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Deliverable 5.1

User Needs Analysis

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Abstract (for dissemination)	This deliverable summarizes our findings regarding the make-up of EHRI's intended user community in terms of its composition (disciplinary backgrounds, location, career status) and its size as well as their needs and requirements for services and training. The deliverable is based on an analysis of data available on users of existing EHRI services as well as two surveys conducted: "User Needs and Innovation Strategy" distributed among EHRI partner institutions, and EHRI User Access and Training Strategies survey distributed widely among current and potential users of EHRI services.
Management Summary	This work package is responsible for defining EHRI's integrated service provisions and for developing the modalities and procedures for user access to these services. To achieve this, the first task was to map and define EHRI's intended users and assess their current and future needs for EHRI services and training. The work of this task has resulted in this deliverable, D5.1. This deliverable provides an overview of the past activities provided by EHRI, with a particular emphasis on the user profiles of participants of EHRI services which have helped us in defining our user community both in terms of its composition and its size. In addition, this deliverable summarizes the finding of two surveys conducted, which have helped in first identifying additional potential user

	groups for EHRI services and in assessing the needs and requirements of EHRI users.
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1. Introduction

Since its establishment EHRI has promoted transnational research on the Holocaust by overcoming dispersal and fragmentation of Holocaust archives as well as expertise across the globe. During previous integrated activities, EHRI has developed a broad range of services which have been and continue to be delivered to a large and growing body of users. The services provided can be categorized in two types. First, services provided through physical access include training programs such as Workshops, Seminars, Conferences. A transnational access program offers fellowships to researchers at EHRI's partner institutions. Secondly, a growing number of online services have been developed, which include the EHRI Portal, the EHRI Document Blog, the EHRI Online Editions, and the EHRI Self-Guided Online Courses as well as Guided Online Courses. The main user groups for the past integrated activities have included researchers, archivists, collection holders, and digital humanities specialists. Within EHRI's Preparatory Phase, WP5 is responsible for defining EHRI's integrated service provisions and for developing the modalities and procedures for user access to these services. To achieve this WP5 is tasked first with defining EHRI's user community both in terms of its size and composition (disciplinary background, location, career status). The second objective of this task is to obtain an up to date understanding of the potential needs of EHRI users, and to assess whether the existing services fulfil those needs. This deliverable will summarize the findings relating to the makeup of EHRI's user community, as well as the needs and requirements for services and training.

2. Defining EHRI'S User Community

The work towards identifying the intended user community for a permanent EHRI Research Infrastructure was done first by examining the profiles of EHRI users over the past years. Since 2010, EHRI has provided a broad range of services to a growing audience. The following analysis will summarize the main user groups of the different services offered during EHRI's second phase (2015-2019). The focus will be on information relating to the participants of the various physical EHRI services (Fellowships, Seminars, Conferences and Workshops) on the one hand, and users of EHRI online services (Portal, Online Editions, Document Blog, Online Courses) on the other.

2.1 Physical Access

EHRI grants researchers and archivists physical trans-national access to the most important collection-holding institutions and centres of excellence in the domain. The physical access is implemented as a trans-national Fellowship Programme which allows researchers and collection specialists to access the geographically dispersed resources as well as expertise they need. A comprehensive training programme – implemented both through physical seminars and online learning – supplements EHRI's access programme. EHRI training fills gaps in existing (national) training provisions and equips early career researchers and archivists with the necessary skills to excel in the digital world, and to take full advantage of the trans-national integration of sources.

The evaluation reports on EHRI Fellowship, Seminars, Conferences and Workshops, provide pertinent information of participant profiles for these EHRI services which will be summarized below.

2.1.1 Fellowships

This data refers to the fellows who took part in an EHRI fellowship during EHRI's second phase (2015-2019). A total of 143 fellows took part in the programme. The geographical profile of the fellows is as follows: The majority of fellows came from Western Europe (36%). The second largest group (24%) from Eastern Europe. 17% were from North America, it was noted however that the majority of North American fellows were Eastern and Southern European natives.¹

Background of participants: The majority of participants were established researchers (39%) and PhD candidates (38%). Amounting together to 77% of fellowship participants. 15% of participants were professionals in reference services including librarians, archivists, data specialists, curators, memorial site staff. The remaining 8% of participants were either independent researchers, M.A. or B.A. students.

