

Personas Developed by the TF-CORDE, 2017-2018

April 2018

Table of Contents

Overview of Personas, TF-CORDE Members	1
SAA Staff	3
SAA Leader	6
Federal Government Archivist	9
Local Government Archivist	11
Tenure-Track Archivist	13
Lone Arranger	16
Business Archivist	18
New Professional	20
Executive Director of a Small Repository	22

Overview of Personas

The SAA Task Force on Research/Data and Evaluation (TF-CORDE) developed personas in order to articulate and establish need(s) for research activities that an SAA standing committee of the same would undertake. We present those personas here as they may be useful to our audiences. Only identifying details have been redacted.

In order to discover archivists' needs regarding research and data, we adopted the *user persona* method developed by the user-centered design community for the design of systems such as websites and information architecture. Our methodology comprised first selecting *categorical personas* and interviewing 1-3 individuals representative of that category. We interviewed individuals representing some diversity of perspective within each category (e.g. geography, background). We then aimed to demonstrate through rich detail and scenarios how each persona would interact with the topic of archival research and data.

In September, we as a group identified the below nine (9) personas as those most applicable and representative of the archival profession, as well as an interview script and template. We completed interviews by January and each of us took the lead in compiling respective interviews into a composite persona for each category. We reviewed key aspects from each persona in our spring meetings, noting similar and novel issues raised in each persona. Please see Michelle Light's April 2018 Report to Council for our key findings from completing the user persona activity: <https://www2.archivists.org/sites/all/files/0518-VI-H-TF-CORDE.pdf>.

Members of the SAA Task Force on Research/Data and Evaluation (TF-CORDE), 2017-2018:

Michelle Light (Chair)
Sarah Buchanan
Mahnaz Ghaznavi
Dennis Meissner
Dan Noonan
Stacie Williams
Kris Kiesling (Council Liaison)

SAA Staff

Persona group	SAA Staff
Fictional Name	Archival Supporter1
Job title and responsibilities	Each of 12 FTE on staff at SAA headquarters works on a daily basis to support member needs in specific areas, managing activities (publishing, governance, and technology) based on interactions with members and with member data. The SAA Archivist adheres to SAA Policy in creating access to historical and current items in SAA's archival collection , using ArchiveIt to crawl SAA's website and component group microsities at <i>archivists.org</i> . SAA's journal editor interacts with data in the course of reviewing author contributions and also provides perspective on research trends in the archival profession, including predecessor CORDE efforts and A*CENSUS (data online).
Demographics	SAA Staff bring the association management perspective to the discussion of research and data about archives. Colleagues such as the SAA Archivist and <i>American Archivist</i> editor bring professional archival experiences and day-to-day insight regarding archivists' needs and initiatives, and usually have an MLIS degree from an archival graduate program. SAA represents 6200+ members, primarily in the U.S.
Goals and tasks relating to conducting research and/or using data	<ul style="list-style-type: none"> • SAA Staff seek to support the archival profession and member development, provide leadership and promote public awareness. Help 'Archivist' become a household word. • The SAA Archivist's goals include digitizing SAA component groups' annual reports to facilitate more research about trends in program activities (e.g. Section histories) and for biographical research. Overall, a desire to see and support more quantitative (e.g. salary, statistics) and qualitative (biographical, issue-focused) archival research. • In serving on SAA's Institutional Evaluation Task Force, SAA's journal editor (prior to assuming that role) pursued a goal of conducting regular, regionally-grouped but comprehensive surveys of archival institutions (their budgets, staff, collections, extent, users). One was conducted in 1985, described by Paul Conway at https://doi.org/10.17723/aarc.50.2.l211240g46238078 . The Task Force's focus (and a third on program accreditation) was gradually dropped in favor of focusing on individual archivists.

