

THE AMERICAN CONGRESS DIGITAL ARCHIVES PORTAL PROJECT

WHITE PAPER

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EXECUTIVE SUMMARY

The records of the United States Congress document the democratic process, the development of public policy, and the federal body closest to the people from America's founding through the present day. Held at institutions throughout the country, these materials constitute the history of the largest and most diverse branch of government. Congressional archives are vital for understanding when and how the body wields its constitutional powers, which reflect and shape the character of America. The value of these archives, however, goes beyond the branch itself, as they illustrate multiple narratives related to the country's social, cultural, and political development. The American Congress Digital Archives Portal project was conceived to provide open access to congressional archives by bringing together civically important sources from multiple institutions into a single online platform, illuminating the value of each collection and the relationships among them.

Congressional records are created by numerous collaborating entities, such as the executive and judiciary branches, constituents, and outside groups. The primary materials generated by Congress are separated into official and private records. The official records are created and maintained by committees, and, once inactive, are transferred to the Center for Legislative Archives at the National Archives and Records Administration.¹ The personal papers of Members are materials created or received by an individual Member's office and are donated to institutions large and small throughout the country. The focus of this project has been and continues to be the personal papers of Members.

Personal papers reveal legislative decision making, constituent voices and opinions on public policy topics, political processes and media discourse. Materials are national, regional, and local in scope. From sweeping national policy to local public projects, they document how, what, and why society allocates its resources and expresses its values.

While congressional archives have provided an essential underpinning for scholarship, they are used less than might be expected. Scholarly trends are partly to blame, but significant practical barriers exist for using congressional archives.² Unlike presidential papers, which are centralized in one location with dedicated staff and funding, congressional collections are geographically dispersed among institutions large and small with varying degrees of resources for processing and providing access to the collections. The collections themselves are often extremely large and complex, demanding several years of archival processing. For scholars, collections may be difficult to use, both because of lack of travel funding and the breadth and varying levels of

¹ Karen Dawley Paul, *The Documentation of Congress: Report of the Congressional Archivists Roundtable Task Force on Congressional Documentation* (Washington, DC: Government Printing Office, 1992), 102-20, and "Congressional Papers and Committee Records: Private vs. Public Ownership," in *An American Political Archives Reader*, eds. Karen Dawley Paul, Glenn R. Gray, and Rebecca Johnson Melvin (Lanham, MD: Scarecrow, 2009), 91-94.

² Julian Zelizer, "Congress is Back: Scholars Study its History to Understand its Problems," *The Chronicle of Higher Education*, June 2013.

description in congressional archives. The COVID-19 pandemic has made these problems more acute due to archives closures and travel restrictions.

In this foundations phase of the project, the project team has worked to begin addressing these challenges and to provide easier access to archives for scholars, educators, and the public. The collaborative initiative, led by West Virginia University Libraries, has partnered with the Robert J. Dole Institute of Politics at The University of Kansas and the Robert C. Byrd Center for Congressional History and Education and worked with an Advisory Board composed of leading individuals in the areas of congressional archives, scholarship, and digital archives.

The foundations phase has focused on several areas, including:

1. developing standards and best practices;
2. creating governance structures for this one-year timeline and future phases;
3. developing a web portal that meets user needs and adding archival content;
4. determining digitization priorities via a research survey;
5. conducting usability testing;
6. and communicating and publicizing the project.

This White Paper documents this work, as well as challenges, opportunities, and future plans. The American Congress Digital Archives Portal project has been tremendously successful in the foundations phase. The project team created a compelling [portal prototype](#) that contains more than 500 objects from our institutions, carried out a research survey that prioritizes digitization and user needs, and conducted usability testing to inform future development of the site.

PROJECT WORK

Project partners met twice per month July 2021-April 2022. Partners focused initial efforts on drafting standards and governance documents before contributing content to two prototype sites. Contributions to the selected prototype site continued through March 2022. In August, the partners also drafted a research survey and worked with the project team to draft a usability testing script. The Advisory Board, with the partners, met in June, September, and April. The Committee also reviewed all documentation, the research survey, and provided feedback on the two prototype sites.

Standards and Policies

Before testing the two prototype sites, the partners worked on documentation for standardizing the project's metadata profile and controlled vocabularies, as well as articulating policies around restrictions, intellectual property, privacy, classified materials, and harmful descriptive language. Standards and best practices documentation was reviewed by Advisory Board members, as well

as the WVU Libraries' Systems Development Department and Head of Metadata Services. (See Appendix A for full standards and policies documentation).

Metadata

The partners created a mutually agreed upon metadata profile and controlled vocabularies to bring together the somewhat disparate practices at different institutions. After evaluating metadata used for different projects, the partners used the minimum standards set by the Digital Public Library of America as a model. Additionally, the partners added fields and controlled vocabularies specific to materials in congressional archives.

Partners chose the Dublin Core schema because it is widely adopted and flexible. Partners utilized controlled vocabularies, such as the Library of Congress Name Authority File and Library of Congress Subject Headings, for names of resource creators and subjects. For topics and policy areas, partners adopted a controlled list of 32 broad policy areas maintained by the Congressional Research Service. For geographic locations, the project is using the Getty Thesaurus of Geographic Names. These standards and vocabularies are widely adopted in digital archives preservation and access projects and enable more consistent classification and easier identification of materials.

Restrictions

It is common for congressional collections to have donor restrictions preventing access to materials while they are being processed or while the donor remains in public life. This project will focus on providing access to unrestricted collections first, and as donor restrictions expire, additional materials can be added.

Intellectual Property

Copyright does not apply to materials produced by public servants while carrying out official duties, meaning that a large amount of material in congressional archives can be made openly available online. Materials created outside of official duties, such as diaries, as well as materials received from constituents, outside interest groups, and the press, may be copyrighted and will need to be evaluated on a case-by-case basis. Rights status is clearly identified in the portal, to the best of the contributing institution's ability, using a standard statement from [RightsStatements.org](https://rightsstatements.org). Further, partners developed a take-down policy with instructions for contesting the use of specific materials and a process for potentially removing materials with unclear rights.

Privacy

Some materials, particularly those generated by constituents, may contain personally identifiable or sensitive information (PII) that would prevent open access. Materials containing PII will not be included in the portal or PII will be redacted before submission to the portal. The project

specifically requires that PII contained in constituent issue mail be redacted from materials if the individual is presumed to be less than 100 years old. The 100-year rule is consistent with the [Issue Brief on Confidentiality of Private Information Held in Records of the Federal Government's Executive Agencies](#), approved by the Society of American Archivists (SAA) Council, 2017.

Classified materials

Classified documents occasionally are found in congressional archives and should be declassified before they are added to the portal. The contributing institution will work on declassification by contacting the Information Security Oversight Office (ISOO) at the National Archives. This process was undertaken with one World War II-era document in the foundations phase, resulting in its inclusion in the portal.

Harmful descriptive language

Congressional archives may include existing description that is racist, sexist, homophobic, or uses other offensive terms that may cause harm. Description may have been added by a creator or a previous collection steward. The project encourages partner institutions to remediate such descriptive language by making appropriate changes or adding contextualization before adding materials to the portal.

Governance

The foundations project was structured exactly as outlined in the grant proposal. The project director scheduled meetings, set agendas, and ensured that deadlines were met. Following guidance from the LYRASIS [It Takes a Village: Open Source Software Sustainability](#) Guidebook, the foundations project established a strong record of working toward sustainability, keeping in mind the facets of governance, technology, resources, and community engagement. With the Advisory Board, the partners created a Memorandum of Agreement that outlines expectations of West Virginia University Libraries as the host of the project and the partner institutions as contributors to the project. Two issues discussed at length for the MOA were copyright and removal of materials at a partner institution's request. (See Appendix B for a copy of the MOA).

The portal groundwork is laid with one release and is moving toward expansion. Current funding comes from a single entity but more distributed resourcing is being investigated. Engagement with the congressional archives community is established and ongoing through organizations like the Association of Centers for the Study of Congress and the Society of American Archivists' Congressional Papers Section.

This structure worked for the small size of the foundations project but will need to change for future phases of the project as the project transitions to a harvesting model and additional

partners and content are added. The project team and Advisory Board began thinking about scalability and sustainability early in the project, and these considerations are reflected in the grant proposals for the next project phase, as well as in the “Future Project Phases” section of this paper.

Portal Development

In July 2021, the project team created a list of required and optional functions in the portal. From the list, it appeared that two chosen test portal systems—OmekaS and WVU’s Samvera setup—had similar functionality. Partners began to ingest a small number of archival objects into the portals to test functionality in August.

OmekaS had the promise of bulk ingest, but the partners found it did not always work properly. Plug-ins sometimes did not function and required searching through forums for answers. Further, developers at WVU had less familiarity with plug-ins and could offer minimal support. The appearance was very exhibit-like, and it was difficult to make connections across documents and institutions. It was time-intensive to set up controlled vocabularies, and links would send users to the controlled vocabulary URI (e.g., LOC), rather than linking to other materials in the site with the same controlled term. WVU’s Samvera setup includes a home-grown database and user interface, the Metadata Form Creation System (MFCS), for storing and entering digital objects. It lacks bulk ingest, making it time-intensive to add or edit metadata. Setting up metadata entry forms and controlled vocabularies is also time-intensive, but both were easy to use for all partners. The end-user interface is clean and intuitive, and terms from controlled vocabularies make it easy to create links across objects in the portal.

Primarily because of the appearance and end-user capabilities, the partners and Advisory Board chose to proceed with the Samvera/MFCS application.

Archival Material Selection

Partners chose archival materials for the one-year foundations project based on a few considerations. First, materials needed to be processed as the short project period did not allow time for processing collections. Second, partners considered previously digitized materials, again due to time considerations. Third, partners sought materials dating throughout the twentieth century to better test some of the portal functionality (e.g., OCR) and to provide users with a sense of the breadth of materials that could potentially populate the portal. While partners contributed textual and photographic materials, the portal currently contains no audiovisual or other formats. From past experience with the applications used to create the portal, the applications enable rendering of audiovisual materials for public access. As the project shifts to a harvesting model and partners begin the next phase of work on the portal, audiovisual formats will be included.

Research Priorities Survey

In July, partners began developing the research priorities survey, designed to capture demographic information, research topics and preferences, documentation type preferences, research methods with digital archives, and instruction with congressional archives. Research topic preferences related to Congress were designed using categories from the Dirksen Congressional Center's grants evaluation rubric, and the document types were taken from Cynthia Pease Miller's *Managing Congressional Collections*, published by the SAA.

The survey included 16 questions and was administered using Qualtrics. The project's Advisory Board reviewed and tested the survey. Additionally, the project director applied for and obtained acknowledgement from the West Virginia University Institutional Review Board, and completed a required Human Research course for Social and Behavioral Research Investigators training from the Collaborative Institutional Training Initiative.

Participation in the survey was open to anyone 18 years of age or older and who identified as a faculty member, undergraduate or graduate student, or professional or private researcher with experience or interest in using congressional archives in research; a teacher with experience with or interest in instruction with congressional archives; or a curator, archivist, or administrator with experience with or interest in congressional archives. Participation was voluntary and anonymous. Participants were offered the chance to win 1 of 3 Amazon gift cards in the amount of \$20, which required a participant to optionally share their name and email address. Funding for these incentives was provided by the Association of Centers for the Study of Congress.

The survey collected responses from October-November 2021 and received a total of 126 unique responses. Key findings include:

- The vast majority (97 percent) of respondents identified as archives users, and a significant number (85 percent) have used congressional archives.
- The top-ranked research topics related to Congress were leaders and parties, decision making, and rules and procedures.
- The top participant-provided topics related to congressional policy making (specific policy areas); government operations and politics; and internal congressional processes, procedures, and relationships.
- The top five ranked document types were communications with VIPs; speeches; legislative staff files; committee work files; and calendars, diaries, and journals.
- Most participants who responded indicated they had used digital archives, but the majority had only engaged with basic search rather than more advanced methods (e.g., text mining).
- When searching and browsing digital archives, respondents identified the most helpful categories as topic, person name, and date.

- Most participants who responded have not used congressional or digital archives in instruction but indicated that thematic document sets are the most helpful instructional tool.
- Respondents who have used archives for instruction identified learning outcomes that primarily related to some of the primary source literacy core ideas or to subject knowledge acquisition.

The survey's key findings will shape the next phases of the project. Ranked research topics, as well as topics provided by participants, will guide institutional partners in archival content selection. Similarly, preferred document types will be prioritized in correlation with topic preferences. While most participants have engaged digital archives with basic search, this project recognizes the potential digital archives offer for computational, data-driven approaches to studying archival sources. The project will seek ways to encourage and support innovative methods of inquiry, such as adding a bulk export for search results.

Finally, more accessible congressional archives can support instruction in civics, history, American politics and policy, political communication and more at many levels of education. Most respondents have not used congressional or digital archives in instruction, so the project will also prioritize reaching educators and students and creating value-added resources, such as thematic document sets, and incorporating identified learning outcomes. (See Appendix C for the full results of the Research Priorities Survey).

Usability Testing

Participants who completed the survey had the option of volunteering for a usability testing interview or focus group. Usability testing was conducted on the American Congress Digital Archives Portal prototype website. Testing was conducted by Travis Williamson (Test Administrator) and Danielle Emerling (Project PI and Data Logger). Testing was conducted remotely via Zoom, and user responses were logged in an Excel spreadsheet. These sessions captured each participant's task completion, comments, overall satisfaction, suggestions, and feedback. Each participant received a \$20 Amazon gift card. Funding for these incentives was provided by the Association of Centers for the Study of Congress.

