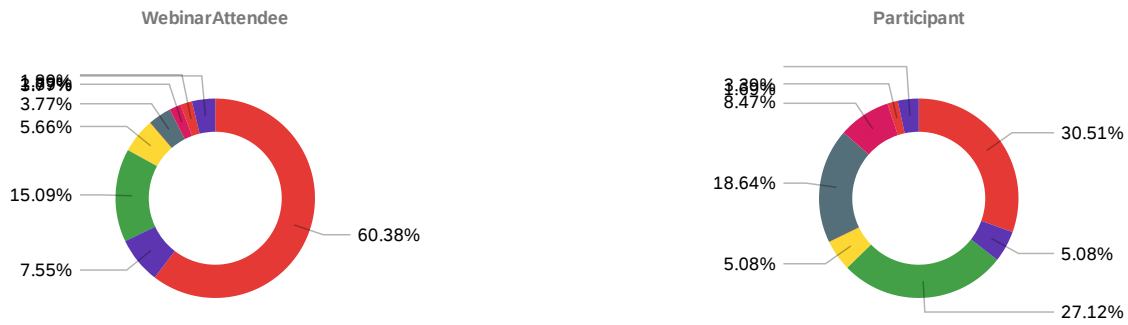
■ Extremely satisfied   
 ■ Somewhat satisfied   
 ■ Neither satisfied nor dissatisfied   
 ■ Somewhat dissatisfied   
 ■ Extremely dissatisfied

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	5.00	2.13	0.99	0.98	23
2	Participant	1.00	4.00	1.36	0.67	0.44	47

#	Field	WebinarAttendee		Participant		WebinarRegistrantDidNotAttend		Total
1	Extremely satisfied	15.00%	6	85.00%	34	0.00%	0	40
2	Somewhat satisfied	52.38%	11	47.62%	10	0.00%	0	21
3	Neither satisfied nor dissatisfied	66.67%	4	33.33%	2	0.00%	0	6
4	Somewhat dissatisfied	50.00%	1	50.00%	1	0.00%	0	2
5	Extremely dissatisfied	100.00%	1	0.00%	0	0.00%	0	1

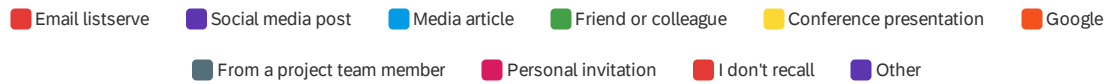
Showing rows 1 - 5 of 5

# Q14 - How did you hear about the Lighting the Way Forum? Select all that apply.



WebinarRegistrantDidNotAttend

NO DATA



#	Field	WebinarAttendee		Participant		WebinarRegistrantDidNotAttend		Total
1	Email listserve	64.00%	32	36.00%	18	0.00%	0	50
2	Social media post	57.14%	4	42.86%	3	0.00%	0	7
3	Media article	0.00%	0	0.00%	0	0.00%	0	0
4	Friend or colleague	33.33%	8	66.67%	16	0.00%	0	24
5	Conference presentation	50.00%	3	50.00%	3	0.00%	0	6
6	Google	0.00%	0	0.00%	0	0.00%	0	0
7	From a project team member	15.38%	2	84.62%	11	0.00%	0	13
8	Personal invitation	16.67%	1	83.33%	5	0.00%	0	6
16	I don't recall	50.00%	1	50.00%	1	0.00%	0	2
17	Other	50.00%	2	50.00%	2	0.00%	0	4

Showing rows 1 - 10 of 10

## Q14\_17\_TEXT - Other

WebinarAttendee

Other

NAFAN project

Other

SAA

Participant

Other

---

From two individuals (management level) at my institution involved in archival delivery/access/discovery projects.

First from someone attending DLF, then through email listservs

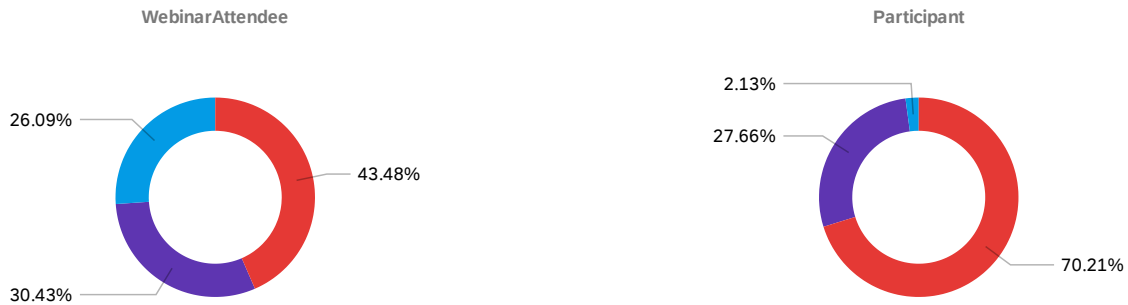
WebinarRegistrantDidNotAttend

Other

---

## Q22 - Would you be interested in further opportunities to participate in the Lighting the

Way project (e.g. writing case studies or giving feedback on project deliverables)?



WebinarRegistrantDidNotAttend

NO DATA

Yes Maybe No

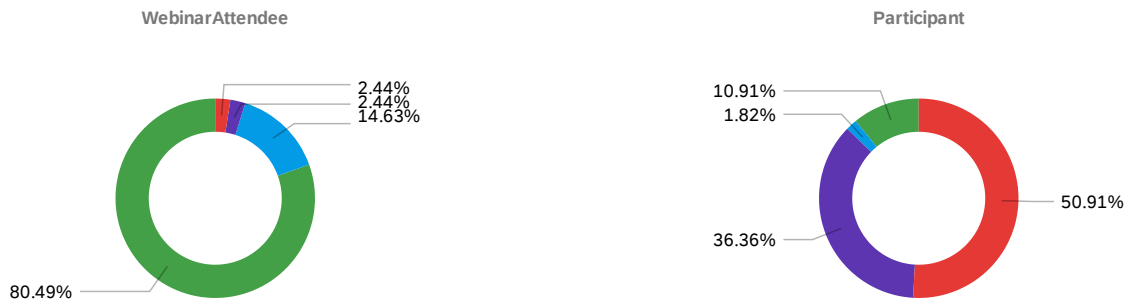
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	WebinarAttendee	1.00	3.00	1.83	0.82	0.67	46
2	Participant	1.00	3.00	1.32	0.51	0.26	47

#	Field	WebinarAttendee	Participant	WebinarRegistrantDidNotAttend	Total
1	Yes	37.74% 20	62.26% 33	0.00% 0	53
2	Maybe	51.85% 14	48.15% 13	0.00% 0	27
3	No	92.31% 12	7.69% 1	0.00% 0	13

Showing rows 1 - 3 of 3



## Q25 - Did you receive travel funding to participate in the Forum? (Select all that apply)



### WebinarRegistrantDidNotAttend

NO DATA

■ I received travel funding from the Forum
 ■ I received travel funding from my employer
 ■ I did not receive travel funding
 ■ I did not need any travel funding

#	Field	WebinarAttendee		Participant		WebinarRegistrantDidNotAttend		Total
1	I received travel funding from the Forum	3.45%	1	96.55%	28	0.00%	0	29
2	I received travel funding from my employer	4.76%	1	95.24%	20	0.00%	0	21
3	I did not receive travel funding	85.71%	6	14.29%	1	0.00%	0	7
4	I did not need any travel funding	84.62%	33	15.38%	6	0.00%	0	39

Showing rows 1 - 4 of 4

**End of Report**