

Planning a Research Visit Part 1:

Initial Research Worksheet

Digital Stewardship Curriculum

This worksheet is a document to aid in your planning for a research trip to an outside archive, library, museum, repository, or other organization where you would like to do collections research. The steps in this worksheet will help you define specific goals and outcomes, prepare for your research process and start to create a plan for contacting an institution or multiple institutions. You might complete the steps in this worksheet in a different order than they originally appear, depending on your project needs.

Step 1

Make a list of goals for this research visit, project, or collaboration

- What do you need to do on this research visit?
- What do you hope to accomplish?
- What are the positive outcomes?
- How will you measure success for your goals?
- Consider: Will you need to create a formal agreement or other document to use in your visit to an institution?
- Consider: If you have created a Collaborative Curation Model, or other strategy for collaboration with outside institutions, how will you use it in this

Step 2

Start prioritizing the repositories in which you will conduct research.

- Make a list of the repositories you will visit. If you plan on just visiting one institution, it will be simple. However, if you plan on multiple institutions in one trip, you may need to narrow down your options.
- Make a preliminary schedule of time to see what you can fit, as you prioritize and weigh your options.
- Put your priorities down on paper and choose where you will be doing research.
- Note: The table included at the end of this document is one example of how you might start listing this information. Adapt the table to your needs.

Step 3

Start learning how to use institutional websites and catalogs.

- Getting familiar with websites and catalogs will help you to do initial research and selection, and see how to contact reference staff.

- This checklist includes some suggestions of information you might find on a first pass of an institution's website or catalog:

Information to note on institutional websites and catalogs:

- | | |
|---|---|
| <input type="checkbox"/> Information about the history and mission of the institution | <input type="checkbox"/> Tips on how to use an online catalog |
| <input type="checkbox"/> Hours | <input type="checkbox"/> Frequently asked questions |
| <input type="checkbox"/> Location and directions | <input type="checkbox"/> Educational materials |
| <input type="checkbox"/> List of staff | <input type="checkbox"/> Collection level description like finding aids, registers, collection guides |
| <input type="checkbox"/> Description of services | <input type="checkbox"/> Catalog records for items |
| <input type="checkbox"/> Description of collections | <input type="checkbox"/> Digitized content |
| <input type="checkbox"/> Introduction to research | |
| <input type="checkbox"/> Recent news or projects | |

Step 4

Reach out to staff at the institution.

- Ask initial questions, get suggestions.
- Share your plans for a research visit and intentions for preparation.
- Make connections and get to know the personnel.
- Keep up connections and contact as much as seems prudent for your project.

Step 5

Make a search terms list.

- Make a list of terms to use while searching online catalogs yourself, and to use when working with repository reference staff.
- Often a simple Word document or spreadsheet is best for keeping track of this information.
- Search terms can be keywords, phrases, places, names, family names, languages. Names should include any words and spellings used for your people, by people in your community and by outsiders over time.
- Consider if there have been any anthropologists, ethnographers, or other researchers in your community in the past, who may have donated materials to the institution.
- Continue to add to your list as you continue research.

Step 6

Start researching collections online and using reference help.

- Contact the institution's reference staff.
- Keep track of research and requests, make a digital file folder and/or print folder for information you find online. A spreadsheet or document may also be useful in tracking your research.
- Make note of item or collection identifiers

Step 7

Make research appointments and/or additional contact.

- Depending on the institution, you may or may not need an appointment.
- It is still a good thing to reach out to reference staff more than once in your research planning process.

Table to assist in prioritizing institutions:

Repository	Priority	Reason	Length of Visit	People