Twenty users participated in either a user interview or focus group. Each session lasted approximately 30-45 minutes. In general, participants found the American Congress Digital Archives Portal to be clean, well organized, and intuitive. With an overall satisfaction rating of 87%, the majority of users viewed the site favorably when compared to other online databases. All participants had prior experience with online database research.

The testing identified some problems, including:

- Confusing positioning of search bar and search filters

- Inconsistency in search results between alternative search paths
- Lack of featured content on homepage to contextualize the scope of the research portal
- Inability to search with quotes
- Lack of date and media type option in drop-down sorting filter
- Confusing naming conventions for search limiters (e.g., “Coverage Congress” and “Coverage Spatial”)
- Too many metadata fields in search results
- Lack of advanced search option
- Inconvenient footer positioning

Most of the participants found the American Congress Digital Archives Portal to be clean, well organized, and intuitive. Overall, users found the search limiters and search bar to be the most valuable features. Implementing the recommendations and continuing to work with users will ensure a continued user-friendly website. (See Appendix D for the full Usability Report).

Communications and Publicity

When the grant was awarded in May 2021, the partner institutions announced the grant through local outlets and social media and received some news coverage. The survey and usability testing raised a great deal of awareness among scholars and archivists, and upon completion of the project, the prototype portal and documentation were shared with listservs, such as H-Net, the American Political Science Association Legislative Section, the Society of American Archivists’ Congressional Papers Section, and the Association of Centers for the Study of Congress.

The PI presented to the Advisory Committee on the Records of Congress, a committee composed of the officials in the U.S. Congress responsible for its records—the Clerk of the House and the Secretary of the Senate; the Senate and House historians; and the Archivist of the United States. House and Senate leadership appoint public members of the committee (December 3, 2021). Partners presented to the Association of Centers for the Study of Congress, an independent, non-partisan alliance of organizations that encourages the study of Congress (February 17, 2022). The PI also submitted a video to the inaugural edition of Coalition for Networked Information’s Project Briefing video series (March 2022).

FUTURE PROJECT PHASES

The completion of the foundations phase of the project provides solid footing for the portal’s expansion and sustainability. Future phases will be dependent on funding and partner commitments.

Phase 2 (2022)

The immediate next steps will focus on developing the portal. The project will continue to develop with open-source applications (Samvera/Fedora) and will contract a web and application

development company to scale the project. The continued use of open-source software ensures that new developments can be contributed back to the community. The portal application will move from WVU Libraries' servers to the cloud, and we will transition from hosting content to harvesting metadata and potentially harvesting content. Standards, policies, and procedures will be updated to reflect the new model.

Phase 3 (2023-2026)

In phase 3, the project will expand partnerships and portal content to complete development for the nation's 250th anniversary in 2026. The goal is to include at least one institution from each state. Partnerships can take two forms at this point. Some partners will be budgeted on a grant and will have specific deliverables and obligations on the grant project. Other partners will express commitment to the project and will participate in some capacity in this or a future phase but will not have specific obligations in phase 3.

With additional partners, the portal will also be increasing the amount of archival content. To do so, the project will use the data from the survey to guide and prioritize content selection. In addition to the content priorities expressed in the survey, the project will focus on the contributions underrepresented people and communities have made in Congress by including archives of women, Hispanic Americans, Black Americans, Asian and Pacific Islander Americans, Indigenous Americans, LGBTQ+ Americans, and Americans with disabilities who have served in Congress. The formats represented in the portal prototype are documents and photographs, but the portal will expand to include audiovisual materials, as well.

Development of the portal will also continue to improve search and faceting features and add advanced search, as well as the ability to bulk export metadata from search results. With the ability to bulk export metadata, the project has the opportunity to support more computational, data-driven approaches to studying the materials in the portal.

During this phase, the project will also initiate programs that support public-facing scholarship and civics and history education programs that use materials from the portal.

With our partners, we will also create a governance plan to ensure the project is sustained and staffed beyond soft funding and beyond 2026.

Phase 4 (2026-forward)

Phase 4 will be about continuing to add partners and content and supporting scholarship and educational initiatives. Development of the portal application will transition more to maintenance. The most important part of this phase will be implementing the governance plan to sustain the portal into the future.

CONCLUSION

This project grew out of past collaborations among the congressional archives community and in the knowledge that congressional archives are underutilized but critical resources for understanding the U.S. Congress, public policy, and American democracy. At a time in which America is experiencing deep political divisions, challenges to democratic norms and values, and when many Americans believe democracy is in crisis, the project takes on a new urgency. It has perhaps never been more important for scholars, educators, and the public to have access to the historical records of the people's branch.

The American Congress Digital Archives Portal foundations project aimed to provide open access to congressional archives from multiple institutions on a single, online platform, and to show the value of aggregating these collections. It has succeeded in both respects and generated positive feedback from potential users. Those interviewed for usability testing recognized the transformational nature of a centralized portal for research, rather than traveling to “scattered” institutions with congressional archives. Online access to congressional archives is especially important for those who would otherwise travel long distances, including rural communities, making it an “issue of equity and access.” And still others encouraged maximizing the amount of materials in the portal, noting that, “the more collections, the more useful this will be.”

Work remains in the project phases ahead to make the American Congress Digital Archives Portal an essential resource for scholarship and education. As the project continues, additions of partner institutions and digitized archival materials, as well as development of more sophisticated functionality and educational resources, will increase its usefulness and make equitable access a reality. Over time, the Portal will make the history of Congress—and its importance in our lives today—more discoverable and accessible for everyone.

Appendix A

Standards and Policies Documentation

Collection Guidelines

The standards and best practices in this document inform the foundations phase of the American Congress Digital Archives Portal project, which utilizes a hosting model for partner content. Standards and best practices are subject to change in future phases of the project as it transitions to a harvesting model.

Scope

The primary materials generated by Congress are separated into official and private records. The official records of Congress are those created, received, and maintained by committees related to legislative, oversight, and executive business. They remain in the custody of the Federal Government, and once inactive, they are transferred to the Center for Legislative Archives at the National Archives and Records Administration. The official records are differentiated from the personal papers of Members of Congress. Personal papers include materials created or received by the individual Member as documentation of his or her career, the organization and functions of the office, and the work of office staff. It is the personal papers of Members of Congress that The American Congress Digital Archives Portal Project seeks to make available.

The ACDAP project will include materials related to legislation, press relations, personal and political activities, and constituent services. Legislative files reveal decision making and the often hidden and complex policy making process on issues both foreign and domestic. Constituent services records contain the voices of people who are rarely documented in the archives, expressing their views on issues important to them and seeking assistance with government programs. Political and press files are instructive for understanding parties, influence, and the ways in which media shape our discourse.

Additional guidance on scope can be found in the Research Priorities Survey Report.

Copyright

In general, copyright lasts for the lifetime of the creator plus 70 years. Materials produced by public servants (e.g., Members of Congress and staff) while carrying out official duties are not covered by copyright. Government reports, such as Congressional Research Service reports, and official House, Senate, and White House photographs are also not covered by copyright.

Examples of things that are not covered by copyright:

- Official press releases
- Speeches given in the course of carrying out duties
- Outgoing correspondence with constituents

Examples of things that are covered by copyright:

- pre- and post-congressional service in the private sector

- correspondence with family and friends
- campaign materials

Things to consider:

Did your Member donate their copyright interest?

Could someone else hold copyright, such as a photographer?

Rights status should be clearly identified, to the best of the contributing institution's ability, using a standard statement such as those found at [RightsStatements.org](https://www.rightsstatements.org).

Privacy

Personally identifiable information (PII) is information including education records, financial transactions, medical history, criminal history, employment history, and information that can be used to identify an individual, such as name, Social Security Number, date of birth, etc. Materials containing PII should not be included in the portal or PII should be redacted before submitting materials to the portal.

The project specifically requires that PII contained in constituent issue mail be redacted from materials if the individual is presumed to be less than 100 years old. The 100-year rule is consistent with the [Issue Brief on Confidentiality of Private Information Held in Records of the Federal Government's Executive Agencies](#), approved by the Society of American Archivists Council, 2017.

Classified National Security Information

Classified documents should be declassified before they are added to the project. The Information Security Oversight Office (ISOO) at the National Archives [has resources](#) to help identify classified national security information, and ISOO should be contacted if you believe you have a document(s) with this information.

Harmful Descriptive Language

Congressional archives may include existing description that is racist, sexist, homophobic, or use other offensive terms that may cause harm. Description may have been added by a creator or a previous collection steward. The project encourages partners to remediate such descriptive language by making appropriate changes or adding contextualization before adding materials to the portal.

Digital File Requirements

Existing born-digital or digitized files

For existing digitized and born-digital materials, the project will accept files at the standards at which they were digitized, with the exception of materials of such poor quality they will not meet the project’s goals. Newly digitized materials for the project should follow the digitization guidelines below.

Digitization Guidelines

The following standards are informed by the [Federal Agencies Digitization Guidelines Initiative](#) (FADGI) and the [Library of Congress Recommended Formats Statement](#).

Material Type	Resolution	Color	File Format	Min. Bit Depth
Textual	Minimum 400 dpi; 600 preferred	Color preferred to grayscale	Uncompressed TIFF	24
Visual (e.g., photographic, artwork, maps, cartoons, posters)	Minimum 600 dpi	Color preferred to grayscale	Uncompressed TIFF	24
Audio	44.1 kHz/16 bit or higher MP3@192 kbps	n/a	Uncompressed WAV or MP3 (access copy)	n/a
Video	10 bit	n/a	Uncompressed MOV Or MPEG-4 OR MP4 (access copy)	n/a

File Naming Convention

File names should identify the repository and collection and reflect the order of the files. Repositories may add additional information to a file name to reflect local protocols. It is suggested, but optional, to include an indicator for the box and folder number. File names should NOT contain special characters (e.g., question marks, exclamation marks, etc.) Files should be numbered sequentially. Examples of file names with the required identifying information are below:

Single page documents:

In the examples below, the file name contains an identifier for the institution and the collection, followed by box and folder numbers. The objects are numbered sequentially with a 4-digit number.

WVUL_am2862_b001_f01_0001
WVUL_am2862_b001_f01_0002
WVUL_am2862_b001_f01_0003

For multiple page documents, add a decimal to the end of the file name. This will keep the pages in order when the system makes a combined PDF for display. The example below represents a 4-page document.

WVUL_am2862_b001_f01_0004.01
WVUL_am2862_b001_f01_0004.02
WVUL_am2862_b001_f01_0004.03
WVUL_am2862_b001_f01_0004.04

Metadata

REQUIRED FIELDS

1. Contributing institution

Definition: A name given to a contributing institution

Repeatable: No

Required: Yes

Application: Contributing Institution will be added by the project administrators. (In MFCS, it is a separate form/registry that includes the fields Agency Code, Repository Name, Email, Website, Phone, and Collection Information.) For the Agency Code, we recommend using the [MARC Code for Organizations](#) or a 4-letter code that is unique to your institution.

Examples:

Agency Code: WvMtURHC

Repository Name: West Virginia University Libraries

Email: danielle.emerling@mail.wvu.edu

Website: <https://wvrhc.lib.wvu.edu/>

Phone: 304-293-3536

Collection Information: The Modern Congressional and Political Papers

Collection at the West Virginia & Regional History Center focuses primarily on documentation of national and state policy and politics since about World War II

to the present. This includes documentation of the modern U.S. Congress, the policy process, and the political landscape at the state and national levels. The unit collects, preserves, and makes available the papers of members of Congress, political parties, and state and local political actors. Strengths of the collecting area include the papers of Senator John D. (Jay) Rockefeller IV, Congressman Nick Joe Rahall II, Congressman Harley O. Staggers Sr., Senator Matthew Mansfield Neely, Senator Harley Martin Kilgore, and Congressman and Governor Arch A. Moore Jr.

Mappings:

Simple Dublin Core		MODS
dc:contributor		<name><namePart>

2. Title

Definition: A name given to the resource

Repeatable: Yes

Required: Yes

Application: Ideally, titles will follow DACS but will be accepted in any form. For bill titles, include the legislation number and title. Congress.gov is a good reference.

Examples:

- Photograph of Senators Bob Dole and Robert Byrd
- Correspondence from Morgantown, W.Va., constituent to Senator Rockefeller
- S.674 - Children’s Health Insurance Provides Security (CHIPs) Act of 1997
- Dear Colleague letter from Representative Nick Rahall to Representative John Dingell

Mappings:

Simple Dublin Core		MODS
dc:title		<titleInfo><title>

3. Date

Definition: Date of creation of the physical resource.

Repeatable: Yes

Required: Yes

Application: Format dates according to W3CDTF (ISO 8601). Only dates entered in this format will be indexed, but human readable dates will be displayed with the object.

- If you only have an approximate date, it is recommended to enter the date twice: once in machine-readable standard W3CDTF format (e.g., “1970-1980”), and a second time in a human-readable format (e.g., “approximately 1975”).
- If you do not have a date for the resource, use a broad range in the W3CDTF format (e.g., 1970-1990), and use “undated” for the human-readable format.
- For uncertain dates, use “approximately” rather than “circa.”

Examples (using the recommended ISO 8601 (W3CDTF) format YYYY-MM-DD):

- For a known date: 1950 *OR* 1950-01 *OR* 1950-01-04
- For a known date range: 1950-03-03/1950-04-17 *OR* 1950-1955
- For an approximate date: 1950/1955 *AND* approximately 1951
- For undated: 1950/1970 *AND* undated
- For more examples see <https://www.w3.org/TR/NOTE-datetime>

Mappings:

Simple Dublin Core		MODS
dc:date		<originInfo><dateCreated>

4. Creator

Definition: An entity primarily responsible for making the resource. Could be a person, family, or corporate entity.