	<p>As journal editor, did not experience authors requesting data deposit, but did conduct the reviewing process electronically. N.B. online availability of the A*CENSUS “raw data”: https://www2.archivists.org/initiatives/acensus-archival-census-education-needs-survey-in-the-united-states .</p>
<p>Issues of concern</p>	<ul style="list-style-type: none"> • Strongly encourages efforts to: (1) inventory and provide links to completed, full datasets generated by SAA groups (many in recent years) and externally (e.g. NHPRC 1988 <i>Directory</i>), (2) define ‘data’ for our purposes, (3) acknowledge (a) data from SAA’s AMS that is used internally and (b) allied organizations’ datasets and the role for SAA, (4) build upon A*CENSUS focus on articulating the universe of archivists (the entire profession) by generating granular data on archivists’ backgrounds/location /industry, and (5) attend not only to archivists’ perspectives but also repository-level data (SAA groups seem to cover particular activities well). Media stories impact recruitment & retention in the field, and without numbers to give reporters about the profession, the story remains very local and individual. • The SAA journal editor likewise emphasized the research need around repository-level data, and suggested we continue institutional evaluation efforts (see Conway 1987 article) to facilitate cross-institutional comparisons, perhaps by pooling Aeon registration data. • Would like to see SAA: (1) establish a Press webpage to direct reporters to include basic information about the size and makeup of our profession, (2) assist prospective students by providing basic data with which to evaluate particular graduate programs, (3) offer data on its own continuing education programs, methods, and outcomes. • Continually encourages archivists to donate inactive records and data to the SAA Archives.
<p>Physical, social, and technological environment</p>	<p>The SAA headquarters in Chicago, as well as the SAA Archives at the University of Wisconsin-Milwaukee, offer a welcoming, networked work environment to carry out SAA activities, which include maintaining the SAA website at archivists.org and a supporting AMS to provide member services. The SAA Archives web archives are continually updated on ArchiveIt at: https://archive-it.org/collections/4389 . SAA’s journal editor conducts an all-electronic reviewing process.</p>

<p>Quote that sums up most what matters to the persona</p>	<p>“Our primary need is for a central place where we can direct people to various information. Over the years members have generated many datasets which currently don’t have a home (just search “survey” on SAA’s website) – let’s make that available AND have a process to update those studies. <u>It would help us answer reference queries with greater depth and ease, and improve our marketing efforts.</u> Important datasets to build on include a major 2012 membership survey, David Carmichael’s 2009 economic impact study of archives, NHPRC’s 1988 <i>Directory of Archives and Manuscript Repositories in the United States (Second Edition)</i>, stories from President Kathleen Roe’s initiative and the ArchivesAWARE! blog, and everything found by searching “survey” on SAA’s website.”</p> <p>“We can best advocate for ourselves by matching stories with data.”</p> <p>“I would like to see and use data about institutional evaluation processes, so we can compare and improve specific institutional practices. Repository-level data has only been collected and reported in a few places – the Conway 1987 article, A*CENSUS published in 2006, and the MPLP 2005 Greene & Meissner article – and while those are at the level of the entire profession and very valuable, we also need data at the practitioner level and user studies.”</p>
--	--

SAA Leader

Persona group	SAA Leader
Fictional Name	Margot Fonds
Job title and responsibilities	<p>SAA President</p> <p>As SAA president, Ms. Fonds advocates for archivists and the archival enterprise. She communicates with membership, she writes letters to external entities describing SAA's position on issues of concern, she helps draft and review issue briefs, she talks to various potential resource allocators, and she lobbies for archives and archivists in various settings.</p>
Demographics	<p>Ms. Fonds has about 25 years of experience as a professional archivist in government and academic settings. She has a master's degree in history and archival management. In addition to serving as SAA President, she has also served on SAA Council, the Committee on Public Policy, and other leadership positions within the organization.</p>
Goals and tasks relating to conducting research and/or using data	<p>Advocate for archivists' salaries</p> <p>Ms. Fonds often hears concerns from SAA members that archivists are not paid fairly and that SAA should do more to raise archivists' salaries. She agrees, but finds that she doesn't have baseline information to advocate effectively for this. She would like to have data about salaries for archivists in different regions, in different kinds of institutions, with different kinds of degrees, so she can make some comparisons within the profession and in relation to other disciplines. She appreciates the recent Section survey (link) relating to this, and would like to see this done more regularly and for the data to be collected and made available in such a way that they could be used by more people for different purposes.</p> <p>Describe archives and the archival profession</p> <p>Ms. Fonds has trouble answering basic questions like:</p> <ul style="list-style-type: none"> - how many archives are there in the U.S., - how many archivists are there, - how much archival material is preserved in the U.S., - how many people use archives on an annual basis, or - how many books, articles, or videos have been published per year after using archival sources. <p>She doesn't know this because it is not collected or</p>

