Agenda

- Welcome and details for today
- Research question, goal, objectives, and methodology
- Working groups - getting started
  - breakout groups for introductions, discussion
  - back to main room, full group
- Next steps:
  - first in-person meeting: Rome, September 1-3
  - draft agenda
  - first deliverable to SSHRC: Milestones Report
- Questions, final thoughts

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Research question

Can we use **Artificial Intelligence** for carrying out **competently and efficiently** all **records and archives functions** while **maintaining the nature and trustworthiness of public records**?

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The ITrust AI goal

To **design, develop, and leverage A**rtificial **I**ntelligence to **support the ongoing availability and accessibility of trustworthy public records** by **forming a sustainable, ongoing Partnership producing original research, training students and other highly qualified personnel** (HQP), and generating a virtuous circle between academia, archival institutions, government records professionals, and industry, a feedback loop reinforcing the knowledge and capabilities of each party.

Objectives

1. **Identify specific AI technologies** that can address critical records and archives challenges;
2. **Determine the benefits and risks** of using AI technologies on records and archives;
3. **Ensure that archival concepts and principles inform the development of responsible AI**; and
4. **Validate outcomes** from Objective 3 through case studies and demonstrations.

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Two-pronged Approach

- **Short term approach**:
  - <u>identifying high impact problems and limitations</u> in records and archives functions
  - <u>applying AI to address these problems and limitations</u>
  - <u>establishing a collaboration</u> between records and archival academics and professionals and AI researchers and industry experts

- **Long-term approach**:
  - **identifying and/or developing AI tools that records and archives specialists will need in the future** and will allow for
    - **flexibility** in the face of rapid change
    - **decision support**
    - **rapid implementation** of AI-based solutions

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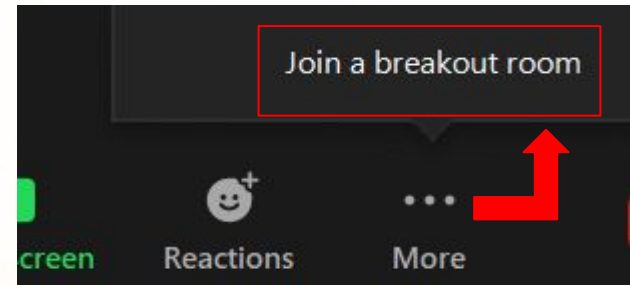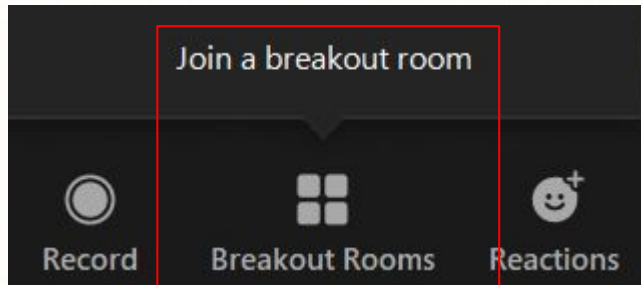Trust AI

Soft systems approach

The research prioritizes

- a **holistic understanding** of the potential impacts of AI on critical records and archival challenges
- the **identification of principles** to be applied at different levels of scale and across different types of phenomena
- the collection and organization of knowledge to **increase efficiency**
- working **not only inside boundaries specified by our disciplines**, but also **across them** and with elements in the environment **outside them**
- **bringing in and reconciling inconsistencies among concepts from different fields**
- **building upon the knowledge gained** in each phase of the project

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Break-out rooms

- Creation and Use - Room 1

- Appraisal and Acquisition - Room 2

- Arrangement and Description - Room 3

- Retention and Preservation - Room 4

- Management and Administration - Room 5

- Reference and Access - Room 6

First steps to achieve our objectives

Within each Working Group:

- **Discover what exists** in the field (e.g. in your organization)
- **Review and critique**:
  - off-the-shelf tools
    - who is using them?
    - to what effect?
    - what issues arise?
- **Create literature reviews and annotated bibliographies** to guide future work
- **Identify the issues to be solved and propose studies**

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Practical next steps

- Test your <u>website login</u> when it is sent to you
- <u>Meet with your Working Group</u> as soon as possible (at least a couple of times before the September meeting)
  - figure out <u>how you intend to work</u> (full group, sub-groups, etc.)
  - <u>propose studies</u> (5-8 per WG) or areas of interest (fill out study templates if possible) - be sure to include practical AI in the form of tool development
  - let management know whether <u>you need graduate research assistants in addition</u> to the 1-2 UBC students assigned to each WG (note that UBC students will be assigned to task across WGs, such as Terminology and Annotated Bibliographies.

Come to Rome, physically or (if not possible) virtually, ready to discuss the studies!

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First in-person meeting*

Location:

- Biblioteca Nazionale, Rome, Italy, September 1-3, 2021

Agenda:

- **AI** workshop (half day)
- **Presentation** of Working Groups' studies proposals
- **Discussion** and approvals of studies
- **First draft of the Milestones Report** required by SSHRC (to be finalized and approved at the December meeting in Paris and submitted to SSHRC by January 17, 2022)

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*dependent on Covid and travel restrictions

Milestones Report

- **List of activities and products which are expected to be completed by the midterm point** (October 2023)
- **Responses to comments and suggestions** of the Expert Panel / Adjudication Committee made during the formal application stage
- **Indication of the challenges** we expect to encounter and of how will we address them
- **Explanation of any significant adjustments** to the project plans and activities described in the application
- **Description of plans, progress indicators and mechanisms will we use to monitor and measure success** (e.g. deliverables, outcomes, outputs...)?

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Financial Reporting of Partner Contributions

- Financial reporting covers the period **April 1-March 31 for each year of the project** (Year 1 is April 1, 2021 - March 31, 2022)

- **Each partner must submit a statement** to the Project Coordinator about their <u>in-kind and/or cash contributions</u> to the project by April 10 (first statement due April 10, 2022 - a template is posted on the website).

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Examples of Contributions

- Estimate **value of time** spent by researchers on research and in meetings
- Give the **cost to you of Graduate Research Assistants in your organization** that you have paid to work on the project (if relevant - but do not report time of GRAs provided by UBC)
- Give the amount your organization has allowed you for **travel to meetings** (if relevant)
- Give the amount your organization has contributed in **direct or indirect support of hosting meetings and/or symposia** (if relevant)

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FAQ

- **How do working groups meet?**
  - use video conferencing like Google meet, Zoom (free accounts allow meetings of >= 3 people for 40 minutes; many people have accounts through their work), Microsoft Teams - ITrust AI cannot provide video conf at this time.
  - WGs can also meet in person if a partner wishes to host such a meeting.
- **How do working groups present study proposals?**
  - there is a fillable form that will be downloadable from the website, Restricted > Documents

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Questions & discussion

Thank you!

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