Repeatable: Yes

Required: Yes, if known

Application: Before creating a local form of the creator’s name, check the following sources listed in order of preference:

- LCNAF
- If the creator is not found in the above sources, create a local form by following the format of LCNAF.

Examples:

- United States. Congress. Senate. Special Committee Investigating the National Defense Program
- Dole, Robert J., 1923-

Mappings:

Simple Dublin Core		MODS
dc:creator		<name><namePart>

5. Rights

Definition: Information about copyright or other restrictions on the use of the resource.

Repeatable: Yes

Required: Yes

Application: Select a standardized statement at RightsStatements.org.

Choose a statement from RightsStatements.org. If further elaboration is required, a free-text rights field is available.

Mappings:

Simple Dublin Core		MODS
dc:rights		<accessCondition>

6. Language

Definition: The language of the resource.

Repeatable: Yes

Required: Yes, for textual resources

Application: Use the 3-letter code from ISO 639-3.

Examples: eng; spa; deu; zxx (no linguistic content)

Mappings:

Simple Dublin Core		MODS
dc:language		<language><languageTerm>

7. Subject (Policy)

Definition: The policy area represented in the resource.

Repeatable: Yes

Required: Yes

Application: Select from 32 broad terms in the [Policy Area vocabulary](#).

Mappings:

Simple Dublin Core		MODS
dc:subject		<subject> <topic>

8. Coverage (Congress)

Definition: The Congress in which the resource was created.

Repeatable: No

Required: Required

Application: Select from list of [Congresses](#) (e.g., 93rd (1973-1974))

Mappings:

Simple Dublin Core		MODS
dc:coverage		<subject> <temporal>

9. Type

Definition: The nature or genre of the resource.

Repeatable: Yes

Required: Yes

Application: Use [DCMI Type vocabulary](#).

- text
- image
- physical object
- sound
- moving image

Mappings:

Simple Dublin Core		MODS
dc:type		<typeOfResource>

RECOMMENDED AND OPTIONAL FIELDS

10. Identifier (local)

Definition: An unambiguous reference to the resource within a given context.

Repeatable: No

Required: Recommended

Application: Identifier must be unique within your repository.

Example: wvul_am1500_b6_f01_0025a

Mappings:

Simple Dublin Core		MODS
dc:identifier		<identifier>

11. Description

Definition: A free text account of the resource.

Repeatable: Yes

Required: Optional

Application: Provide an account of the individual resource.

Mappings:

Simple Dublin Core		MODS
dc:description		<abstract> <note> <table of contents>

12. Subject

Definition: The topic(s) of the resource.

Repeatable: Yes

Required: Recommended

Application: Typically, the subject will be represented using keywords, names, or key phrases. Use the following sources for subjects:

- Controlled vocabularies - LCSH, AAT, LCNAF, VIAF

For guidance on how to use LCSH, see <https://www.loc.gov/catworkshop/lcsh/>.

Examples:

- Names (personal): Dole, Robert J., 1923-
- Names (corporate): United States. Congress. Senate. Special Committee Investigating the National Defense Program
- Topics: Armenian Genocide, 1915-1923

Mappings:

Simple Dublin Core		MODS
dc:subject		<subject> <topic> <name>

		<occupation> <geographic> <temporal> <titleInfo>
--	--	---

13. Record Type

Definition: The nature or genre of the resource specific to congressional material types.

Repeatable: Yes

Required: Recommended

Application: Use [Getty Research Institute Art and Architecture Thesaurus](#).

Examples:

- Legislation
- Press releases
- Memorandum

Mappings:

Simple Dublin Core		MODS
dc:type		<typeOfResource>

14. Subject (location)

Definition: Spatial characteristics of the resource.

Repeatable: Yes

Required: Recommended

Application: Geographic location relevant to the original item. Use [TGN, political entities](#).

Examples:

- Turkey (nation)
- Kansas (state)

Mappings:

Simple Dublin Core		MODS
dc:coverage		<subject> <geographic> <hierarchicalGeographic>

		<geographicCode> <cartographics>
--	--	-------------------------------------

15. Extent

Definition: The size or duration of the resource.

Repeatable: Yes

Required: Optional

Application:

Example: 4 pages; 2 minutes

Mappings:

Simple Dublin Core		MODS
dc:format		<physicalDescription><extent >

16. Publisher

Definition: An entity responsible for making the original resource available (not the institution publishing the digital resource).

Repeatable: Yes

Required: Optional

Application: Transcribe the publisher's name from the resource exactly as written. If no publisher is given, leave this field blank.

Examples:

U.S. Government Publishing Office

Mappings:

Simple Dublin Core	CONTENTDM	MODS
dc:publisher	Publisher	<originInfo><publisher>

Appendix B

Memorandum of Agreement

Memorandum of Agreement

American Congress Digital Archives Portal/West Virginia University Libraries

Between _____ and the West Virginia University Board of Governors on behalf of West Virginia University and its American Congress Digital Archives Portal/West Virginia University Libraries.

I/we, _____, affirm that I/we own the property described herein and give the American Congress Digital Archives Portal or its successors permission to host and publish online the following items in perpetuity:

I/we make every effort to ensure I/we have appropriate rights to provide access to content, including those granted under sections 107 (“Fair Use”) and 108 (preservation) of the U.S. Copyright Law and that rights status will be clearly identified. The advisory board will review contested materials and may cease providing access to material deemed to be in copyright.

I/we understand that materials hosted by the American Congress Digital Archives Portal are freely accessible for research, teaching (including distribution to classes), and private study. Users may reproduce materials (print, make copies, download) from the American Congress Digital Archives Portal without prior permission, on the condition that materials are properly cited and attributed to the source on all copies.

I/we understand that materials and metadata hosted by the American Congress Digital Archives Portal may be harvested, shared, and published with other collaborative, open access projects on the condition that materials are properly cited and attributed to the source on all copies.

I/we understand that the materials and metadata hosted by the American Congress Digital Archives Portal may be used and transformed for data and text analysis and other computational or machine learning research methods.

I/we understand that metadata hosted by the American Congress Digital Archives Portal will be made available without copyright restrictions and will be provided free and unencumbered to for users to harvest, collect, and modify.

I/we understand that I/we retain all rights to the materials contributed by our institution.

I/we understand that I/we may remove materials and/or metadata from the American Congress Digital Archives Portal in rare circumstances by submitting a written request to the project directors and by identifying the materials and/or metadata to be removed. The project advisory board will review petitions.

Partner Representative

Signed: _____ Date: _____

West Virginia University Representative

Signed: _____ Date: _____

Appendix C

Research Priorities Survey Report

Executive Summary

The American Congress Digital Archives Portal project seeks to aggregate congressional archives from multiple institutions into a single, online platform to provide more equitable access to collections and support for research and instruction. Congressional archives contain a range of materials and topics, and modern collections can number in the thousands of linear feet, meaning institutions are often not positioned to digitize entire collections. Further, the portal seeks to prioritize high quality materials most likely to have significant value for research and instruction. To better inform the selection of archival materials in future iterations of the portal and to form a more precise understanding of user needs, the project team conducted a research priorities survey, followed by user experience interviews and focus groups (see the separate Usability Report for results from interviews and focus groups). This report outlines the survey procedures, key findings, and recommendations, and includes the full list of survey questions and responses.

The research priorities and user experience survey was designed to capture demographic information, research topics and preferences, documentation type preferences, research methods with digital archives, and instruction with congressional archives. Research topic preferences related to Congress were designed using categories from the Dirksen Congressional Center's grants evaluation rubric, and the document types were taken from Cynthia Pease Miller's *Managing Congressional Collections*. The survey included 16 questions and was administered using Qualtrics. The project's Advisory Board reviewed and tested the survey. Additionally, the PI applied for and obtained acknowledgement from the West Virginia University Institutional Review Board, and completed the Collaborative Institutional Training Initiative's Human Research course for Social and Behavioral Research Investigators.

Participation in the survey was open to anyone 18 years of age or older and who identified as a faculty member, undergraduate or graduate student, or professional or private researcher with experience or interest in using congressional archives in research; a teacher with experience with or interest in instruction with congressional archives; or a curator, archivist, or administrator with experience with or interest in congressional archives. Participation was voluntary and anonymous. Participants were offered the chance to win 1 of 3 Amazon gift cards in the amount of \$20, which required a participant to optionally share their name and email address. Funding for gift card incentives was provided by the Association of Centers for the Study of Congress.

The survey was distributed by partners and Advisory Board members to individual institutions' lists of congressional researchers and to the following list serves: the Society of American Archivists' Congressional Papers Section, the Association of Centers for the Study of Congress, H-Net (H-Pol and H-FedHist), and the American Political Science Association

Legislative Studies Section. The survey collected responses from October-November 2021 and received a total of 126 unique responses.

Key findings include:

- The vast majority (97 percent) of respondents identified as archives users, and a significant number (85 percent) have used congressional archives.
- The top-ranked research topics related to Congress were Leaders and Parties, Decision Making, and Rules and Procedures.
- The top participant-provided topics related to Congressional Policy Making (specific policy areas); Government Operations and Politics; and Internal Congressional Processes, Procedures, and Relationships.
- The top five ranked document types were communications with VIPs; speeches; legislative staff files; committee work files; and calendars, diaries, and journals.
- Most participants who responded indicated they have used digital archives, but the majority have only engaged with basic search rather than more advanced methods (e.g., text mining).
- When searching and browsing digital archives, respondents identified the most helpful categories as topic, person name, and date.
- Most participants who responded have not used congressional or digital archives in instruction but indicated that thematic document sets are or would be the most helpful instructional tool.
- Respondents who have used archives for instruction identified learning outcomes that related to the primary source literacy core ideas or to subject knowledge acquisition.

The survey's key findings will shape the next phases of the project. Ranked research topics, as well as topics provided by participants, will guide institutional partners in archival content selection. Similarly, preferred document types will be prioritized in correlation with topic preferences. While most participants have engaged digital archives with basic search, this project recognizes the potential digital archives offer for computational, data-driven approaches to studying archival sources. The project will seek ways to encourage and support innovative methods of inquiry, such as adding a bulk export for search results. Finally, more accessible congressional archives can support instruction in civics, history, American politics and policy, political communication and more at many levels of education. Most respondents have not used congressional or digital archives in instruction, so the project will also prioritize reaching educators and students and creating value-added resources, such as thematic document sets, and incorporating identified learning outcomes.

Research Survey Request for Participation Letter

Dear participant,

This is a request for your participation in a research project that seeks to digitize congressional archives from institutions around the country and make them available on a single website. In this project, "congressional archives" refer to the primary sources created by congressional offices that document the work of the U.S. Congress and individual Members. The project will expand access to historical collections and increase research value by providing context and linkages among them. This project is being conducted by Danielle Emerling and Travis Williamson in the West Virginia University Libraries as part of a National Endowment for the Humanities grant-funded project, The American Congress Digital Archives Portal.

You should participate if you are a faculty member, undergraduate or graduate student, or professional or private researcher with experience or interest in using congressional archives in research; a teacher with experience with or interest in instruction with congressional archives; or a curator, archivist, or administrator with experience with or interest in congressional archives. You must be 18 years of age or older to participate. You will be given the option to enter to win 1 of 3 Amazon gift cards in the amount of \$20 each.

If you decide to participate, you will be asked to complete a survey that asks you about your: 1) professional status and discipline; 2) areas and topics of research; 3) documentation types used in the archives; 4) research methods with digital archives; and 5) instruction with congressional archives. Your participation in this project will take approximately 30 minutes.

Your participation in this project will be kept as confidential as legally possible. All data will be reported in the aggregate. Your participation is entirely voluntary. You may skip any question that you do not wish to answer, and you may stop participating at any time. For students, your class standing will not be affected if you decide not to participate or withdraw. The West Virginia University Institutional Review Board's acknowledgment of this project is on file with the WVU Office of Human Research Protections.

If you have any questions about this research project, please feel free to contact the Primary Investigator at (304) 293-2574 or by email at danielle.emerling@mail.wvu.edu. Additionally, you can contact the WVU Office of Human Research Protections at (304) 293-7073.

We hope that you will participate in this research project, as it could help us better understand the uses of congressional archives in research and instruction as we build a digital research portal. Thank you for your time and consideration.

