

**Society of American Archivists  
Council Meeting  
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Chicago, Illinois**

**Proposal for a Committee on Research and Evaluation  
(Prepared by Immediate Past President Dennis Meissner)**

**BACKGROUND**

In my recent presidential address, I devoted a substantial section to outlining a broad vision for a new standing SAA committee that might be called the Committee on Research and Evaluation (CORE).

The point of CORE would be to provide a standing entity that would be responsible for conducting or facilitating research that is practical, meaningful, and useful for SAA and the archival community. It would strive to gather, manage, and surface quantitative and qualitative information of strategic value for advocacy, awareness, relevance, audience service, and community engagement.

**DISCUSSION**

At present we lack any persistent engine to champion, organize, prioritize, or resource the sorts of research efforts that can materially benefit SAA. As a result, while we may have many projects going on in members' repositories or in professional collaborations that produce useful results, we lack a means to approach them strategically so as to achieve results that are cumulative or that provide models for members to adopt.

CORE could function as a center for conducting and evaluating research that is practical, meaningful, and useful. CORE could gather quantitative and qualitative information of strategic value for our efforts relating to advocacy, public awareness, improved audience service, and community engagement. CORE would evaluate this information and surface it to members via dashboards, reports, and constructed data sets that members can use to better understand and act upon their own environments.

Allied professional associations are already embarking on this sort of effort. The American Library Association has its Office for Research and Statistics, whose mission is to “provide leadership and expert advice to ALA staff, members and public on all matters related to research and statistics about libraries, librarians and other library staff.”

Similarly the Alliance of American Museums has its central Research Program, whose goal is to “provide sound and current data to support the Alliance, its members and the museum field.” They both conduct and commission original research about America's libraries and museums, collect and synthesize benchmarking data, monitor external research, and collaborate with other organizations on research projects of interest to their members and their professions.

By creating standing research arms within their operating structures, these associations have positioned themselves to commission, gather, and evaluate information that is critical for their members in serving their audiences better, demonstrating their value to society, and expanding their professional knowledge base.

A standing committee devoted to a larger research agenda could do several things for SAA:

- Engage academic and other communities within SAA to perform research by utilizing grants, fellowships, conferences, and other tools and levers;
- Provide a repository and analytical tools for sharing and evaluating useful data about archivists, repositories, audiences, and the environments in which archives function;
- Build a training site for archivists in the area of business intelligence;
- Provide a mechanism that can proactively commission necessary and strategic research, rather than passively waiting for it to occur on its own; and
- Develop a persistent team of SAA members that is positioned to look strategically at the organization’s information needs.

Attached to this agenda item is a brief concept document that explains what CORE might achieve and how it could be organized.

### **QUESTIONS FOR DISCUSSION**

- Is there a sufficient need for a standing committee along the lines summarized in this document?
- Does SAA have the capacity to add this to its existing operations?
- If such a committee is established, how should its leaders/members (at the high level) be selected?
- Is there a natural connection between CORE and the SAA Foundation?

# Committee on Research and Evaluation: A Conceptual Framework

## Overview

We are committed to conducting and evaluating research that is practical, meaningful, and useful. CORE gathers quantitative and qualitative information of strategic value for advocacy, awareness, relevance, audience service, and community engagement. CORE evaluates this information and surfaces it to members in dashboards, reports, and data sets that members can use to better understand and act upon their environments.

Being part of a professional association that serves archivists employed by the great majority of U.S. archival repositories gives us both a gateway to captured and uncaptured data and the unique opportunity to survey, test, and evaluate a comprehensive population of archivists. To every extent possible, we share the results of our studies so that others can learn from them and so that our profession can remain strong and vibrant.

CORE's work is guided by these values:

- Objective research
- Strategic importance
- Collaborative approaches
- Shared knowledge

CORE organizes itself dynamically into research teams that study particular strategic problems of broad interest and relevance to SAA members. These teams are collaborative and drawn from across the membership. The teams work in partnership, sharing data, methods, insights, and personnel. Teams form and disband as required by their projects.

Some CORE teams may be very academic in terms of their objectives, approaches, and personnel. They will work on problems and methods that demand scholastic rigor. Others may focus on very pragmatic and businesslike projects intended to move quickly toward a practical solution or understanding on some more immediate issue.

CORE teams may receive modest funding from SAA operating funds, from the SAA Foundation, or from external sources. All funding is negotiated with and authorized by the SAA Council as part of the annual budgeting process.

## Potential Structure

**CORE Committee.** A small standing committee, appointed by the SAA Council, is augmented with the leaders of each of the existing project teams. Its membership must comprise the expertise necessary to imagine and to manage a robust agenda of research, assessment, and business intelligence that serves the changing needs and strategic agendas of the association.

<b>CORE Committee</b> (standing committee augmented with leaders of project teams)				
P	P	P	P	P
R	R	R	R	R
O	O	O	O	O
J	J	J	J	J
E	E	E	E	E
C	C	C	C	C
T	T	T	T	T
1	2	3	4	5

**Project Teams.** Each of the project teams is a dynamic entity, forming as the need arises and disbanding upon the completion of its mission. Some teams will be very short in duration; others may function for a number of years. A team is enabled and defined by a formal charter that establishes its composition, its purpose, its governance, its deliverables, and its critical path. Each team is represented on the CORE Committee, which oversees its work and ensures collaboration and communication among the projects and with the Council.

## Administration and Governance

**Oversight and Reporting.** As it ramps up, CORE will represent a large and complicated structure probably analogous to the Standards Committee. As such, it will require continuous Council scrutiny which in turn requires regular, formal communication up the chain. It probably makes sense for the project teams to report out to the CORE Committee in advance of each Council meeting, so that a substantial summary report of all current CORE work can be presented to the Council at each of its meetings. Each project team would submit a formal annual report to the Council, as would CORE itself.

**CORE Agenda and Work Plan.** To be truly effective, CORE should be both proactive and reactive. The SAA Council, staff, committees, and sections might all recommend a project of any scope or duration, and CORE must be able to work with that group to evaluate the recommendation's potential, recommend a plan of action, charter a project, and then manage the resulting endeavor. But by virtue of its mission and personnel, CORE will be well positioned and resourced to imagine and recommend projects of strategic importance on its own. All potential projects will involve expending scarce resources---time, money, energy, and organizational focus. Therefore, all projects ultimately must be negotiated with and approved by the Council.

## CORE Products and Services

The purpose of CORE is to create an accumulating catalog of products and services that provide real benefits to SAA and its members. Those might include information resources, learning tools, actionable data stores, collaborative spaces, and similar things.

The goal should be to create strategic value for SAA, to enhance the professional capability of SAA members, to serve the needs of SAA component groups, and to increase the effectiveness of archivists in their workplaces and in the larger society.

Most of the end-products of CORE projects might be delivered via a very robust online structure. A CORE microsite might comprise several elements:

- A collaborative workspace for teams;
- Information on projects in progress;
- Reports from completed research projects;
- Resources on evaluation and business intelligence for SAA members;
- Dashboard data resulting from past and current work; and
- A portal to access data sets accumulated by research teams.