Society of American Archivists
Council Meeting
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Chicago, Illinois

Report: Task Force on Research/Data and Evaluation
(Prepared by Michelle Light, Chair)

BACKGROUND

The SAA Council charged the Task Force on Research/Data and Evaluation (TF-CORDE) to "determine whether sufficient need exists to justify the effort and costs associated with establishing a standing body to conduct, facilitate, and/or evaluate research that is meaningful for SAA and the archival community."

DISCUSSION

To better understand SAA's and SAA members' needs surrounding data and research, TF-CORDE developed personas. Personas are used in the field of human computer interaction to help designers better understand a user's goals, expectations, needs, and behaviors when interacting with a website or interface. Personas are fictional characters based on research about typical users. TF-CORDE believed that developing personas would help the the group surface patterns or needs across different types of archivists and would orient our recommendations toward satisfying demonstrated user needs. We used this method knowing that there are limitations to any approach that hypothesizes needs of SAA's members or the profession at large. However, we believe the personas are a starting point, but not a substitute, for engaging more users and their diverse requirements.

TF-CORDE developed personas for the following categories of users: SAA staff member, SAA leader, federal archivist, state or local archivist, tenure-track archivist, lone arranger, business archivist, new professional, and executive director of a small repository. TF-CORDE acknowledges that this list is not representative, but believed the categories would yield a variety of needs and perspectives to satisfy the spirit of the task force's charge. To develop each persona, TF-CORDE members interviewed three to five individuals about their data and research practices and needs. Each persona is a fictionalized composite of the three to five interviewees whose profiles represent common needs for that user category. (The personas will eventually be made available on the TF-CORDE microsite.)

Although each category surfaced individualized needs, we identified five common needs or patterns across the interviews:

1. Standardized tools for gathering and analyzing data

Users, as represented in the personas, desired standardized survey or measurement tools they could use to gather data about several archival functions, including public service interactions (e.g., patron and use data, social media interactions) and collection management activities (e.g., processing rates, digitization rates). They wanted to use standardized tools so they could benchmark their institution in comparison to other similar institutions and so they could evaluate their own institution's performance or effectiveness over time. They also wanted to use a standardized tool so they did not have to invent one on their own. Many were unsure about how to query users, how to gather more data points to assist with advocacy efforts, or how to gather data to analyze archival processing. They were looking for out-of-the-box tools they could use to gather and analyze data.

2. Centralized repository of data, tools, and other authoritative aids

Users desired a centralized, online repository where they could find and/or contribute data and resources that other archivists could use.

- Users described a central repository that would house data from large-scale, historical surveys so that data relating to archives could be found in one place and be assigned stable URLs.
- Users wanted to see more data or statistics from other institutions so they could better evaluate their own institutions, make improvements, and write grants.
- Users expressed a desire for access to the raw data from published research products, data from salary surveys, and data from other smaller surveys or research.
- Users also wanted to look in one place to find other types of trustworthy information about archival practice at other institutions, such as policies, procedures, forms, manuals, testimonials and stories that could be used for advocacy, and more from a variety of institutions.
- Some users work in organizations that operate internationally and/or in a multilingual environment and expressed interest in pointers to research published about practices in other countries or in other languages.
- Users described an online environment that would be managed by archivists for archivists with a crowd-sourced approach to curation.

3. Training on gathering, analyzing, interpreting, and using data

Most users did not feel confident that they know enough about how to create surveys, conduct research, gather valid data, and analyze and use data. Most wanted to create, capture, and share more data, but did not have the knowledge, tools, or technological resources to start. They

wanted more training in this area. Several users also wanted to learn more about how to use data to make a case, advocate for more resources, or to make improvements. Most users had limited information technology resources at their institution and limited access to expertise in this area.

4. Up-to-date, basic facts and figures about archives and archivists

Users wanted to know basic facts about archives and archivists. They wanted SAA to manage a simple page or have a simple graphic with basic facts about archives and archivists. Some wanted to know basic facts about archives at a national level, while others wanted this information scoped to a regional level or to institutions of a similar type. Some wanted more information about archival salaries. Most wanted to use this information to advocate for more resources for their institution, but others wanted to provide this information to the press or advocacy groups. Several cited the rich data available about museums and libraries and wished something similar were possible for archives.

5. Clearinghouse to support archival surveys and research

Users wanted access to authoritative, high-quality tools and data. They wished to ensure their efforts at data gathering/analysis would be useful for themselves and their colleagues. Several expressed a desire for some sort of leadership, coordination, or oversight over the development and management of research projects and tools. Several users also appreciated how SAA component groups and SAA members have initiated surveys on timely topics. Users representing SAA Leaders and SAA Staff in particular wanted more coordination and incentive for members or groups to carry out these activities. For SAA to provide leadership in this area, users identified several needs for articulating priority areas or gaps for members or component groups to focus on, providing incentives for archival research, helping obtain funding for outside expertise to gather and analyze data, coordinating the work of groups or individuals with similar research interests, and vetting proposed surveys directed at SAA members to ensure quality.

Next steps:

- TF-CORDE will identify a research agenda.
- TF-CORDE will develop pilot projects to explore the feasibility of one or more of the models.
- TF-CORDE will review SAA's Facts and Figures web page.
- TF-CORDE will review possible models at other professional organizations that might be implemented within SAA to address these identified needs.