Sincerely,

Danielle Emerling
Primary Investigator, Associate Curator,
Congressional and Political Papers Archivist

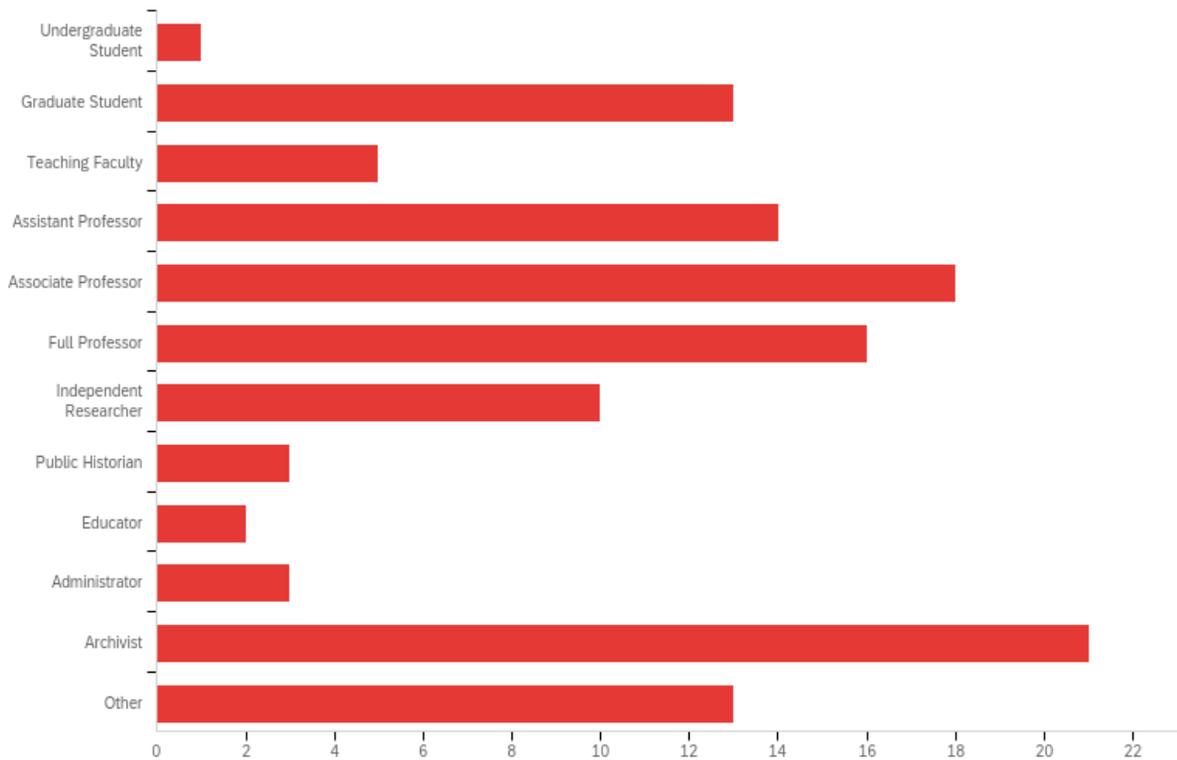
Travis Williamson
User Interface Designer

Research Survey Questions and Responses

Demographic Questions

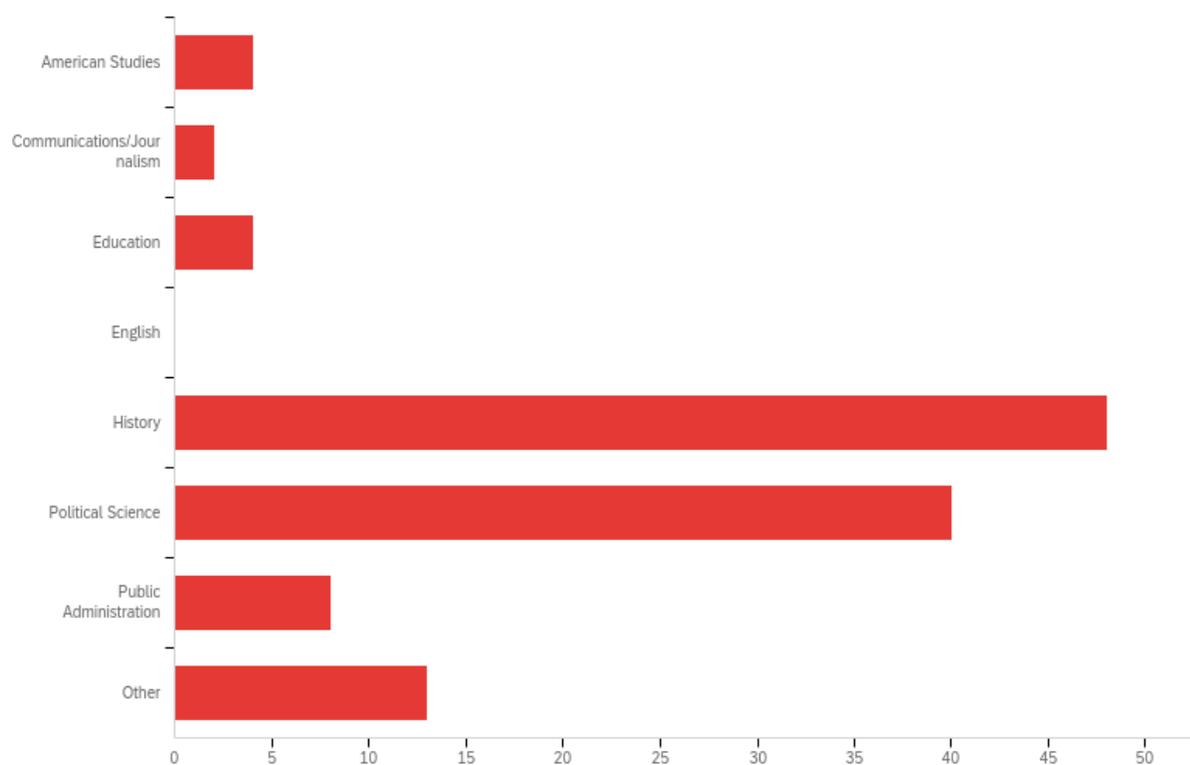
1. What is your current academic or professional status?

Question 1 received 119 responses. Those who responded “other” included retired and Emeritus professor, biographer, documentary filmmaker, non-profit public policy and advocacy director, and state government editor.



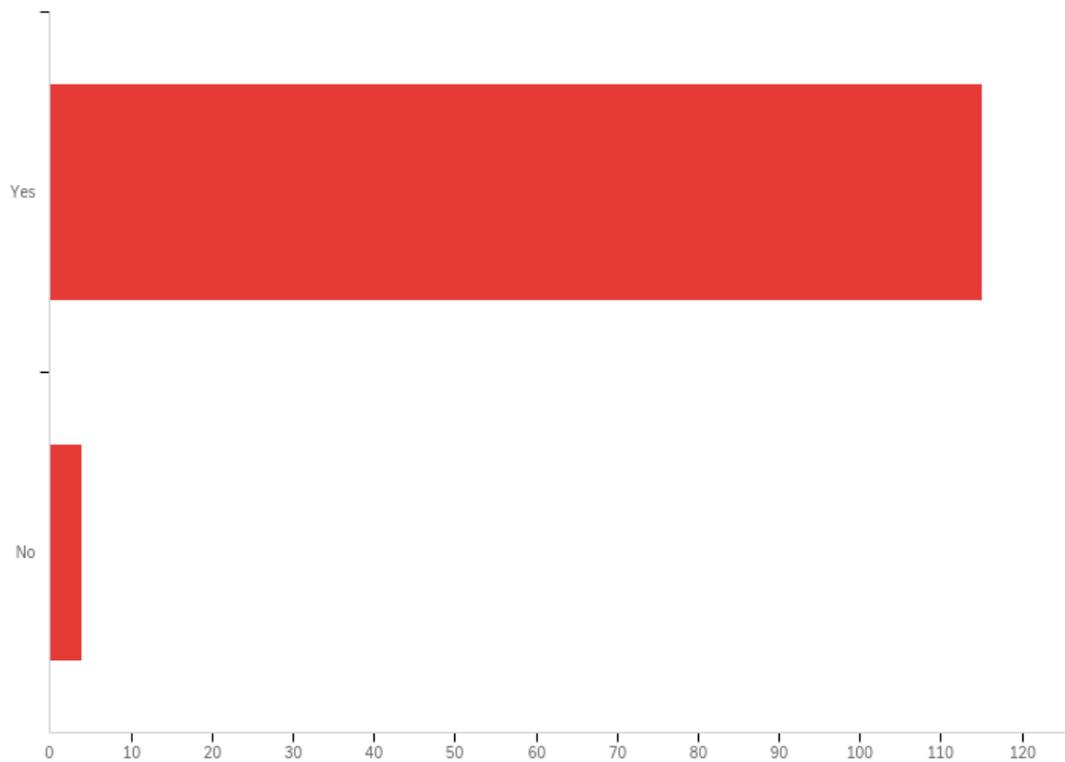
2. What is your primary discipline?

Question 2 received 119 responses. The majority of respondents identified in the disciplines of History (40 percent) and Political Science (34 percent). Those who responded “other” identified in the disciplines of library science, law, public health, Jewish studies, women’s studies, and more specific historical disciplines (e.g., Asian American history).



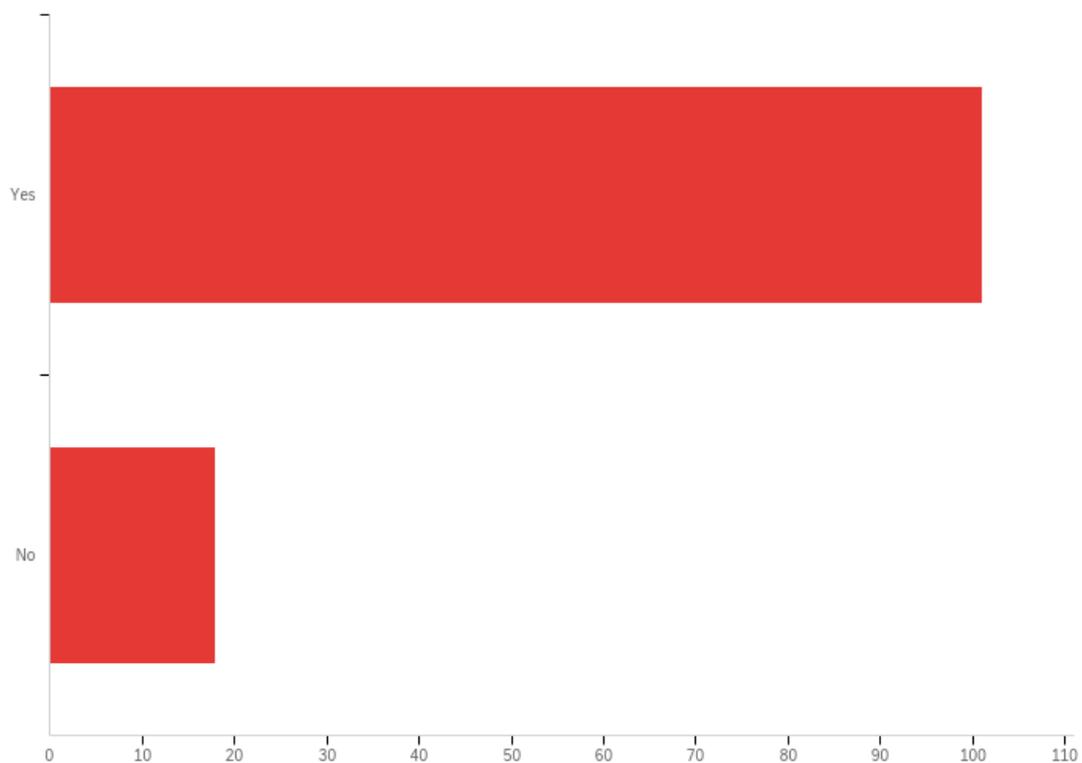
3. Have you used archives for research or instruction?

Question 3 received 119 responses. About 97 percent of respondents indicated they have used archives for research or instruction.



4. Have you used congressional archives for research or instruction?

Question 4 received 119 responses. About 85 percent of respondents indicated they have used congressional archives for research or instruction.



Research Questions

5. What topics, issues, or people have you studied or would you like to study using congressional archives?

Question 5 received 94 responses. Responses are categorized using the Policy Areas list created by the Congressional Research Service, as well as a section on biography/individual collections.

POLICY AREAS

Agriculture and Food

- Agricultural and environmental issues (research station funding for forestry or horticulture)
- Agriculture committee
- Agricultural policy
- Farm board
- Food insecurity
- Food stamps (2)
- Universities and Point Four/USAID
- USDA

Armed Forces and National Security

- Debates about security (terrorism and counterterrorism policy)
- Korean War
- Military policy
- Missing in Action
- Prisoners of War (2)
- Veterans' Affairs
- Vietnam War (2)

Arts, Culture, Religion

- National Endowment for the Arts

Civil Rights and Liberties, Minority Issues

- Boston Busing Crisis
- Citizens' rights
- Civil rights (5)
- Civil rights (agenda setting 1933-72)
- Civil rights (constituent views recorded through correspondence)
- Civil Rights (The Black Freedom Struggle, Reconstruction)
- Desegregation
- Disability (ADA) (3)
- Emancipation during the U.S. Civil War
- Fair housing
- Race
- Title IX
- Voting rights
- Women's issues
- Women's rights legislation

Congress

- Administration and bureaucratic organization
- Communications in Congress
- Congress history
- Congress
- Congress's delegation of authority to the presidency
- Congressional biography, leadership, politics
- Congressional committee activities (ethics investigations and appropriations committee processes)
- Congressional committees and policymakers
- Congressional committees, chairs, party leaders
- Congressional communications
- Congressional reform
- Constituent complaints

- Constituent relations
- Constituent service, constituent correspondence, congressional mail logs
- Cooperation and collaboration in Congress
- Distribution of power in Congress historically
- Early history of the Congress (Senate 1789 through the early 1830s)
- Historical decision-making
- Historical information on bills and their passing
- How a bill becomes a law
- How Senator's office works
- Legislation (general) (4)
- Media effect on perception of Congress (and vice versa)
- Members' personal schedules
- Policy Process

Crime and Law

Enforcement

- Gun policy
- Gun politics
- Department of Justice
- Justice issues

Energy

- Energy history

Environmental Protection

- Environmental policy/environmentalism (natural resources, energy, water history) (5)
- Underground nuclear testing in Alaska (Pacific world as disaster-prone region in the age of human-driven environmental changes)
- Non-profits & advocacy history (conservation, environmentalism, environmental justice)