aggregated anywhere. She uses what little information does exist from various sources, like CoSA about state archives, ARL for information about archives in research libraries, ancestry.com for genealogical users, and other sources, then makes wild guesses. She wishes she had access to data like librarians have from ALA or museum professionals have from AAM.

Articulate the value of archives to external groups

She believes that archivists need to demonstrate that we are essential to a democratic nation, that access to archives is a bedrock of democracy. She collects anecdotal stories about how archives are used to help her make this argument.

Although she uses these anecdotes in her own advocacy work, she doesn't collect them in such a way that they could be shared or used by others.

She would also like to describe the economic impact of archives within a community or the importance of archives to advancement of knowledge. She uses local or anecdotal information for this, because she doesn't have access to data about this across the profession.

Argue for increased funding for archives

She would like to have more information about how much it costs to run all aspects of archival repository to help her communicate need more effectively with resource allocators.

Represent member concerns

To understand what is of concern to members, Ms. Fonds relies on Twitter, scanning the SAA listservs, personal conversations, and archivists' blog posts. She gathers impressions about issues of shared concern or passionate concern in order to represent these issues in SAA Council for action. She also uses them in crafting her own blog posts and communications to members.

Ms. Fonds would like to understand better the transition in the field as we add more and more digital archivists. She would like more studies of this so SAA can plan to retain and support the diversity of membership in the future.

On rare occasions, Ms. Fonds looks back to A*Census or past surveys to gather a better sense of who archivists are and what they are concerned with, but these are too out of date at this point to be of much value.

	<p>Ms. Fonds also relies on SAA membership data e.g., institution type and salary range, to tell her more about the nature of SAA members.</p>
<p>Issues of concern</p>	<p>Ms. Fonds is concerned that by and large, archivists don't know how to use data effectively to advocate for themselves or their programs. She believes archivists need more education about how to represent the benefits of archives to resource allocators. Archivists need to measure their impact and show their business value. They need to speak the language of resource allocators and show the return on investment. This will help archivists get more funding to support their programs as well as higher salaries.</p> <p>Ms. Fonds knows that SAA staff are spread thin, and data collection/management can't be added to existing workload. She wonders what kind of external support is available, for example, if a university might wish to build and sustain a data collecting program for archivists. She also wonders if SAA might find the funds to outsource regular data collection, like LibQual or the Ithaka survey model.</p>
<p>Physical, social, and technological environment</p>	<p>Ms. Fonds has access to software and technological support through her university. However, for SAA work that is shared externally (blogs, listservs, website, survey instruments), she relies on SAA technology and staff.</p>
<p>Quote that sums up most what matters to the persona</p>	<p>"My effectiveness as SAA President was hampered because I lacked solid data. Instead of using data, I told anecdotal stories to convince people about the value of archives. If anyone challenged me to show data or evidence, I would have been torn to shreds."</p>

