Research Visits at Federal Collecting Institutions
Digital Stewardship Curriculum

- These slides provide an introduction to planning for research trips to federal institutions, and are most helpful to those at the beginning stages of their research, who may not have traveled to federal repositories in the past.

- Funding for travel, staff time, meals and lodging, transportation, etc.
  - Is there internal funding available.
  - Are there existing grant funds available for this purpose, or can you write a grant proposal that might cover expenses as part of a project?
  - Other funding opportunities.
    - Fellowships, internships
      - For example, the Native American Awards Community Scholar program at the Smithsonian Institution.
- Consider who should be part of a research and knowledge gathering trip.
  - Staff in your department? Community members? Elders?
  - There are also folks who might not make the trip themselves, but could aid you in planning for what to see and do.
    - For example, is there anyone who has made a trip to the institution in the past? What are their insights?
  - Also consider if you want to hire a professional researcher for any part of your project.
- Discuss goals
  - Work with your team to identify clear goals for making a trip to a federal collection institution.
  - Short term goals and long term goals for your community and department.
- Since you likely won't be able to meet ALL your goals with one trip, prioritize what should happen on the *first trip,* and what would come together at later stages.

Tools for Research Planning

- **Collaborative Curation Model**
  - Or other planning tool for collaboration
- **Online catalogs and websites**
- **Reference staff**
- **Get organized: Documenting your process**
  - Print outs
  - Document
  - Spreadsheet
- **Connect with colleagues doing similar work**

- You can find resources for creating a Collaborative Curation Model on the SHN - if you are interested in partnering with outside organizations and taking on collaborative projects in the context of research at federal institutions, this might be a good idea to incorporate in your planning and long term strategies
- Online catalogs and websites from the institution you want to visit can provide crucial information. It is good to get to know what is available online.
  - Many institutions will not have all materials digitized and online, there may only be a catalog listing of titles, partial information, or many unlisted collections which are not yet processed
- Reference staff are key to helping you find the tools to do your research, utilize reference staff as much as possible
- Get organized even as you start initial planning steps
  - You may be doing quite a lot of fact finding, logistics planning, and learning ALONG with your collections research
  - How do you feel most organized?
  - Do you prefer computer files? Do you like to have all your information printed out and placed in a binder or notebook? Are you a spreadsheet person?
  - This will help you stay on task for your project, but also make it easier to replicate your research project, build off of, or teach others what you have learned
- Do you know anyone else doing similar work in their Tribe, Nation, or community? Asking others about their experiences can be incredibly helpful as you are preparing.
  - This can be anything from very specific questions about collections or processes, or a more general conversation about their experiences.
  - Reach out to others in your field for help, this way, you can learn from their lessons learned - or work together if you are at the same stage.

Working with Staff at Institutions

- Personal introductions and connections
- Building relationships
- Communication
- Persistence
- Education, sharing

- A good first step, if possible, is to work with people and networks you already know to arrange a personal introduction
- What do you need to build a trusting and mutually beneficial relationship? Think about this question in relation to your approach to research and working with another institution.
- What are your preferred ways to communicate? What are the options you have available through the institution you want to visit?
- Sometimes you will need to reach out more than once, or connect with multiple people to get across your needs and goals. Be persistent and keep true to your goals and values.
- Staff at institutions will have varying levels of knowledge about your community, and varying levels of cultural competency with Indigenous nations and individuals
  - Research trips may be an opportunity to educate and share with individuals, departments, and institutions
  - Consider the additional time and labor involved in this possibility, and the personal boundaries and needs of people from your community doing research

Who to Contact?

- Consider: Who can best serve your needs?
  - Reference or research staff (first step)
  - Institutional leadership
  - Collections staff
  - Preservation staff
  - Other staff

- Depending on your project, working with certain people might be more beneficial to your goal
  - You might be working with many different types of staff, depending on your project goals and needs
  - Reference or research staff - do you need assistance understanding how to navigate their online platform, paper finding aids, or other reference help? Reference staff are there to help you with your research.
    - Reference staff are often the first step
  - Leadership - do you need to begin steps to make a formal agreement between your organizations? Is there a long term project and collaboration you want to start? Or are there policy changes that you would like to discuss with managers or other leaders?
  - Collections staff are those who work closely with the materials - Is there a staff member who has specialized knowledge about a collection and its history?
  - Preservation staff - do you need to ask questions about how a collection or item is stored or cared for, do you need to share important information about the cultural needs of an item?
  - Are there other staff in the organization that will be helpful? Who are they?
    - Information technologists, digital archivists, facilities staff, outreach staff….to just name a few other possibilities
    - Do you have any connections at the institution? For example, do you know someone in a related department who can help you get your foot in the door, or has knowledge that will help you connect with the right people?

