Society of American Archivists
Committee on Research, Data, and Assessment
Annual Report to Council 2020-2021
Prepared by Jennifer Gunter King and Erin Passehl -Stoddart, Co-Chairs

"Practice, education, and research. Each informs the other, each can—and should—improve the other, each is critically important to a profession's growth and development." – former Executive Director Nancy Beaumont.

The [SAA Committee on Research, Data, and Assessment](#) (CORDA) is dedicated to establishing a coherent set of resources and infrastructure that supports and strengthens research and innovation in the archives profession. Chartered and formed in 2019, CORDA "provides access to significant and useful data and research about SAA, American archives, and their users that evidence the value of archives for society and help us improve our services to SAA members and to our consumers. The Committee will work to conduct or support relevant research and to create, gather, and preserve data by directing and engaging in several areas of activity:
- Providing SAA members with standardized tools for gathering and analyzing data;
- Providing a repository or portal for data and other research outputs;
- Providing training on gathering, analyzing, interpreting, and using data; and
- Providing up-to-date and reliable basic facts and figures about archives and archivists." [1]

2020-2021 Accomplishments:

SAA Dataverse
The CORDA Data Repository team consisted of Erin Passehl Stoddart (team lead), Paul Conway, Nance McGovern, Cristina Horak, and was later joined by Emily Lapworth and Mary Biddle. One of the original charges for CORDA was to "provide a repository or portal for data and other research outputs." The SAA Dataverse (https://dataverse.unc.edu/dataverse/saa) was established to support the needs and interests of SAA's members and the broader archives community, and to foster knowledge, insights, and a deeper understanding of archival organizations, the status of archivists, and the impact of archives and archival work. In fall 2020, CORDA collaborated with SAA Executive Director Nancy Beaumont and SAA Council to negotiate a Memorandum of Understanding (MOU) with the Odum Institute for Research in Social Science at the University of North Carolina at Chapel Hill to host the SAA Dataverse, which was finalized in January 2021.

In addition to the signed MOU, other recent developments this past year include celebrating the SAA Dataverse going live and being published in February 2021, with A*CENSUS I documentation serving as the inaugural dataset; and the development and adoption of the [SAA Dataverse Collection Development Policy](https://www2.archivists.org/governance-manual/saa-dataverse-collection-development-policy) (https://www2.archivists.org/governance-manual/saa-dataverse-collection-development-policy), which was presented for public comment at the SAA Dataverse Open House in February and formally approved by the SAA Council in March. The Collection Development Policy welcomes data created by the SAA community and allied organizations and individuals and includes guiding principles and a collecting focus section. CORDA drafted necessary policies in conjunction with the MOU, which were presented at one of the Conversation Lounges at the 2021 SAA Annual Meeting. These policies are currently referred to as "Version 1.0" with the idea that they will continue to be updated through an iterative process as more submissions are received and published. The policies

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are currently published and available in the SAA Dataverse at:
https://dataverse.unc.edu/dataset.xhtml?persistentId=doi:10.15139/S3/X4ZO8P. CORDA has a number of
datasets in the pipeline to be published, after which time we will open up submissions to the wider community.
CORDA plans to include a widget linking to the repository on the new SAA Facts and Figures website.

SAA Dataverse repository: https://dataverse.unc.edu/dataverse/saa

Assessment and Evaluation

The CORDA Assessment and Evaluation team was composed of Jennifer Gunter King (lead), Sarah Buchanan,
and Emily Lapworth. As a committee, CORDA prioritizes collaboration as a way to connect research, data and
assessment resources within the archival profession. Since forming in 2019, CORDA has undertaken several
efforts to "shake the tree." A 2019 survey surfaced possible data sets; with the SAA Dataverse now published
online, CORDA has datasets to test newly developed ingest policies, including the Privacy and Confidentiality
section's Access Restrictions survey from 2019 and the Collection Management Section's Collection
Management Tools survey from 2016.