Federal Government Archivist

Persona group	Federal Government - Sciences
Fictional Name	Feddy Riaghaltais Tasglann
Job title and responsibilities	<p>Archivist</p> <p>Reporting to the Head of a Science Center within a Federal Agency, the Archivist is responsible for appraisal of research data and reports, and the subsequent accessioning, preservation and providing access thereof.</p>
Demographics	<p>Feddy, an archivist for more than two decades with the federal government, has a BS in a field related to their agency and a Masters of History. Further, they have earned a Modern Archives Institute certificate, Knowledge Area Certification from NARA, and has participated in a digital preservation research fellowship. Feddy is an active member of several archives, records and discipline specific professional organizations.</p>
Goals and tasks	<p>Feddy conducts basic research in records appraisal and media longevity. These two activities are intrinsically linked to determining how to best manage and preserve big-data created by our scientific federal agencies. They have been developing decisional documentation for more than a decade regarding appraisal, accessioning and de-accessioning of science records and data sets. Further, Feddy needs to stay abreast of storage media refresh rates, and conduct bi-annual studies of existing inventories of storage media per NARA standards.</p> <p>As a “legislated archive” Feddy maintains monthly reporting data back to the 1980s, which must be maintained forever. The data and statistics that they use are self-generated, and may be used for legislative advocacy.</p>
Issues of concern	<p>While all data is currently stored “on prem” either on a local network or external storage media, Feddy foresees a future where there is likely a need to utilize commercial, off-prem cloud storage. They see this one area of where benchmarking data may be handy to have in regards to services provided and metrics for estimating costs along the lines of a POWRR Tools Grid (link).</p> <p>Feddy indicated that they do make reports publicly available via the Internet and World Wide Web; as such they have a desire to learn how to acquire and analyze web usage statistics at a more granular</p>

	<p>level, in order to better understand their user base. Further, they would like see a deeper data pool on community usage and tools for gauging it.</p> <p>As appraisal a key concern, Feddy would like to see a repository of appraisal research and tools, especially for born digital and big-data records.</p> <p>Lastly, Feddy would like to see SAA create a portal for achieving and maintaining Trusted Digital Repository (TDR) status. This may include, standards, case studies, templates and tools.</p>
<p>Physical, social, and technological environment</p>	<p>Feddy indicated that their agency has a robust Information Technology group that support the work that their unit conducts, along with the long-term management required by the archival aspects of the reports and data. In addition to on-prem storage that includes immediate user access via solid state drives and storage on spinning disks and tapes, they have more that 5PBs stored on LTO off-site.</p> <p>Key to accomplishing the archival tasks entrusted to Feddy, is having open channels for communication internally, which is accomplished by active participation on internal and NARA committees, as well as active participation in archives, records management and scientific domain specific professional associations.</p> <p>Unfortunately, much of the professional interaction has to be accomplished via “virtual” means as professional travel is significantly restricted for federal government employees. As such, Feddy sees an even greater need for SAA and other professional associations to make tools and resources available via the Web.</p>
<p>Quote that sums up most what matters to the persona</p>	<p>“We are “big-data” and are sending TBs/day to off-site storage. Therefore our needs are three-fold:</p> <ol style="list-style-type: none"> 1. How do we effectively appraise, accession and de-accession when necessary? 2. How do we get a better understanding of our users’ research needs to better serve them, and make the aforementioned decisions? 3. How do we effectively preserve and provide access to this monolith of data that is only getting larger?”

Local Government Archivist

Persona group	Local Government
Fictional Name	Llokal Llywodraeth Archie-Fydd
Job title and responsibilities	<p>Archivist & Records Manager</p> <p>Reporting to the municipal clerk, is responsible for implementing records management program in accordance with state regulations for public records. Further, is responsible for accessioning, preserving, and providing access to municipal records of historical significance.</p>
Demographics	Llokal has a BA in History along with an MLIS, has earned their ACA certification, and is currently working towards their CRM. They have prior experience working for a state historical society and teaching as an adjunct.
Goals and tasks	<p>Llokal uses a wide variety of resources for researching topics that impact their day-to-day work. These may include reviewing peer websites, white papers, blogs, electronic mail lists, and consortial/collaborative projects.</p> <p>A key aspect of their research activity is identifying benchmark data from other institutions and within the professions (archival and records management).</p> <p>In addition, their archival/records management program is responsible for generating and maintaining productivity data for the municipal administration. While there are dozen that are requested, their unit also need to account for number of:</p> <ul style="list-style-type: none"> ● records accessioned, ● records digitized, ● reference requests fulfilled, ● record disposal (and quantity) approved.
Issues of concern	<p>One of Llokal's main concerns is that the type of productivity data they generate is not shared beyond the municipal administration, nor do other municipalities within their state or even nation share that data with Llokal. One of the factors for this is that there is no channel or platform for doing so.</p> <p>Llokal indicated it would be beneficial to have access to low cost or shareware tools and/or templates for data collection and digital disk inventory among other items. To this end they would like SAA to</p>