Suggestions for Goals for a First Research Trip

- Tours and introductions to each institution/division you are interested in
- Research time
- Relationship building with repository staff

- If you have never visited a federal repository, these are suggestions for goals you might include for a first trip.
  - In the U.S. capital of Washington, DC, you may be trying to visit multiple institutions in one trip. If you are visiting one institution on a trip (for example a NARA branch that is closest to your location), your schedule and priorities will look different than if you are going to multiple places.
- Tours/introductions
  - Understand where each institution is located
  - Understand their organization - departments, hierarchies
  - Start to understand research processes
  - Try to prepare as much as possible before your visit - use the reference staff services and build relationships with them over the phone, video chat, or email as much as you can
- Plan for research time
  - Make a prioritized list of what you expect to accomplish
  - Plan for plenty of time, adding more time than you think you need
  - Think about who should be present when doing research
  - You may need to make many multi-stage trips, depending on your timeline and goals
  - You will get to know how research processes work through your hands on experience
    - Requesting materials
    - Making copies
    - Working with reference staff
- Build relationships -
  - Especially for long term projects

Research Preparation Suggestions

1. Make a list of goals for your research project and collaboration
2. Prioritize where to do research
3. Learn to use websites/catalogs
4. Reach out to staff, make connections and begin conversations and questions
5. Make a list of keywords/search terms
6. Research collections and items online or over the phone
   a. Keep track of your research/requests
   b. Note collection/Item identifiers
7. Make research appointments
8. Reprioritize

- Before a visit, there are some steps you can do to prepare
- Make a list of goals for research and collaboration
  - Even if you already discussed your broad goals, take time to make a list of your goals for this specific trip or project
- Prioritize where you will visit
- Learn to use the online tools available - these will be valuable skills throughout
  - Website with general information, staff list, hours, research procedures, etc.
  - Collections description information such as: a catalog of records, finding aids or collection descriptions, digital collections of digitized content
- As soon as makes sense, reach out to people at the institution and make connections
  - Get to know people over the phone, email, video…
  - Ask questions, get information, start to build a connection
  - Don't give up, be persistent, may have to try multiple ways or go through multiple people
- Create a list of subjects, people names, names used for your community, events, organizations, and other information that will help you find what you are looking for
  - Consider alternate spellings
  - Understand that collections and items may be categorized under colonial, racist, and ignorant terms
  - Staff may be able to help you create a list of terms, especially if you have some work done to start a list of terms
- Carry out research that you can do without being there in person
  - Narrow down the collections you want to see
  - Understand connections between collections
  - Develop more specific research questions and goals
  - Keep track of things in a way that works for you
  - Make note of collections identifiers, item numbers, and anything else that the institution uses to locate collections. Ask for help if you don't understand how they work it.
- Continue connections with staff - whenever possible
- If the institution requires you to make an appointment, or pre-register, make sure to do those steps
- After doing some of the suggestions here, you may find that you want to reprioritize your research goals and needs, after doing your online research and interactions with reference staff

Preparing for Well-being

- Collections, institutions, and content can be overwhelming
  - Physically, mentally, emotionally
- Connecting with staff
- Cultural needs, concerns, and safety

- In federal institutions, the amount and scale of information can be staggering. Overwhelmed feelings might come up around seeing and feeling:
  - Past and current colonial policies, practices and methods of collecting
  - The amount of belongings, items, collections, materials from Indigenous communities
    - This can be very difficult to absorb, and process the histories and actions that led to collections being within these institutions
  - Large buildings (some older architecture), spread out around a city environment - lots of walking or other travel
    - Plan for Elder's needs, and for those who can't walk or stand for long periods
  - Absorbing lots of new information - draining
  - You will also be working with new people - the reference librarians and other staff
  - Can be long days, find ways to rest and recover in the evenings
  - Important, impactful work, sometimes very personal to your community, family, or yourself - this can add weight
- Think about what you need to take care of yourself, and incorporate that in to your trip
- You might have a variety of interactions with staff, positive and negative
  - Prepare and think about who you can ask for support
- Consider what cultural concerns exist for you or your fellow travelers
  - Needs for a place to pray or smudge before or after collections
    - For example, NMAI Collections Research Center in Culpeper has a specific room for ceremony, prayer or reflection, as well as a wooded area outside
    - Unfortunately, many institutions may not have a designated area or may be unfamiliar with needs
  - If you or your community have protocols, taboos, or other concerns with being close to funerary items or ancestor's remains, this is important to discuss with staff before your visit. This is also a good topic to reach out to friends, colleagues, and others who have visited institutions and might have similar cultural considerations they can advise you about before you make a trip.

Logistical Planning Tips

- City travel
  - Walking, public transit, taxis and rental cars
- Different procedures and processes in each institution
- Security for buildings - like TSA
- Appointments needed?
- Research cards, registration

- These are a few additional logistical items, that our WSU staff have found helpful in planning

- Transportation and city travel
  - Look at maps and guides to the area
  - Ask staff for their suggestions
  - Think through a rough schedule for each day of the trip and decide what will work best for your group
- Remember that if you are visiting multiple institutions, each will have their own procedures for security, making requests, doing research
  - It is good to have some idea before you visit, but you will always learn new things in person
- With the high volume of tourism and people living in cities, there is often added security at institutions
  - Some steps are fairly similar to TSA at the airport
    - Metal detectors, x ray for belongings
  - You may need to show your belongings to a security guard
  - You may need to get a researcher card, sign in, or show identification before doing research
  - Some items, like a notebook, pen/marker, may not be allowed
  - You may not be able to bring in liquids or food to a reading room
- Depending on the institution, it may be that you need an appointment to enter. Other institutions might be open for new researchers at all times during business hours.
- Check what procedures are in place for researcher identification or registration
  - For example, at the Library of Congress, anyone can get a researcher card (which is needed to do research in the main library or in any of the reading rooms)
  - The Library of Congress website has a pre-registration form you can fill out to make your registration process go more quickly (especially for a group, this can save a lot of time)

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Using this Resource

The Digital Stewardship Curriculum is an Open Educational Resource created by the Center for Digital Scholarship and Curation.