CORDA sees its role as one that offers an "umbrella" for a number of critically related resources. CORDA has
launched a number of conversations to establish collaborative relationships that will serve to connect CORDA
with critical initiatives, as well as help CORDA coordinate resources that support research and innovation. Our
collaborative approach has been appreciated, and through the generosity of colleagues, we have established
relationships with the following SAA initiatives:
- A*CENSUS II: Beth Myers, Chair, A*CENSUS II Working Group

CORDA Microsite: https://www2.archivists.org/groups/committee-on-research-data-and-assessment ; Email:
corda@archivists.org

- - CORDA members Erin Passehl Stoddart and Paul Conway serve on the A*CENSUS II Working Group
  - SAA Institutional Archives: Derek Webb, University of Wisconsin-Milwaukee
    - SAA archives will be promoted by CORDA as a valuable resource for research
  - *American Archivist*: Amy Cooper Cary and Teresa Brinati
    - The *American Archivist* editorial board is considering adding language to its communications with submitting authors that highlights submitting data to the SAA Dataverse
  - Council of State Archivists: Barbara Teague and Veronica Martzahl
    - The Council of State Archivists (CoSA) produces annual reports that are data-rich and are interested in contributing to the SAA Dataverse
  - REPO Data: Eira Tansey and Ben Goldman
    - REPO Data provides a foundation of repository-level information and needs infrastructure behind it to keep the data current and useful

Assessment and Evaluation also undertook an effort to streamline and clarify the "Research Agenda" drafted by the CORDE-Task Force. Renamed a "Research Roadmap" and building on the 2018 SAA annual meeting, which included an interactive post it opportunity to gather community feedback, CORDA has drafted Research Roadmap themes of:
- *Assessment:* Diversity and Demographic;
- *Evaluation:* Metrics and Institutions Maintenance, Sustainability, & Ethics;
- *Applied Research*: Inclusive Collaboration & Audience Building

2021-2022 will prioritize work on the Research Roadmap, as it holds a great deal of potential for supporting priorities that align with the SAA Strategic Plan, and being able to frame and present major research efforts, like A*CENSUS II, as part of a broader vision for strengthening the research that underpins archival practice and education.

Education and Outreach
The CORDA Education and Outreach team, composed of Sarah Pratt Martin (lead), Gwen Higgins, Paul Conway, and SAA Education Committee Liaison Carli Lowe, oversaw outreach and education programs that included:
- "Demystifying Data Analysis" survey (October 2020) and focus group (December 15, 2020) to solicit feedback regarding the workshop presented by CORDA at the 2020 Annual Meeting (August 2020). The responses and engagement has and will continue to inform future educational offerings.
- SAA Dataverse Open House on February 12, 2021, in conjunction with "Love Data" Week. The open house provided an opportunity for the profession to provide feedback and ask questions about the drafted Collection Development policy. https://www2.archivists.org/groups/committee-on-research-data-and-assessment/corda-open-house-on-saa-datavers
- "Research Basics for Archivists" webcast on the fundamentals of research and the research process within our field, with presenters Dr. Paul Conway, Dr. Nance McGovern, Jeremy York, Cal Lee, and Lydia Tang. This webcast went live on July 26, 2021, and was followed up with a Q&A educational session as part of the annual meeting, and also available for free in an ongoing fashion. More information at: https://archives2021.us2.pathable.com/meetings/cW8nuL6fZZauYnNKM and https://archives2021.us2.pathable.com/meetings/FfCWZ2Jbk6PC7chWh. A Qualtrics survey was shared

with attendees to solicit feedback from the SAA community on future educational offerings. As of August 31, the survey has received 18 responses that will be reviewed in depth in September 2021.

Facts and Figures Redesign

The Facts and Figures Redesign team, composed of Chris Marino and Dennis Meissner, ended the previous reporting period with a completed wireframe of the proposed microsite. The wireframe had been approved by CORDA and was ready to be translated into actual web pages.