	<p>provide a peer-reviewed digital curation/preservation shareware resource similar to the POWRR Tool Grid (link) for “bleeding edge” tools.</p> <p>Finally, Llokal would like to see more semi-related initiatives:</p> <ul style="list-style-type: none"> ● More case studies published along the lines of the Campus Case Studies (link), but that are either more generic or representative of more diverse environments. ● Aggregation of what others in the profession are doing that works, but in digestible bites.
<p>Physical, social, and technological environment</p>	<p>Llokal has access to a wonderful and robust Information Technology Department that provides technical advice and assistance. The drawback is that it is a municipal-wide IT unit that is not embedded within the Archives, nor in the Municipal Clerk’s operations. As such machine administration is locked down so that it is difficult to download and install shareware tools for digital forensics and preservation experimentation. Further, there are so many other municipal technology priorities, it is difficult to get a digital preservation environment stood up.</p> <p>From an external communications point-of-view, Llokal engages with local state and national organizations in the archives, records management and museum communities. They volunteer for leadership positions within these organizations, attend professional development events, follow electronic mail lists via digest mode, but does not really read professional publications.</p>
<p>Quote that sums up most what matters to the persona</p>	<p>“I would like to have a better idea of the scope of our electronic records holdings, and what types of research methods and tools to accomplish that.”</p>

Tenure-Track Archivist

Persona group	Tenure Track
Fictional Name	Myra Cubic
Job title and responsibilities	<p>Archivist</p> <p>Reporting to the Head of Special Collections, Myra is responsible for performing reference, teaching, and processing collections. Occasionally she assists with digitization efforts. As a tenure track faculty member, she is expected to spend 20-40% of her job on scholarly research and professional service.</p>
Demographics	<p>She has a master's degree in library science with a specialization in archives. She has worked as a tenure-track professional in an academic research library for 3 years.</p>
Goals and tasks relating to research / data collection.	<p>For her job:</p> <ul style="list-style-type: none"> ● She collects reference and use statistics. She also collects instruction statistics. She thinks some of this is reported to ACRL or another library organization. She collects these statistics: <ul style="list-style-type: none"> ○ To demonstrate her performance to her superiors ○ To document the work done annually by her department ○ To make the case that more staff is needed to support demand ○ To make a case in grant proposals ○ To better understand what researchers are interested in ○ To support future processing, digitization, or instructional work, and ○ To understand the impact of instruction. ● She collects statistics on processing efforts. She collects them: <ul style="list-style-type: none"> ○ To demonstrate her performance to her superiors ○ To document the work done annually by her department ○ To make a case in grant proposals, and ○ To benchmark performance, encourage efficiencies, find inefficiencies, and find ways to improve. <p>For the research/scholarship component of her work:</p> <ul style="list-style-type: none"> ● She often searches for articles and blog posts about work at other archival institutions.

	<ul style="list-style-type: none"> ● She has a range of research interests, including: <ul style="list-style-type: none"> ○ Studying what users want out of archival materials online ○ Studying collection management practices across the profession
<p>Issues of concern</p>	<ul style="list-style-type: none"> ● She collects data based on what is required for reporting as well as based on what she thinks is interesting to collect. She would like to have access to standard survey tools or standard measurement tools to make data collection easier and to make benchmarking/comparisons more possible. <ul style="list-style-type: none"> ○ For example, she wanted to do a collection survey to bring to the surface more documentation about underrepresented groups, but she couldn't find an appropriate survey instrument available for her to implement. She had to create her own based on what she wanted to accomplish and based on what others have written about. She wished people had provided the actual survey instrument they used so she could use it too. ● She wishes she had access to more data about other repositories so she can better understand her own institution. For example: <ul style="list-style-type: none"> ○ She would like to know more about user behaviors and user statistics across repositories, what users are interested in, what they like, what kinds of reference requests, volume of requests, etc. ○ She would also like to know more about processing rates from other institutions. She wishes that grant agencies would publish this information for past processing grants. ○ When she reads case studies in the literature, she often wishes that people would make their raw data or raw analytical tools available too. ● To support her research about specific topics or issues, she would like to have access to generalized data about repositories as well. Ideally, data would: <ul style="list-style-type: none"> ○ Provide basic information about repositories across the U.S. ○ Be captured longitudinally / annually, and ○ Be open and easy to reuse and manipulate. ● A lot of the data that she sees or collects about her institution isn't shared broadly with the profession. She thinks it would be helpful to share more. ● She would also like to know more about staffing in the profession to help her make arguments more effectively about