Finance and Financial Sector

- Economic development history
- Economic policy

Government Operations and Politics

- Campaign committees
- Campaign finance reform
- Campaigns and elections (2)
- Campaigns staff and teams
- Candidate recruitment

- Congressional parties, congressional leadership, congressional organization
- Congressional politics
- Election fraud, corruption
- Elections
- Elections (celebrity recruitment)
- Elections, political parties
- E-voting
- Creation of the Puerto Rico resident commissioner position and the resident commissioner's subsequent role in debates over statehood for Hawaii and Alaska and creating delegate positions to represent the other territories
- Executive privilege (from Truman to Trump) and Congress response
- Federal Agencies
- Gerrymandering
- Intergovernmental affairs (either among different branches of government, different levels of government)
- Intraparty factions in the House

- Intraparty politics
- Leadership
- Leadership elections
- Leadership races in Congress
- Lobbying
- Partisanship
- Party politics
- Presidency (2)
- President Nixon's "Southern Strategy"
- Presidents and Members of Congress from ~1865 – 1898
- Relations between committee chairs and ranking members
- Relations between committee leaders and party leaders
- Religion and politics
- Supreme Court
- Vice presidency

Health

- Health care

International Affairs

- American South and U.S. Foreign Relations
- Anti-apartheid movement in the United States (sanctions against South Africa, liberation movements in Africa)
- Communism

- Foreign aid
- Foreign policy (Bosnia)
- Foreign Relations
- Human Rights
- Korean Issues
- Overseas technical assistance during the Cold War
- Peace Corps
- Recognition of Cuba in the 1890s discussions
- U.S. diplomacy in the Civil War Era
- U.S. foreign relations (legislation and interest group lobbying on human rights, foreign aid, foreign trade, religious persecution, and national security issues)
- World War II reparations

Labor and Employment

- Deindustrialization
- Labor law
- Labor relations
- Right to work

Native Americans

- American Indian History (2)

Public Lands and Natural Resources

- Development (Natural resources)
- Coastal areas

Science, Technology, Communications

- Technology-related issues

Social Sciences and History

- Compensating former enslavers debates throughout U.S. history
- Early American state building
- Political history (3)
- Regional history (American South, Georgia)
- Social policy

Social Welfare

- New Deal policy

Taxation

- Tax policy

Transportation and Public Works

- Tourism
- Transportation (funding, interest groups, interstates)

BIOGRAPHY/INDIVIDUAL COLLECTIONS

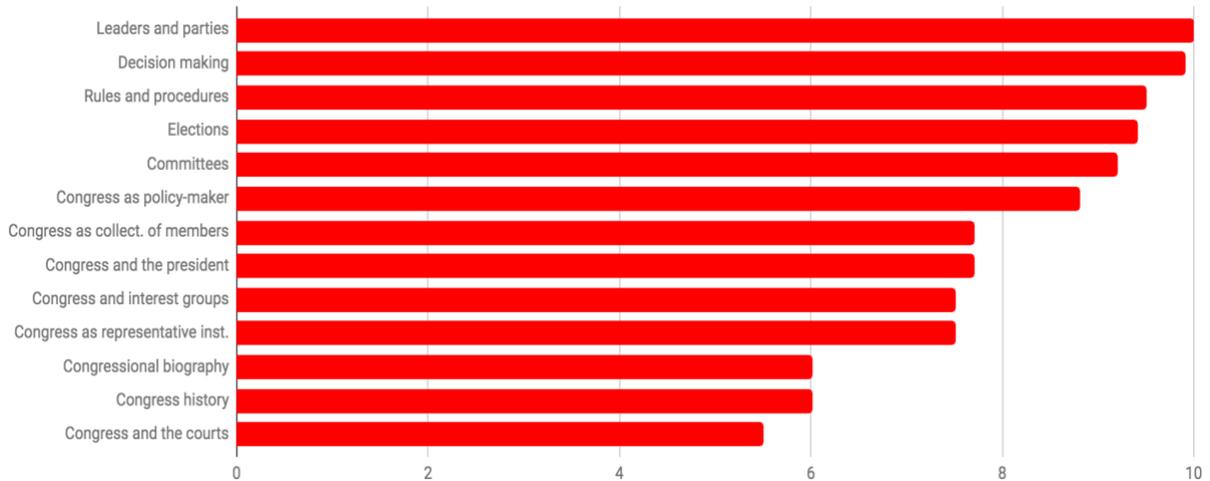
- Albert Gore Sr.
- Andrew Jackson
- Asian Pacific American Members of Congress
- Barry Goldwater
- Birch Bayh (2)
- Bob Dole (6)
- Burton K. Wheeler

- Carl Albert
- Clifford Hope
- Congressman
Floyd J. Fithian
- Congressman John
A. Quitman
- Daniel P.
Moynihan
(Senatorial
procedures)
- Edith Green (2)
- Edmund Muskie
- Edward M.
Kennedy
(biography)
- Edward W. Brooke
- Everett Dirksen
- Fred Harris
- George
Washington
- Harry Reid
(Nevada political
movements in the
late 20th-century)
- Henry Jackson
- House Speakers
(Rayburn,
McCormack,
Albert, O'Neill,
Wright, Gingrich)
- J. William
Fulbright
- James Donald
Cameron
- James Eastland
- Jamie Whitten
- John C. Stennis
- Martin Van Buren
- Mike Mansfield
- Mike McCormack
- Minority party
leadership (Michel,
Gephardt)
- Orville Freeman
- Page Belcher
- Patsy Mink
- Paul Simon
- Richard Nixon
(biography)
- Richard Russell (2)
- Southern
politicians
- Tip O'Neill
(biography)
- Tom Eagleton
- Tom Foley (2)
- Tom Steed
- Walt Horan
- Warren Magnuson
- Wayne Morse
- West Virginia
congressional
figures

6. If you primarily study Congress, rank your research topic priorities related to Congress by dragging and dropping the options below.

Question 6 received 86 responses. The topic areas were ranked as follows:

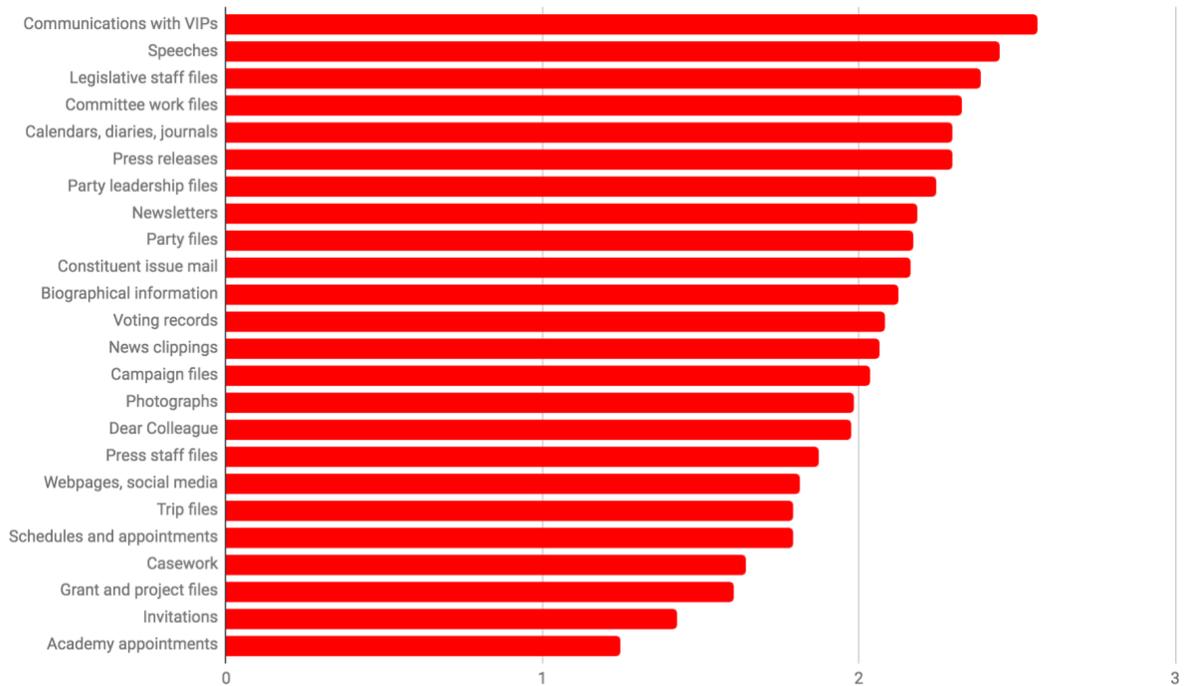
1. Leaders and parties (e.g., elected leaders, leadership activities, party organizations, party continuity and change)
2. Decision making (e.g., types of decisions, determinants of voting, bargaining)
3. Rules and procedures (e.g., law-making processes, congressional reform, how a bill becomes law)
4. Elections (e.g., candidate recruitment, campaign finance, tactics, voter behavior, electoral outcomes)
5. Committees (e.g., evolution of committee system, assignment process, committee leadership, policy making in committee, staff, committee reform)
6. Congress as policy-maker (e.g., case studies)
7. Congress as a collection of members/staff (e.g., collective characteristics, cultural norms)
8. Congress and the president
9. Congress and interest groups
10. Congress as a representative institution (e.g., constituent communications, public perceptions of Congress, impact of technology, demography)
11. Congressional biography
12. Congress history - general (e.g., Constitutional underpinnings, institutional evolution)
13. Congress and the courts



7. Below are common document types found in congressional archives. Please indicate the importance of each of these document types for your research.

Question 7 received 95 responses. The top 10 ranked document types are:

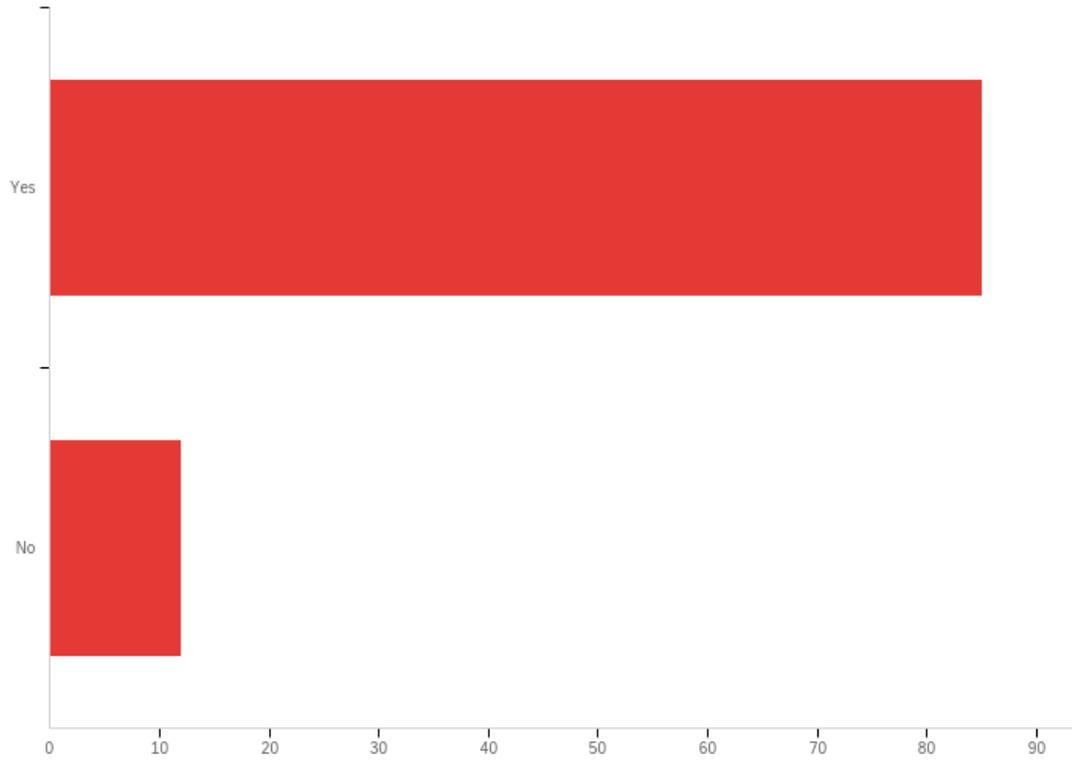
1. Communications with VIPs
2. Speeches
3. Legislative staff files
4. Committee work files
5. Calendars, diaries, journals
6. Press releases
7. Party leadership files
8. Newsletters
9. Party files
10. Constituent issue mail



Research Methods with Digital Archives Questions

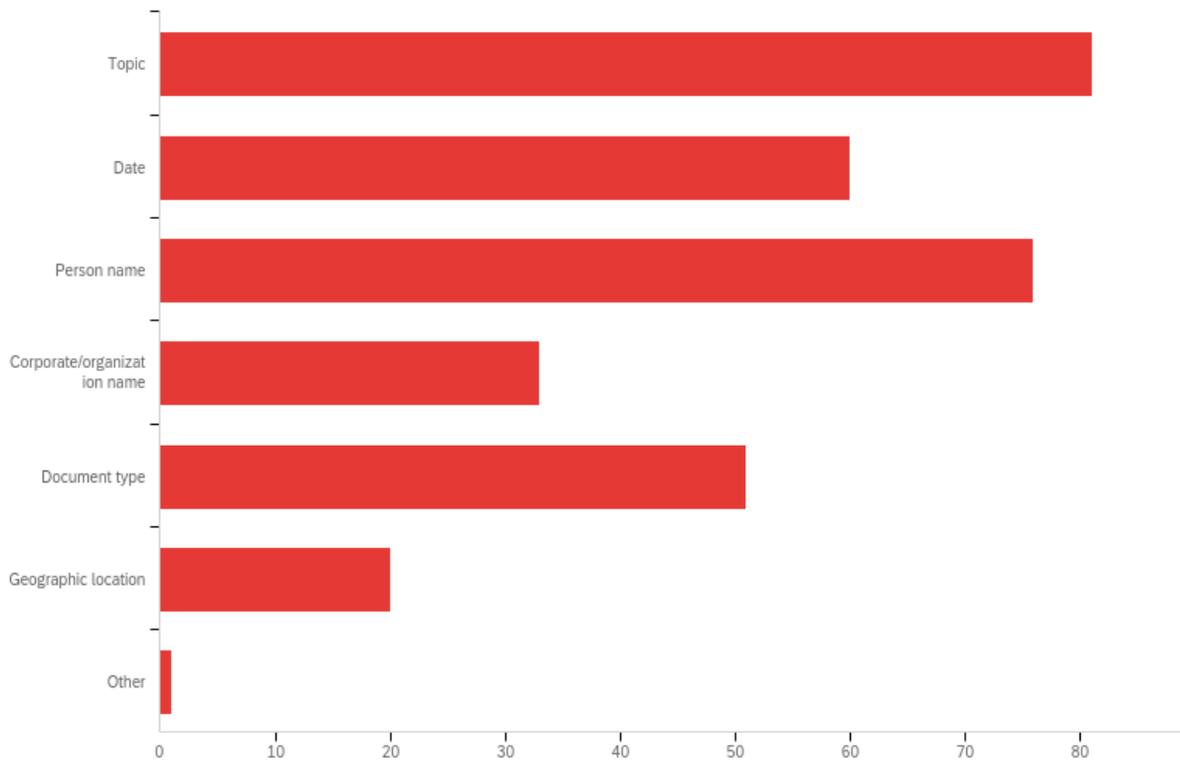
8. Have you used digital archives (e.g., archival materials digitized and made available online) in your research?