Beginning in October, the team started working with SAA Webmaster Matt Black to design and build the microsite's numerous layered pages. Over the following six months they worked through several iterations before settling on a design that was visually uncluttered, satisfied usability requirements, and was extensible to accommodate growing content over the foreseeable future. Theythen spent the spring and early summer writing HTML code to populate Matt's high-level page templates with lower-level subpages, navigation buttons, and the initial set of content pieces. The next stage of work will be focused on locating and adding additional content pieces to the microsite, with a goal of a public launch in Fall 2021.
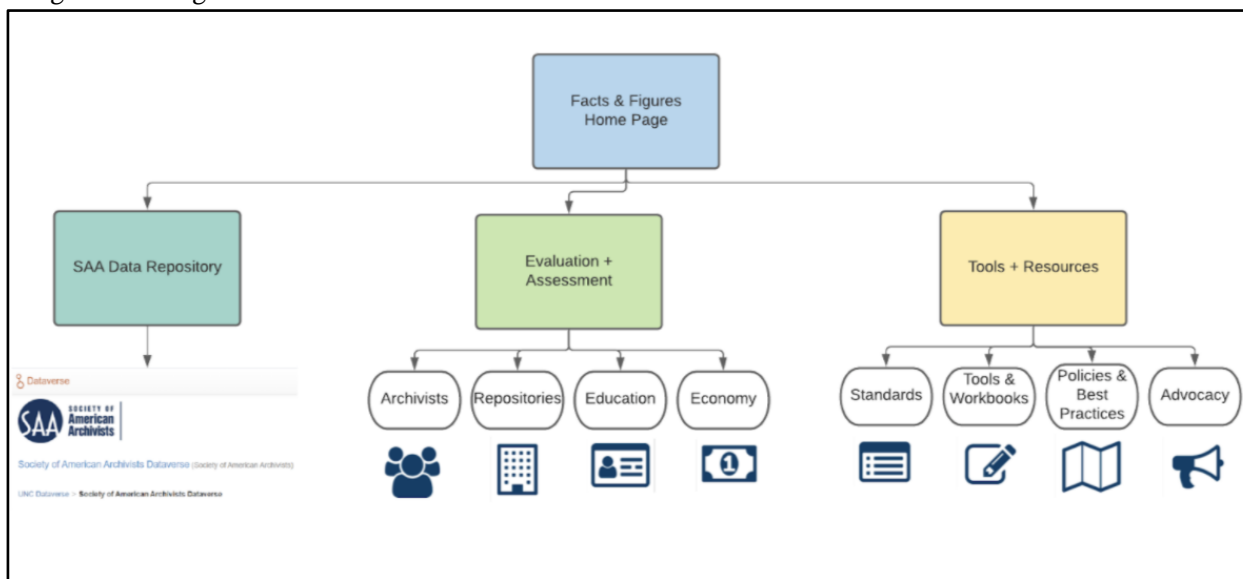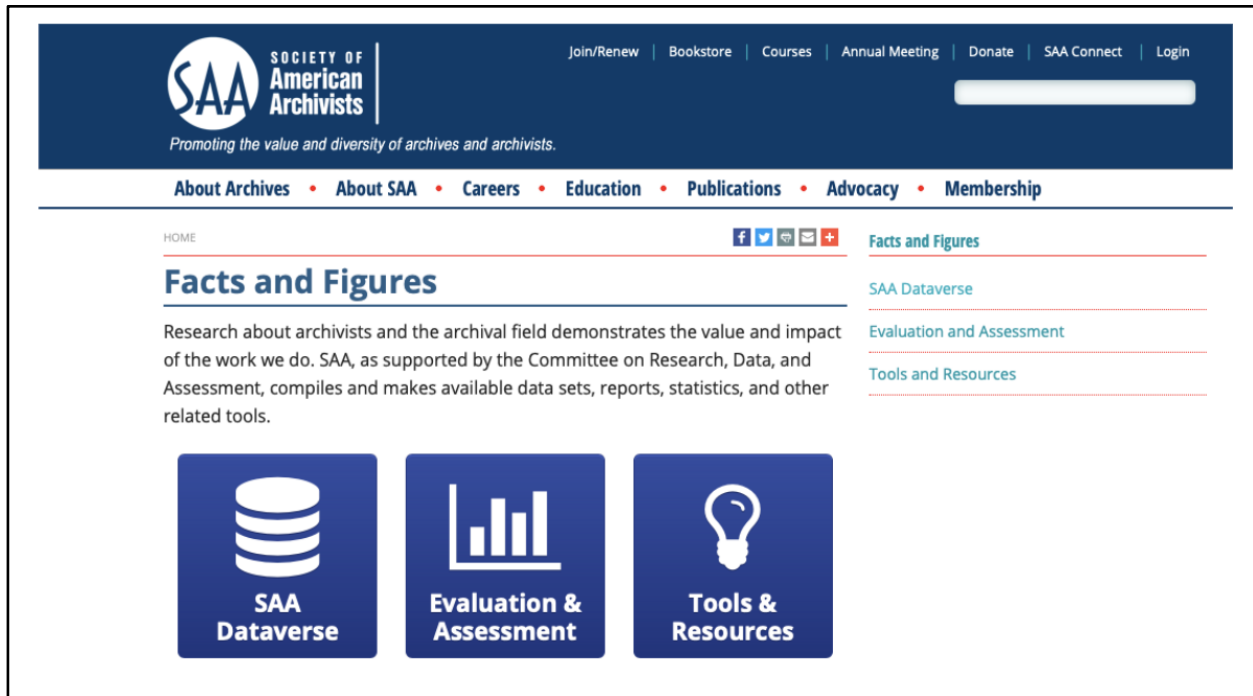
Image 1: Redesign