	<p>staffing issues in her own repository. How well staffed are institutions, how much do staff accomplish, what is their training, background, etc.</p> <ul style="list-style-type: none"> ● She wished there was something like this for archives: http://museumstat.org/#/ ● She would like more training on creating surveys, collecting data, mining and analyzing data.
<p>Physical, social, and technological environment</p>	<p>Myra works in a Special Collections unit in an academic library. There are 10 other staff in Special Collections. IT support is stretched but adequate for her needs in terms of desktop support. But, she doesn't have dedicated IT expertise to work with or consult on advanced research projects.</p> <p>She collects statistics for her work in Google spreadsheets. Also uses Google Analytics for studying web traffic and LibStats for gathering patron statistics.</p> <p>She uses Internet forums and Code4Lib for additional technological support.</p> <p>She follows blogs and Twitter to get information about advances in the profession.</p>
<p>Quote that sums up most what matters to the persona</p>	<p>"I wish we had some standard measurement tools I could use to help us better understand our work or better understand our users. If I used a standard survey or data collection tool, then I could compare our data with other repositories."</p> <p>"I would like to see a collecting registry: we have no sense of the vastness of the profession, where archivists are, and what do they collect."</p>

Lone Arranger

Persona group	Lone Arranger
Fictional Name	Sarah Manyhats
Job title and responsibilities	<p>State University Archivist and Records Manager</p> <p>Sole archivist in a small unit of Library Special Collections responsible for university records and a small number of manuscript collections. Ms. Manyhats is responsible for acquiring and administering university records with archival value and manuscript collections valuable for faculty and student research. She may occasionally have some student or temporary staff support, but is largely responsible for all phases of archives administration, including outreach and advocacy, and for keeping a nascent university records program functioning.</p>
Demographics	<p>Ms. Manyhats has an MA in Library Science and 10 years of archives and collections experience in 3 institutions, 2 of them academic library settings. She is becoming more active in a regional association and in SAA, especially in the Lone Arrangers Section, which she considers a real lifeline. She would like to become more involved, but is hampered by limited travel funds and a notable lack of time.</p>
Goals and tasks relating to conducting research and/or using data	<p>She is first and foremost responsible for pulling and reporting patronage statistics, which she reports to the head of special collections. As time permits she tries to gather and curate other data that can support her advocacy efforts for the archival collections program (and for the security of her position). That advocacy is almost entirely internal.</p>
Issues of concern	<p>Ms. Manyhats has several concerns relating to using and acquiring research data:</p> <ul style="list-style-type: none"> ● How do I survey users and other stakeholders in ways that are meaningful and scientifically valid? ● How can I find comparable data from my peer repositories that are trustworthy and relevant? ● Where are the <i>archival</i> models for capturing impactful data? All the models I see are from libraries. ● Where are some tools that I can use to capture, manipulate, and report data, so as to make a stronger advocacy case? ● How do I conduct a research project on my own? ● How can I do these things on a very limited budget and with little free time—are there community tools and resources to

	help me get started?
Physical, social, and technological environment	<p>My contacts with archival peers are dominated by online social platforms and occasional conferences. I don't always feel confident that I am performing as well as my colleagues in other archives, or that I even know what good performance means.</p> <p>Technologically, my experiences are mixed. I have strong skills, but I don't always have adequate support from my institution, whose support priorities are with programs other than mine. I may get adequate server and help-desk resources, but I need to administer and support archives-specific applications and appliances on my own.</p>
Quote that sums up most what matters to the persona	<p>"I would like to make more use of research and research data, but I am not sure how to find data that already exists and how to perform meaningful research on my own."</p>