Question 8 received 97 responses.



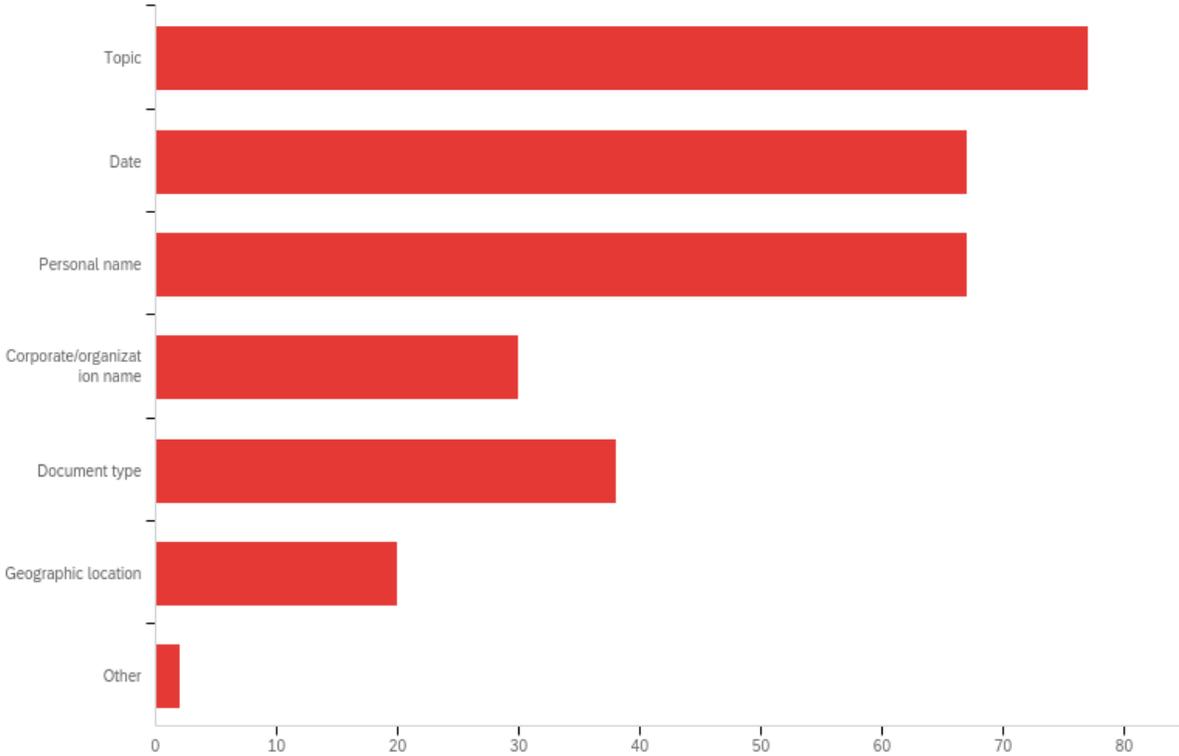
9. Which categories do you use to search digital archives. Please choose all that apply.

Question 9 received 91 responses.



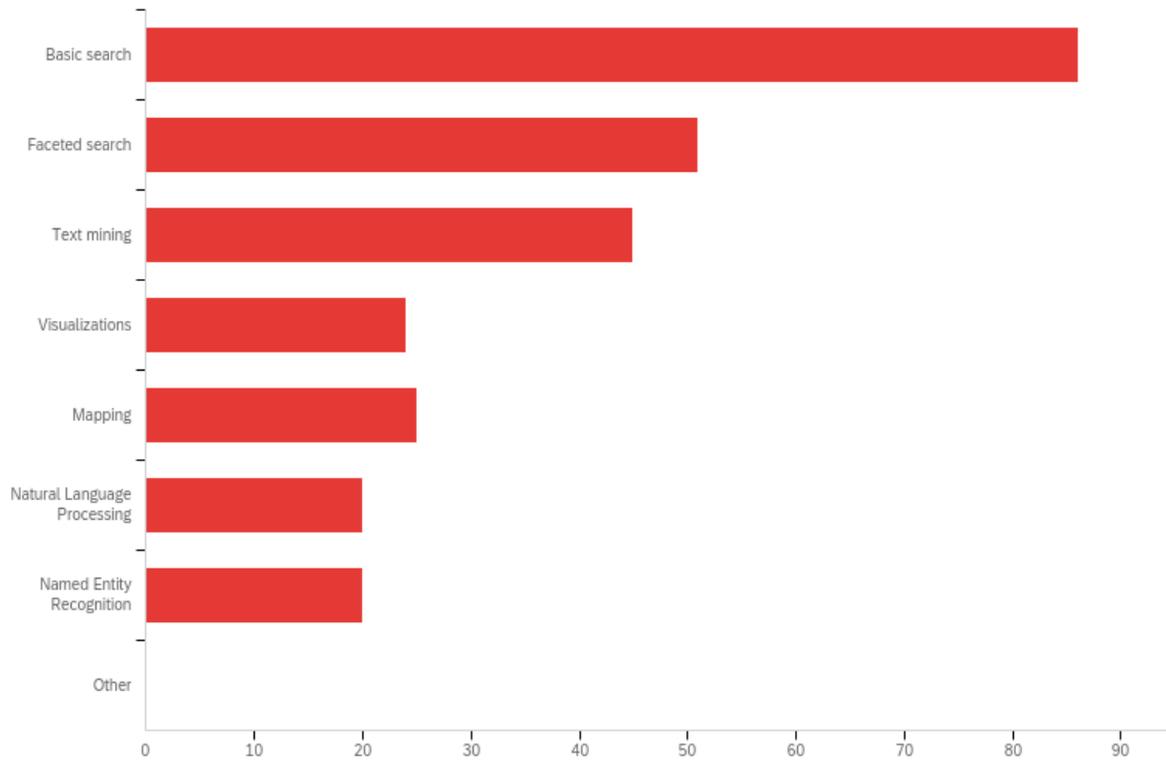
10. Which categories do you use to browse digital archives? Please choose all that apply.

Question 10 received 91 responses.



11. Choose the methods you have used or want to use for analyzing digital archives. Please choose all that apply.

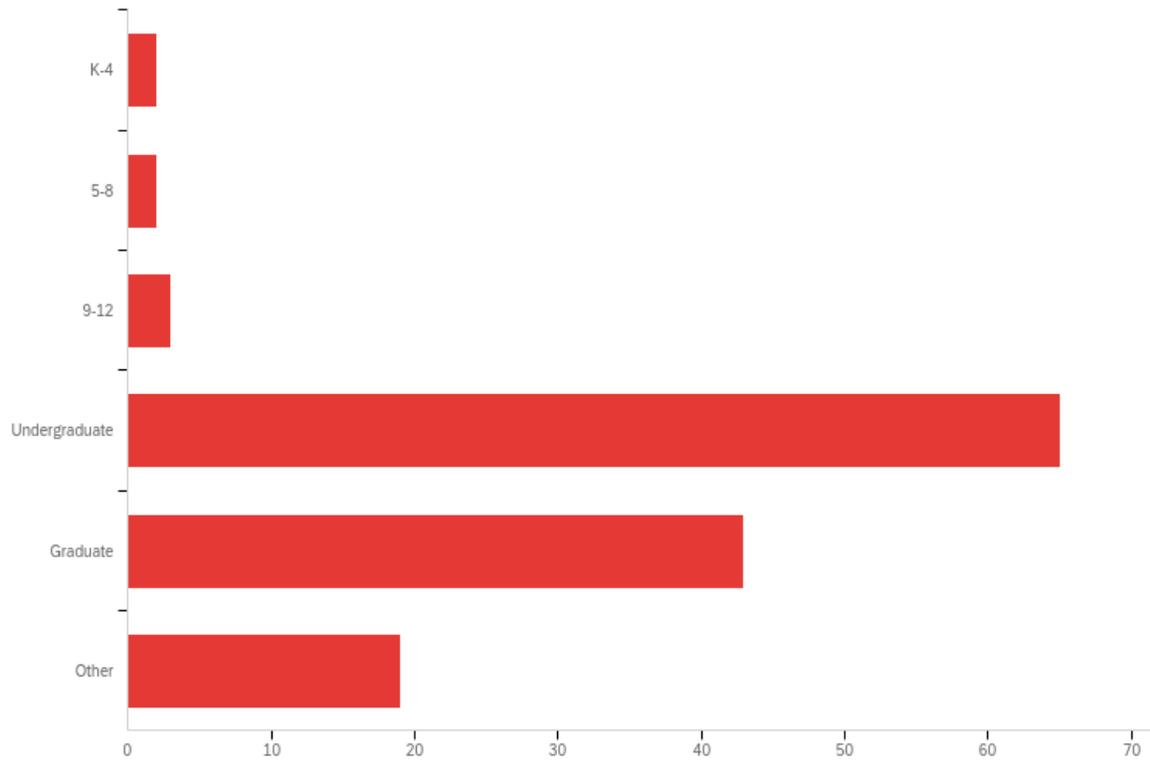
Question 11 received 97 responses.



Instruction with Congressional Archives Questions

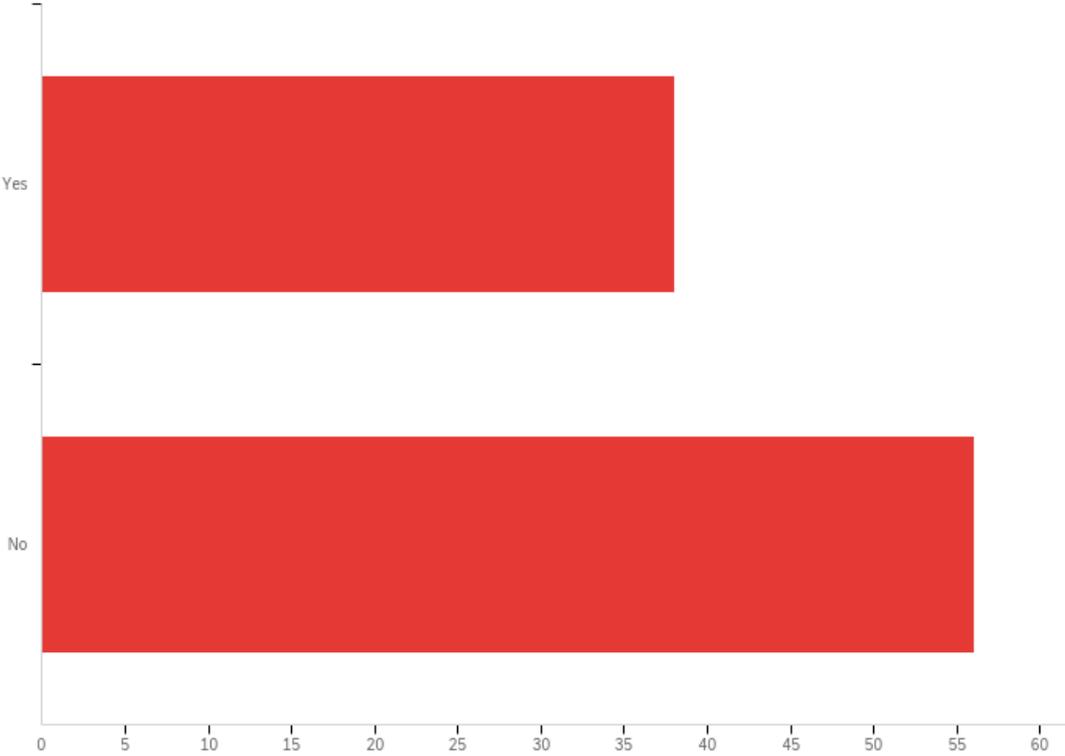
12. Which grade level do you instruct? Please choose all that apply.