Image 2: Unpublished site

SAA Annual Meeting

CORDA Business Meeting
CORDA hosted an open business meeting on Monday, July 26, from 4:00-5:30 CST. There were approximately 30 people in attendance. We discussed the year's accomplishments and goals for next year.

Educational Webcast
"Research Basics for Archivists" webcast on the fundamentals of research and the research process within our field, with presenters Dr. Paul Conway, Dr. Nance McGovern, Jeremy York, Cal Lee, and Lydia Tang. This webcast went live on July 26, 2021, and was followed up with a Q&A educational session as part of the annual meeting, and also available for free in an ongoing fashion. More information at: https://archives2021.us2.pathable.com/meetings/cW8nuL6fZZauYnNKM and https://archives2021.us2.pathable.com/meetings/FfCWZ2Jbk6PC7chWh. There were 72 attendees at the Live Q&A Session on August 3. The webcast included access to a Qualtrics survey (http://uaa.co1.qualtrics.com/jfe/form/SV_4YFcUVbmYtD2pEO) created by Gwen Higgins (CORDA) to solicit feedback from SAA community members to inform future educational offerings.

Research and Innovation Wednesdays
CORDA partnered with the SAA Research Forum to offer a suite of *Research and Innovation* programs woven throughout the annual meeting. "Research and Innovation Wednesdays" was a three-part series that occurred in July leading up to the Annual Meeting that introduced members to the many ways in which SAA supports research and innovation in the profession.

1. Research & Innovation #1: Introduction to Research & Innovation @ SAA **Attendees:**

Our kick off program "Introduction to Research & Innovation @ SAA" was held on Wednesday, July 14, from 2:00-3:15 CST. The session included lightning style presentations by: Nancy Beaumont (Introduction/background), Jennifer Gunter King (CORDA overview), Nance McGovern (SAA Research Forum), Amy Cooper Cary (Editor, *American Archivist*), Beth Myers (A*CENSUS II), Erin Passehl Stoddart (SAA Dataverse), Derek Webb (SAA Institutional Archives), and Margery Sly (SAA Foundation Research Grants). A discussion with attendees was facilitated by Jennifer King and Nance McGovern. The program was recorded and is available at: https://www.pathlms.com/saa/events/2635/video_presentations/205690.

2. Research & Innovation #2: SAA Research Forum: Wednesday, July 21, from 1:00-4:45 pm CST. CORDA had the honor of co-hosting the forum, and gave an overview of Research and Innovation as part of the opening of the session: https://www2.archivists.org/am2021/research-forum-2021.

3. Research & Innovation #3: SAA Research Forum: Wednesday, July 28, from 1:00-4:45 pm CST. CORDA had the honor of co-hosting the forum, and gave an overview of Research and Innovation as part of the opening of the session: https://www2.archivists.org/am2021/research-forum-2021.

Conversation Lounges

SAA offered a new type of session at the 2021 Annual Meeting, Conversation Lounges, which were meant to provide opportunities for informal connection and discussion with the presenters. The three Conversation Lounges stemmed from topics at the Research and Innovation Wednesdays in July, including two that CORDA hosted.

1. Conversation Lounge #1: Introduction to Research & Innovation @ SAA, Wednesday, August 4, 3:00-4:00 CST. **Attendees: 52**

This session featured speakers from the Research & Innovation #1 session. It was facilitated by Jennifer King and included Nance McGovern (SAA Research Forum), Amy Cooper Cary (Editor, *American Archivist*), Beth Myers (A*CENSUS II), Derek Webb (SAA Institutional Archives), and Margery Sly (SAA Foundation Research Grants) and provided an opportunity for attendees to explore opportunities within SAA for engaging in research and to brainstorm research ideas.