Business Archivist

Persona group	Business Archivists
Fictional Name	Annie Cho Hoskinson
Job title and responsibilities	<p>Archivist</p> <ul style="list-style-type: none"> ▪ Accessions and processes collections and creates collection records for these in a Content Management System ▪ Conducts research primarily for product licensing, and secondarily for exhibits ▪ Oversees the work of a project archivist
Demographics	<p>Staffing and Education</p> <ul style="list-style-type: none"> ▪ She began her career at a state historical society; after two years, she moved into the private sector, where she has been for the past ten years. ▪ There are a total of 5 FTEs in her department. <ul style="list-style-type: none"> ▪ Two, including her, hold Masters in Public History. ▪ The other three hold MLIS degrees. ▪ There is one Director, and four Archivists who report to the Director. <p>Reporting</p> <ul style="list-style-type: none"> ▪ The unit reports in the Marketing and Communications Division. ▪ The organization is made up of one hundred fifty thousand employees worldwide and operates in over thirty countries.
Goals and tasks	<p>Goal: research the collection in the service of telling the organization's history</p> <ul style="list-style-type: none"> ▪ Actively doing research in service of Marketing's effort to compile and present company history. ▪ She and her colleagues in the department are encouraged to focus on the stories before the records - for example, the resource allocators at her company were interested in the story behind how the corporation defended their copyright decades ago. <p>Goal: research the collection in order to identify gaps to fill</p> <ul style="list-style-type: none"> ▪ Seeks to complete or complement the collection by searching eBay and other auction houses looking for company memorabilia. <p>Goal: learn how users are using collections</p> <ul style="list-style-type: none"> ▪ Find metrics on how involved other archivists are in social media, how engaged they are – what's worked, etc.
Physical,	She does not feel the pressure her colleagues in college and

<p>social, and technological environment</p>	<p>universities or other academic institutions seem to with regard to being published in peer reviewed sources</p> <p>She has found that users are interested in answers to the question rather than how to research</p> <p>They have found that metrics are not helpful to their organization nor does management value numbers related to use of collections/visitors</p> <p>She has to work with a strong firewall and an outsourced IT group. Her team does not use the open source solutions available to archivist colleagues in college and university settings.</p> <p>She does not read the listserv; instead relies on private messaging or otherwise contacting a small informal network. Because there are proprietary considerations when working for a corporation, the questions she sometimes has may not be posed on an open listserv.</p> <p>Wishes there was more information on salaries and hopes that SAA carries out an A*Census again.</p> <p>Wishes there were more tools to help interpret statistics, as this is a weak area of understanding for her.</p>
<p>Quote that sums up most what matters to the persona</p>	<p>“We want to be known as a “living archive” so our resource allocators do not look to us for (or care about) the amount of material we processed this past year. I wish there was a way to measure reach or influence or goodwill – you know, the intangibles.”</p> <p>“I am excited that SAA is including us in this conversation – our concerns are a little different from those in the profession who work in other settings.”</p>

New Professional

Persona group	New Professional
Fictional Name	Clark Corpus
Job title and responsibilities	<p>Outreach Archivist / Rare Book Curator</p> <p>Clark is responsible for performing reference, instruction, processing collections, and more recently, curating a significant rare book collection. They are also interested in potentially pursuing a doctorate in archival studies because they are interested in doing their own research.</p>
Demographics	They have a bachelor's degree in English and a master's in archival studies. They are also a Certified Archivist.
Goals and tasks relating to research / data collection.	<p>For their job:</p> <ul style="list-style-type: none"> ● They track metrics on reference, particularly as they relate to the reading room (number of patrons per day, whether by call, by email, or in person, type of request). These metrics serve a dual purpose. One set of metrics is used internally, the other set pulls quantitative and qualitative data for an annual report given to the university. ● They also track metrics related to impact. Their school has a big focus on undergraduate retention. These metrics can vary in terms of criteria that evince impact, but university administration wants to see retention and community engagement with departments and with students and faculty. Included in impact reporting are “thank yous” and testimonials from faculty or students. <p>For the research/scholarship component of their work:</p> <ul style="list-style-type: none"> ● They collected internal data culled from reference metrics on how underrepresented groups on campus were using special collections. ● They are especially interested in how their repository, whose archives are very recently established, compares with repositories of similar size and staffing levels, number of rare books or size of undergraduate population.
Issues of concern	<ul style="list-style-type: none"> ● Because of the potential doctoral interest, they are interested in conducting their own research, but there is a lack of research protocol information available in archives. While they worked with their university on IRB procedures and did some lit reviews, some mentors or protocols available within SAA