Question 12 received 89 responses. “Other” responses included the general public, faculty, adults, and not applicable.



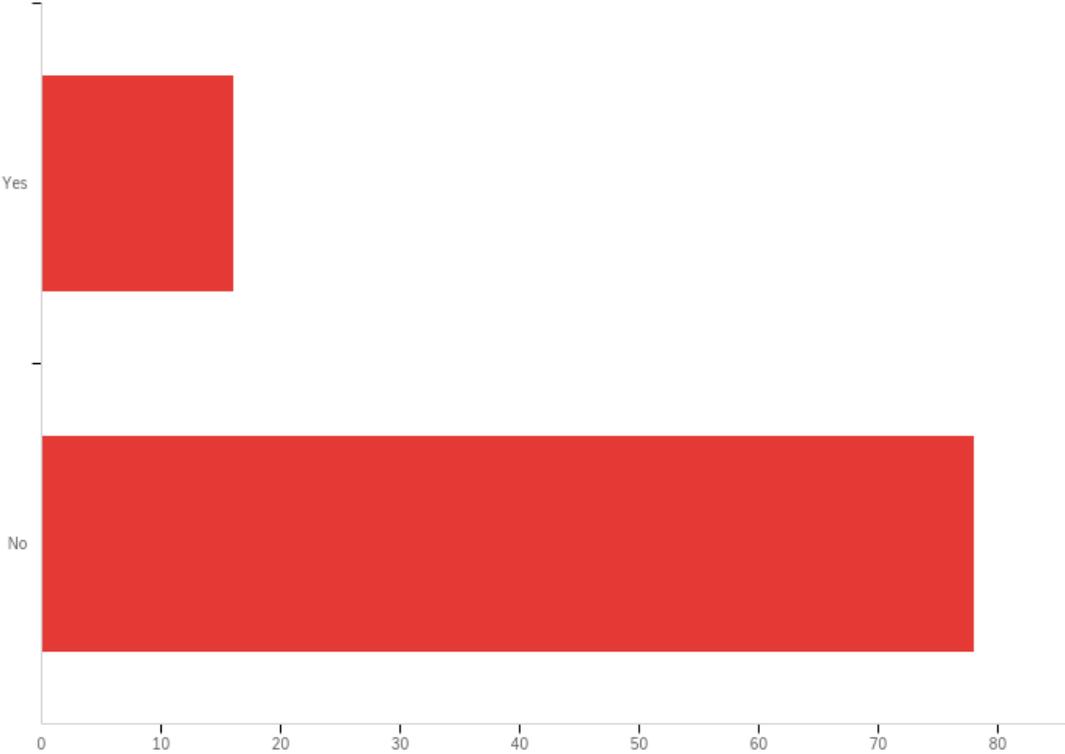
13. Have you used congressional archives in instruction?

Question 13 received 94 responses, with 40 percent answering yes and 60 percent no.



14. Have you used digital archives, such as DPLA Primary Source Sets, in instruction?

Question 14 received 94 responses, with 17 percent answering yes and 83 percent no.



15. What learning outcomes are important for your students as they engage with congressional archives?

Question 15 received 49 responses. Responses primarily related to some of the primary source literacy core ideas or subject knowledge acquisition. The core ideas of primary source literacy include analytical concepts (engaging primary sources through hypothesis, analysis, synthesis, interpretation, critical thinking, and evaluation); theoretical concepts (understanding of evidence, authority, power, authenticity, context, materiality, historical empathy, agency, value, absences, and privilege); and practical considerations (developing skills for finding, accessing, gathering, and handling primary sources in a variety of formats and locations).³ Subject knowledge learning outcomes related primarily to Congress and to policy/legislative processes, political processes, history of the institution and public issues, Congress and foreign policy, Congress and representation, agenda setting, and decision making. The full list of responses is below:

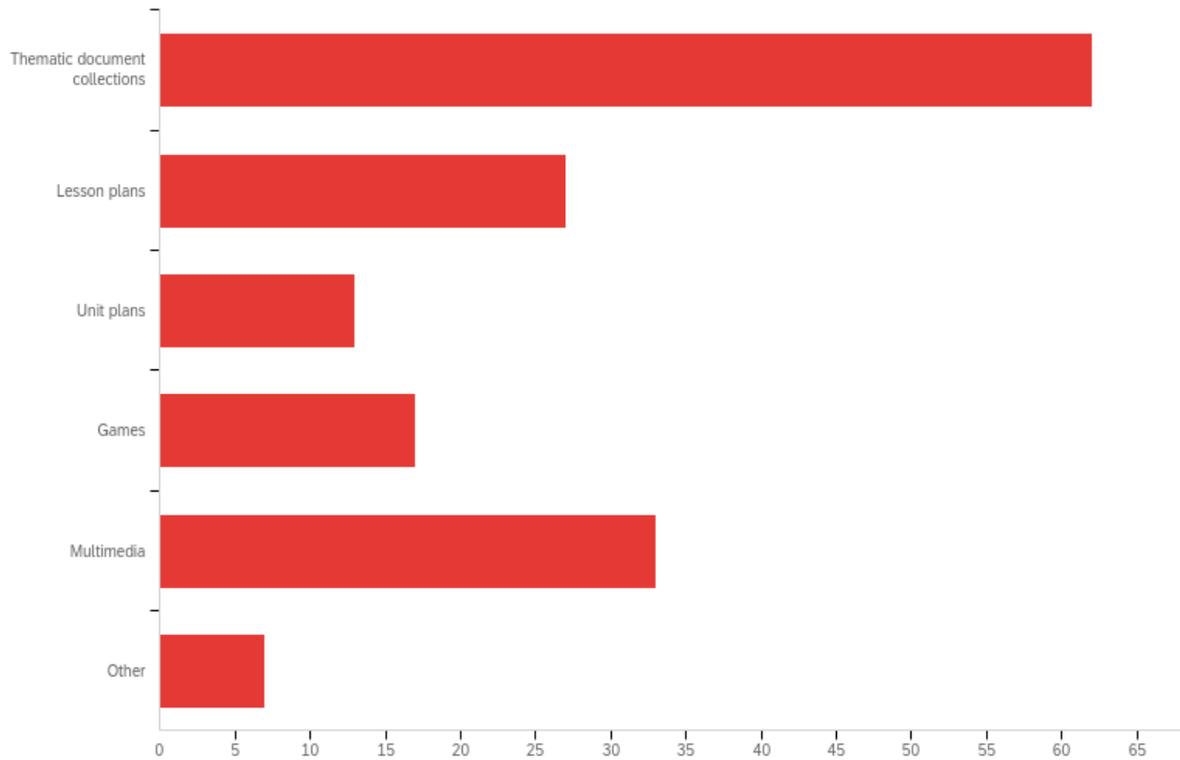
- When I taught, I would have wanted my students to question how the digital archives were put together.
- An understanding of the existence of both archives and Congress! And hopefully some idea about how Congress shapes so, so many aspects of our lives that we take for granted.
- Interpretation and use
- Critical thinking, curiosity
- Connecting archival materials to current issues, research, or interests. In addition, recognizing the legislative process that occurs in the archival collections of congressional representatives.
- I teach research methods, and one assignment is using primary source documents for analysis. In other courses, I may use documents as examples or to focus attention on issues for discussion or projects.
- Research skills, historical context
- How to use archives in research
- The ability to trace progression of debate and policy across time
- To understand the multifaceted nature of the political process and the role that process has for the state's history
- Fluency with using original source records for reference and data collection
- Understanding the policy process
- Learning how to navigate a digital archive; learning how to find material relevant to their research topic
- Understanding how to use primary sources
- How to find evidence and understand significance of evidence.

³ SAA-ACRL/RBMS Joint Task Force on the Development of Guidelines for Primary Source Literacy. "Guidelines for Primary Source Literacy." SAA and ACRL. 2018. <https://www2.archivists.org/sites/all/files/GuidelinesForPrimarySourceLiteracy-June2018.pdf>.

- Diverse research skills, basic archival familiarity, growth in historical knowledge
- Students are able to evaluate, articulate, and summarize a range of perspectives on public issues
- Process, deep thinking, analysis
- Understanding how to find and use archival sources as data
- Original historical research papers
- Expertise in locating and interpreting primary sources.
- How to use evidence to support claims
- Learning debates/both sides of issues
- To become better informed about congressional history and those who peopled it
- Opportunity to work first-hand with easily accessible primary source data
- How to search, how to think, differences between truth and falseness
- Critical analysis, data mining
- Understanding the process by which policy is made, decisions behind political history
- To understand the complexities of the legislating process
- To understand how Congress can shape US foreign policy
- Learned how to manage a project, learned how to conduct archival research
- Critical reading skills
- Subject areas knowledge, increased comfort and capacity using primary sources
- Using finding aids for archival research
- Policy analysis, knowledge of legislative process, legislative research
- Understanding the role of Congress in relation to their constituents' needs, desires, etc.
- Studying the context of historical events
- Critical thinking
- Drawing inferences from historical documents
- Learning to contextualize, analyze, and interpret primary historical documents, gaining an understanding of the policymaking process
- Seeing people like them being engaged in government
- Understanding the discourse and interaction in issue development, agenda setting, and decision making
- Getting into the weeds of how legislatures function without getting entirely lost in the voluminous documents
- Connect with primary sources
- Research in primary documents, understanding legislative process and political process

16. In addition to archival documents, which types of curated resources are valuable instructional and learning aids? Please choose all that apply.

Question 16 received 74 responses. “Other” responses included all are valuable, collection guides, and not applicable.



Appendix D
Usability Report

Report by Travis Williamson, User Interface Designer, West Virginia University Libraries

Introduction

The American Congress Digital Archives Portal is a project funded by the National Endowment for the Humanities, and it seeks to digitize congressional archives from institutions around the country and make them available on a single website.

A usability test is intended to determine the extent that an interface facilitates a user's ability to complete routine tasks. Typically the test is conducted with a group of potential users either in a usability lab, remotely (using e-meeting software and telephone connection), or on-site with portable equipment. Users are asked to complete a series of routine tasks. Sessions are reported and analyzed to identify potential areas of improvement for the website.

The American Congress Digital Archives Portal usability test was conducted on the American Congress Digital Archives Portal testing website (staging1.lib.wvu.edu/). Testing was conducted by Travis Williamson (Test Administrator) and Danielle Emerling (Project PI and Data Logger). Testing was conducted remotely via Zoom and user responses were logged in an Excel spreadsheet. These sessions captured each participant's task completion, comments, overall satisfaction, suggestions, and feedback.

Executive Summary

The Test Administrator and Project PI conducted online usability testing remotely via Zoom between October 29th and December 10th. The purpose of the test was to assess the usability of the web interface design, information flow, and information architecture.

Twenty sample users participated in either a user interview or focus group. Each session lasted approximately 30-45 minutes.

In general, participants found the American Congress Digital Archives Portal to be clean, well organized, and intuitive. With an overall satisfaction rating of 87%, the majority of users viewed the site favorably when compared to other online databases. All participants had prior experience with online database research.

The test identified some problems including:

- Confusing positioning of search bar and search filters
- Inconsistency in search results between alternative search paths
- Lack of featured content on homepage to contextualize the scope of the research portal
- Inability to search with quotes
- Lack of date and media type option in drop-down sorting filter
- Confusing naming conventions for search limiters

- Lack of advanced search option
- Inconvenient footer positioning

This document contains the participant feedback, task completion rates, satisfaction ratings, and recommendations for improvements. A copy of the scenarios and questionnaire are included in the Attachments section.

Methodology

Sessions

The Test Administrator and Project PI conducted online usability testing remotely via Zoom between October 29th and December 10th.

The Project PI recruited participants through a Research Priorities Survey that asked for volunteers. Volunteers consisted of graduate students and research professionals, who were encouraged to participate with a \$20 Amazon gift card. The Project PI sent emails to participants requesting their availability. Participants responded with an appropriate date and time and were then given a link to a Zoom meeting. Each session lasted approximately 30-45 minutes. During testing sessions, the Test Administrator explained testing procedures and the purpose of the study. Participants were given three research scenarios and were prompted to complete each task.

User testing consisted of both focus groups and one-on-one interviews. Thirteen of the 20 users participated in one-on-one interviews, whereas the remaining seven users joined one of the three focus groups conducted during testing.

After each task, the Test Administrator asked the participant to rate their user experience on a 5-point Likert Scale with measures ranging from Very Difficult (1) to Very Easy (5). Users were also given a set of post-scenario questions, including (see Attachments):

- Were there any pain points in completing this task?
- What feature did you find most valuable in completing this task?
- Are there any features that were not present in the portal that would have helped you in completing this task?
- Do you have anything else to add about your experience completing this task?

After the last task was completed, the Test Administrator asked the participant to rate their overall user experience on a 5-point Likert Scale with measures ranging from Very Difficult (1) to Very Easy (5). Participants were also given a set of post-testing questions, including (see Attachments):

- How would you describe your overall experience with the website?

- What do you think about this design?
- What features did you find most valuable and why?
- If you could change one thing in this website, what would it be and why?
- What do you expect to see in the website in the future?

See Attachments for the testing rubric, scenario, and questionnaire.

Participants

All participants have done congressional research or digital library research in the past and represent a variety of occupations and research interests.

Twenty participants were scheduled over the testing period. Nineteen of the 20 participants completed the test, in full. One participant partially completed the test due to scheduling conflicts.