2. Conversation Lounge #2: A*CENSUS II, Thursday, August 5, 3:00-4:00 CST. **Attendees: 43**

This session was facilitated by Beth Myers (Smith College) and Makala Skinner (Ithaka S+R). It reviewed progress made on A*CENSUS II and next steps towards launching the two surveys.

3. Conversation Lounge #3: SAA Dataverse, Friday, August 6, 3:00-4:00 CST. **Attendees: 24.**

CORDA members and facilitators: Erin Passehl-Stoddart (University of Oregon), Emily Lapworth (University of Nevada, Las Vegas). This session reviewed progress made on the SAA Dataverse this past year, including an overview of new policies and procedures.

Who is CORDA?

The Committee is composed of exceptionally committed and hard-working members who all bring complementary expertise and a collaborative work style. All of the above work is possible thanks to this stupendous group of SAA volunteers.

2020-2021 Committee
Co-chair: Jennifer Gunter King (Emory University)
Co-chair: Erin Passehl-Stoddart (University of Oregon)

Sarah Buchanan (University of Missouri Columbia)
Gwendolyn Higgins (University of Alaska Anchorage), new member
Cristina Horak (Federal Reserve, Dallas)
Emily Lapworth (University of Nevada, Las Vegas), new member
Chris Marino (Stanford University)
Dennis Meissner (retired)
Sarah Pratt Martin (Simmons SLIS)
Mary Biddle (Smith College), early-career archivist member

SAA Council Liaison: Ricky Punzalan (University of Michigan)
SAA Education Liaison: Carli Lowe (San Jose State University)
Ex Officio: Paul Conway (University of Michigan)
Ex Officio: Nance McGovern (SAA Research Forum)
Ex Officio: Nancy Beaumont (SAA)

Looking Ahead to 2021-2022: New Committee Roster
Co-chair: Jennifer Gunter King (Emory University)
Co-chair: Erin Passehl-Stoddart (Michigan State University)

Sarah Buchanan (University of Missouri Columbia) - reappointed
Jane Fiegel (Xavier University of Louisiana) - new early-career member
Gwendolyn Higgins (University of Alaska Anchorage)
Maggie Hughes (The Huntington Library, Art Collections, and Botanical Gardens) - new member
Emily Lapworth (University of Nevada, Las Vegas)
Chris Marino (Stanford University)
Dennis Meissner (retired) - reappointed
Sarah Pratt (Simmons SLIS) - reappointed

SAA Council Liaison: Jasmine Jones (University of California, Los Angeles)
SAA Education Liaison: Jen Wachtel (University of Maryland)
Ex Officio: Nance McGovern (SAA Research Forum)
Ex Officio: Jackie Price Osafo (Executive Director, SAA)

Goals for 2021-2022
1. Populate SAA Dataverse, iterate around policies and workflows, promote and encourage engagement. Address sustainable administrative practices around maintenance of the repository and reviewing submissions
2. Publish Facts and Figures Website, and continue to develop its resources
3. Establish Research Roadmap

- Bring Research Roadmap forward -- developing in partnership with membership, and tying to SAA strategic plan and goals by working through SAA Council. Adopt the roadmap, publicize priorities, and identify key initiatives. Present roadmap as framing for SAA supported research initiatives, possibly including SAA Foundation grants, American Archivist submissions, and grant-funded research initiatives

4. Education and Outreach - in partnership with SAA Education Committee continue developing educational workshops and events
   - Research basics
   - Self-paced online courses through SAA Education, topics may include:
     - Hypothesis development
     - Research instruments and design
     - Survey deployment
   - "Demystifying Data Analysis" - Take 2, Summer 2022
   - Consider training sessions on contributing materials to the SAA Dataverse
5. White Paper - CORDA intends to develop the white paper presented at the 2019 SAA Research Forum as an article detailing the history of research, data and assessment in the archival profession. Lead author Paul Conway and Jennifer King, inaugural chairs, are determined to see this through as it will offer a critical overview of a broad history underpinning current efforts. We also plan to circle back to the Council of State Archivists to update on the Collection Development Policy, and give CoSA an opportunity to determine whether to submit their annual reports.

We look forward to all questions, and the work ahead!

Link to last year's report: https://www2.archivists.org/sites/all/files/1120-V-G-CORDA.pdf