	<p>would have been helpful or samples of research methodology on SAA's website related to archives research.</p> <ul style="list-style-type: none"> • Clark would like to have more stats and data about the types of collections that serve, especially where rare books are concerned. Special Collections acquires books around themes, but they would love more information on what students want them to have in their rare books collection.
<p>Physical, social, and technological environment</p>	<p>Clark reports a high level of collaboration with university IT, which for instance helped Special Collections manage its ArchivesSpace implementation and paid for it. They work in a Special Collections department of the academic library with five FTE and a small number of interns or graduate students to assist with processing and digitization.</p> <p>They are a member of several SAA sections and chair one in their interest area of reference and outreach. They also have a social media presence on multiple platforms and use that as a way to network with more archivists in the field.</p>
<p>Quote that sums up most what matters to the persona</p>	<p>"I just want to keep up with what's happening because we're all specialized in a different way and there's so much to learn."</p>

Executive Director of a Small Repository

Persona group	Executive Director
Fictional Name	Loretta Mods
Job title and responsibilities	<p>Executive Director</p> <p>Manages a small team of three FTEs at an archives-adjacent organization nested within a larger academic library. Much of her job involves researching and surveying local communities and cultural heritage institutions in a large urban area about collections related to a specific ethnic group in the city.</p>
Demographics	<p>She has a bachelor's degree in history and master's degree in library science with a specialization in archives. She has worked as an executive director for two years.</p>
Goals and tasks relating to research / data collection.	<p>For her job:</p> <ul style="list-style-type: none"> ● She researches holdings at different institutions related to the subject areas. She collects statistics on which member organizations use the collections in that subject area or have created scholarly work from them. She also researches grant-funding agencies to see what kind of work they are funding for related collections or member institutions. These statistics are taken: <ul style="list-style-type: none"> ○ For advocacy purposes, communicating the value of these specific collections to the community. ○ To document outcomes of collection availability or discovery ○ To make a case in grant proposals ○ To understand what researchers need ○ To document how well her organization's efforts are serving their member institutions ○ Annual reports to academic library and/or donors <p>For the research/scholarship component of her work:</p> <ul style="list-style-type: none"> ● She searches Google Scholar and social media platforms to see what collections from member institutions that researchers may have cited in their own work.
Issues of concern	<ul style="list-style-type: none"> ● Loretta would like to have access to annual stats from member institutions on collection use. This could be from reference, instruction, scholarly output, or outreach like exhibits or other programming, largely because she would like to see how use compares across different organizations, and

	<p>perhaps search for similarities or differences in the ways that the collections are being used.</p> <ul style="list-style-type: none"> ● She would like data on how many of the collections in her subject area are processed at member institutions quarterly or annually, including staffing data that gives the data context. This might help advocacy or external funding efforts. ● She would like more training on creating surveys, collecting data, mining and analyzing data.
<p>Physical, social, and technological environment</p>	<p>Loretta works as part of a larger academic library, which shares IT support with her organization. That support includes access to servers and local storage, basic and necessary hardware and software and upgrades, and access to IT staff where needed. Since her org is archives-adjacent, she is not storing collections within her office, but she also has access to whatever security protocols or disaster management plans are in place at the larger organization.</p> <p>She learns about trends and other information related to the profession through workshops, online webinars, and attending local and national conferences and forums. She also calls on complementary professional networks of small group cohorts (i.e. Rare Book School, Archives Leadership Institute, etc.) She is also active on social media and connects with other archivists and local researchers/users/advocates in her city through those platforms.</p>
<p>Quote that sums up most what matters to the persona</p>	<p>“I wish there was a survey of collections that are not necessarily in any formal archives repositories, or a listing or criteria of independent archives in order to build better relationships and amplify those collections related to the subject area.”</p>