Occupation/Field of Research

Participants were asked to identify their occupation/field of research. To get a holistic understanding of the portal’s diverse user base, participants included students and academic researchers with varying fields of research.

Demographics

Archivist	Grad Student [History]	Grad Student [Poli Sci]	Grad Student [Public Affairs]	Historian	Political Scientist
5	1	1	1	8	4

Evaluation Tasks/Scenarios

Participants attempted to complete the following test scenarios (see Attachments for complete test scenarios/tasks):

- Find a document about the Truman Committee.
- Find all files that are created by or are about Robert Byrd.
- Find all files related to international affairs policy.

Results

Task Completion Success Rate

Seventeen of the 20 (85%) participants successfully completed task one (find a document about the Truman Committee). Nineteen of the 20 (95%) completed task two (find all files that are created by or are about Robert Byrd). All participants (100%) successfully completed task three (find all files related to international affairs policy).

Task Completion Rates

Participant	Task 1	Task 2	Task 3
1	√	√	√
2	√	√	√
3	√	√	√
4	√	√	√
5	√	√	√
6	√	√	√
7	√	√	√
8	√	√	√
9	√	√	√
10	—	—	√
11	√	√	√
12	√	√	√
13	√	√	√
14	√	√	√
15	√	√	√
16	—	√	√
17	√	√	√
18	√	√	√
19	√	√	√
20	—	√	√
Success	17	19	20
Completion Rates	85%	95%	100%

Task Ratings

After each task, the administrator asked participant to rate their user experience on a 5-point Likert Scale with measures ranging from Very Difficult (1) to Very Easy (5).

For the first task, 71% of user responses indicated they found the task to be either easy or very easy, whereas 29% of respondents found the task to have some level of difficulty, ranging from moderate to severe. For the second task, 94% of user responses indicated they found the task to be either easy or very easy, whereas 6% of respondents found the task to be moderately difficult. For the third task, 100% of user responses indicated they found the task to be either easy or very easy.

After the last task was completed, the administrator asked the participant to rate their overall user experience on a 5-point Likert Scale with measures ranging from Very Difficult (1) to Very Easy(5).

Nineteen of the 20 (95%) participants indicated their overall user experience to be positive or very positive. One of the 20 participants (5%) said their overall experience was somewhat difficult.

The Average User Rating and Overall Satisfaction Score are a mean average of participant responses. With an Overall Satisfaction Score of 87%, most users found the portal to be user-friendly.

Task Ratings

Participant	Task 1	Task 2	Task 3	Overall Satisfaction
1	—	—	5	4
2	—	—	—	4
3	—	—	—	4
4	—	4	5	4
5	2	5	4	4
6	4	4	4	5
7	4	4	4	5
8	5	5	5	5
9	4	4	4	4
10	—	—	4	4

11	5	5	5	5
12	4	4	4	4
13	5	4	4	4
14	4	2	4	4
15	—	5	5	4
16	1	4	5	3
17	4	4	5	5
18	5	5	5	5
19	3	5	4	5
20	2	4	4	5
Average User Rating	3.71	4.25	4.44	4.35
Satisfaction Score	74%	85%	89%	87%

User Comments

Upon completion of the tasks, participants provided feedback for what they liked most and least about the website. Users also offered recommendations for improving the website.

Liked Most

The following comments capture what the participants liked most:

- *“The (filter) tabs are really nice - lots of ways to limit the search.”*
- *“Beautiful site and easy to use.”*
- *“Navigability and searching - you nailed it. It's user-friendly.”*
- *“The layout of the cards - each individual item - I can see 3 across my screen. That's all laid out well.”*
- *“You can save the searches. That's really useful.”*
- *“Like being able to open the PDF in a browser window.”*

Liked Least

The following comments capture what the participants liked least:

- *“Advanced search is not straightforward on the site.”*

- *“International Affairs is vague. I'm not sure what you're going for in these. A lot of things could be considered international affairs. It seems like there should be more subsets of that, opposed to a catch-all term.”*
- *“The bar at the bottom that never goes away, that I might like to see go away so I could see more of the research.”*
- *“Search in quotes, but got no entries.”*
- *“Search bar on right and limiters on left is confusing.”*
- *“Browse in the middle of the page wasn't really useful to me.”*
- *“Filters still there after first search.”*
- *“Searching for Byrd and sorting by relevance...and I'm seeing 50 items - cleared search and went to Byrd congressional papers - 39 items.”*

User Recommended Changes

The following comments capture what the participants think will be valuable changes to the website:

- *“Would be nice to have something eye-catching and dynamic on the landing page. There's some white space below browse (button), and my brain wants something to go in that space.”*
- *“(I'm) mostly a quantitative researcher, so one of the broader questions I have is whether and when you might consider having an API for researchers.”*
- *“Sorting - it says I can't sort by date, but if I was interested in several Congresses, it would be nice to sort that by date.”*
- *“For individual items, it would be helpful to add a citation.”*
- *“May have been nice to have some subject guides - by era at least - so if there's a WWII subject guide or first half 20th century, then I could try to look in there before typing in the search engine.”*
- *“Locations of congressional papers, links out to archival collections. Maybe adding some sort of feature where you can show lists of Members and where to find their repositories.”*

Recommendations

The recommendations section provides recommended changes and justifications driven by the participant success rate, satisfaction score, and comments. Each recommendation includes a severity rating. The severity rating indicates the degree to which an issue will negatively impact the overall site usability if not resolved. The following recommendations will improve the overall ease of use and address the areas where participants experienced problems or found the interface/information architecture unclear.

Recommendation	Justification	Severity
<p>Move search bar to the left side of page above search limiters.</p>	<p>Participants indicated a lack of cohesion between the search bar and limiters.</p> <p>Multiple users did not realize that the limiters and search bar could be used together to refine their search results.</p> <p>Repositioning the search bar would increase overall site usability.</p>	<p>Moderate</p>
<p>Change the footer from sticky to fixed positioning.</p>	<p>Participants stated the sticky footer occupied too much space, which could be better used for search results.</p> <p>Changing the footer to a fixed positioning at the bottom of the page would provide more space for populated results.</p>	<p>Moderate</p>
<p>Add date and media type option to the drop-down sorting tool.</p>	<p>Participants noted that adding a date and media type option to the drop-down sorting tool would provide added utility.</p> <p>Users can currently limit search results for a specified period (i.e., approximately 1941-1946). However, this feature does not allow users to organize search results chronologically.</p>	<p>Moderate</p>

<p>Review inconsistencies in search results between alternative search paths.</p>	<p>Some participants indicated a lack of confidence in their search results due to inconsistencies between alternative search paths.</p> <p>One user notes: <i>“Searching for Byrd and sorting by relevance...and I'm seeing 50 items - cleared search and went to Byrd congressional papers - 39 items.”</i></p> <p>The project team should review search limiter and search bar consistency.</p>	<p>Moderate</p>
<p>Add an advanced search feature.</p>	<p>Several participants felt that a more comprehensive advanced search feature would provide added utility.</p>	<p>Minor</p>
<p>Add functionality to search with quotes.</p>	<p>Some participants attempted searching using quotations, which yielded zero results.</p> <p>Search phrases placed in quotations are commonly used in database research. Adding the ability to search with quotations would match prior user experience with database research.</p>	<p>Minor</p>
<p>Add citation tool to individual items.</p>	<p>Participants noted that a citation tool would be a valuable addition to the website, especially for students.</p> <p>The project team should examine options for a built-in citation tool or an external link to a citation generator.</p>	<p>Minor</p>

<p>Replace browse collection button on homepage with a featured content section.</p> <p>Add featured subject guides.</p>	<p>Participants noted that a featured content section would be a valuable addition to the website.</p> <p>Highlighting featured content and subject guides will give users a better understanding of the scope of the collection.</p> <p>Participants also felt that the browse collection button was an unnecessary feature, and this space would be better served with featured content.</p>	<p>Minor</p>
<p>Externally link archival collections and partnered institutions.</p>	<p>Participants requested the site provide external links to archival collections and partnered institutions.</p>	<p>Minor</p>
<p>API integrations for improved quantitative research.</p>	<p>Participants noted that API integrations would provide added value to the site.</p> <p>The project team should discuss the possibility of API integrations.</p>	<p>Minor</p>
<p>Review the stacking functionality of search limiters.</p> <p>Review if limiters should refresh after each search instance.</p>	<p>Several participants commented on the functionality of search limiters. Some users found the ability to stack search limiters to be useful, whereas others found this feature to be cumbersome.</p> <p>Some participants suggested that search limiters should refresh for new search instances.</p> <p>The project team should review the limiter</p>	<p>Minor</p>

	<p>functionality for improvement opportunities.</p>	
<p>Review the amount of metadata to be included with search results.</p>	<p>Some participants felt there was too much metadata information for each search result. Users noted the amount of item metadata decreased scanability.</p> <p>Other participants felt the amount of metadata provided with items was adequate. Some users stated adding the archival box number to each item would be a valuable addition.</p> <p>The project team should review the amount metadata to be provided with each listing.</p>	<p>Minor</p>
<p>Review limiter naming conventions.</p>	<p>Several users were confused by the naming conventions of search limiters (i.e. international affairs, coverage spatial).</p> <p>The project team should review limiter naming conventions for improvement opportunities.</p>	<p>Minor</p>

Conclusion

Most of the participants found the American Congress Digital Archives Portal to be clean, well organized, and intuitive. Overall, users found the search limiters and search bar to be the most valuable features. With an overall satisfaction rating of 87%, the majority of users view the site favorably when compared to other online databases. Implementing the recommendations and continuing to work with users will ensure a continued user-friendly website.

Attachments

American Congress Digital Archives Portal Project Usability Testing Testing Rubric, Scenario, and Questionnaire

Welcome. My name is Travis Williamson, and I am a User Interface Designer at West Virginia University Libraries. We are also joined by Danielle Emerling, Project PI and Congressional Papers Archivist at WVU Libraries, who will be taking notes.

Thank you for participating in usability testing for the American Congress Digital Archives Portal project. This project is funded by the National Endowment for the Humanities, and it seeks to digitize congressional archives from institutions around the country and make them available on a single website.

Your participation in this project will be kept as confidential as legally possible. All data will be reported in the aggregate. Your participation is entirely voluntary. You may skip any question that you do not wish to answer, and you may stop participating at any time. The West Virginia University Institutional Review Board's acknowledgment of this project is on file with the WVU Office of Human Research Protections.

The information we will gather from your participation today will be used to improve the overall user experience and give us a better understanding of what users find valuable about the research portal. This exercise will take approximately 30-45 minutes to complete.

During this interview, you will complete 3 research scenarios using the portal. As you complete these tasks, I will ask specific questions about your experience. There are no right or wrong answers. Let's begin.

Tasks

In the chat, please copy the URL to the American Congress Digital Archives website. In your preferred browser, please paste the URL to open the website. (Confirm that everyone has opened the website successfully).

1. For the first task, find a document about the Truman Committee. Please talk out loud about the actions you are taking.
2. For the second task, find all files that are created by or are about Robert Byrd. Please talk out loud about the actions you are taking.

3. For the third task, find all files related to international affairs policy. Please talk out loud about the actions you are taking.

Post-Task Questionnaire

Task 1. How difficult was it to locate materials about the Truman Committee (subject/topic)?

- Were there any pain points in completing this task?
- What feature did you find most valuable in completing this task?
- Are there any features that were not present in the portal that would have helped you in completing this task?
- Do you have anything else to add about your experience completing this task?

Task 2. How difficult was it to locate materials by or about Robert Byrd (name/creator)?

- Were there any pain points in completing this task?
- What feature did you find most valuable in completing this task?
- Are there any features that were not present in the portal that would have helped you in completing this task?
- Do you have anything else to add about your experience completing this task?

Task 3. How difficult was it to locate materials about international affairs policy?
(subject/policy)?

- Were there any pain points in completing this task?
- What feature did you find most valuable in completing this task?
- Are there any features that were not present in the portal that would have helped you in completing this task?
- Do you have anything else to add about your experience completing this task?

Post-Testing Questionnaire

1. How difficult were the test assignments? 1-very easy, 5-difficult

2. How would you describe your overall experience with the website?

- How does this compare to digital archives you have used in the past?
- How could this experience have been improved?

3. What do you think about this design?

- What do you think about how information and features are laid out?
- Are there any changes you would recommend to the overall design to improve the usability of this digital archive?

4. What features did you find most valuable and why?
 - Were there any specific design features that improved your ability to complete these tasks?
 - Where there any specific design features that inhibited your ability to complete these tasks?
5. If you could change one thing in this website, what would it be and why?
6. What do you expect to see in the website in the future?
 - Why will you continue to use this website? What will stop you from using this website in the future?

Appendix E

Project Participants and Advisory Board

Project Team

- Jody Brumage, Robert C. Byrd Center for Congressional History and Education
- Danielle Emerling (PI), West Virginia University
- Sarah Gard, Robert J. Dole Institute of Politics, The University of Kansas
- Steven Giessler, West Virginia University
- Tracy McCormick, West Virginia University
- Travis Williamson, West Virginia University

Advisory Board

- Jodi Allison-Bunnell, Montana State University
- Audrey Coleman, Robert J. Dole Institute of Politics, The University of Kansas
- Sean Kelly, University of California Channel Islands
- Frank Mackaman, The Dirksen Congressional Center
- Sheryl Vogt, Richard B. Russell Library for Political Research and Studies
- Alison White, U.S. Senate Historical Office
- Jay Wyatt, Center for Legislative Archives, National Archives and Records Administration

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- Paula Martinelli, West Virginia University
- Hannah McCoy, West Virginia University
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