2.1.2 Methodological seminars

A total of 148 participants took part in at least one of 10 methodological seminars from 2017-2019. The geographical distribution of participants included 35 countries. The majority of participants were from Eastern Europe, 48%. While 25% of participants came from North America, it was noted that many North American participants were of Eastern European origin and were researching topics dealing with Eastern Europe. Western Europe also saw participation of 25% of participants, followed by Israel (23%), Southern Europe (15%), Northern Europe (10%).

Background of the participants: A third of total participants were working on their PhD, another third had already finished their PhD and were affiliated with universities of research institutes as senior researchers, lecturers, professors, department heads. Another third, consisted of employees of reference services in various institutions, including archivists, librarians, data specialists, curators, or genealogists. Other participants, totalling 9, were either M.A. students or independent researchers.²

2.1.3 Workshops

In 2016-2018, EHRI organized seven international interdisciplinary workshops. The multidisciplinary aspect of these workshops allowed for the inclusion of participants from varied and specific disciplines. Participants included researchers, conservators, digital humanities experts, curators, archivists, filmmakers and representatives from relevant initiatives and projects. The workshops gathered professionals from over 20 countries including USA, Israel, Poland, Czech Republic, Spain, Germany, UK, Italy, Switzerland, Russia, Serbia, Romania, Belgium, France, Netherlands, Bulgaria, Hungary, Lithuania, Poland, Greece, Austria, Finland.³

2.1.4 Conferences

EHRI organized several conferences from 2016-2019, among them six regional conferences. The purpose of these regional conferences was to involve and attract individuals and institutions who previously had no relationship with EHRI in order to expose them to EHRI tools, services, activities and concerning archives to promote integration with the EHRI infrastructure. The conferences/workshops took place in partner institutions in Italy, France, Romania, Austria, Poland and Israel and gathered scholars working on similar topics. These conferences were also an opportunity to promote EHRI services to a potential body of users from a variety of backgrounds and geographical locations.⁴ Some of these conferences took

¹ D5.2 Final Evaluation Report, September 2019.

² D4.1 Evaluation Report – Methodological Seminars, April 2019.

³ D6.1 Seven workshops with related Humanities RIs and Sciences/Computer Sciences, August 2019.

⁴ D3.2 Report on Activities of Regional Networks, October 2019.

the format of a workshop and included the invited speakers, while others opened the invitation to an external community of experts. A total of 220 people took part in these regional conferences.

A final conference which took place in EHRI-2 Holocaust Studies in its Social Setting. Challenges and Trends- attracted 171 participants.⁵

2.2 EHRI Online Access

The second set of services provided are online services which include the EHRI Portal, the Document Blog, the Online Editions as well as EHRI Online Courses, both guided and self-guided. Qualitative information on user profiles for these services can be retrieved for the Guided Online Courses as well as for the Portal. The other services do not require registration and therefore offer only quantitative data on users.

2.2.1 Guided Online Course

Details on the EHRI guided Online Courses can be found in D4.2.2 and D4.2.3 Implementation of 3 Online Course learning groups. These courses took place in between 2017-2019. The guided Online Course was aimed at graduate level scholars of a wide array of fields. A total of 75 participants took part in the online course in 6 different learning groups.

In the first call the applications received were from 8 different countries (Australia, UK, Bangladesh, Hungary, Italy, Romania, Slovakia, and the USA) and represented a wide educational and disciplinary spectrum including M.A. students, those holding a B.A. degree, PhD candidates, and postdocs, professors, as well as teachers, librarians, and archivists. In the second call an even wider geographical dispersion was noted, with participants from Argentina, Brazil, Croatia, Georgia, Germany, Greece, India, Israel, Italy, Netherlands, Spain, Turkey, the UK, and the USA.⁶

2.2.2 Portal

While registration is not mandatory for use of the EHRI Portal, users who do register are able to access some additional features, and can choose to provide profile information to help connect them to others with similar backgrounds or research interests. There is a total of 1,871⁷ registered users on the Portal who have volunteered such information and this can, in aggregate, help characterise the Portal's user community, though it is important to note that all profile fields are optional and were therefore not all filled out by all users. In some cases, only the name of the user is indicated. The fields used for this analysis were the geographical location of the registered users, their professional role, and languages spoken.

⁵ D2.5 International Conference, 2019. <https://www.ehri-project.eu/sites/default/files/downloads/Deliverables/D2.5%20International%20Conference.pdf>

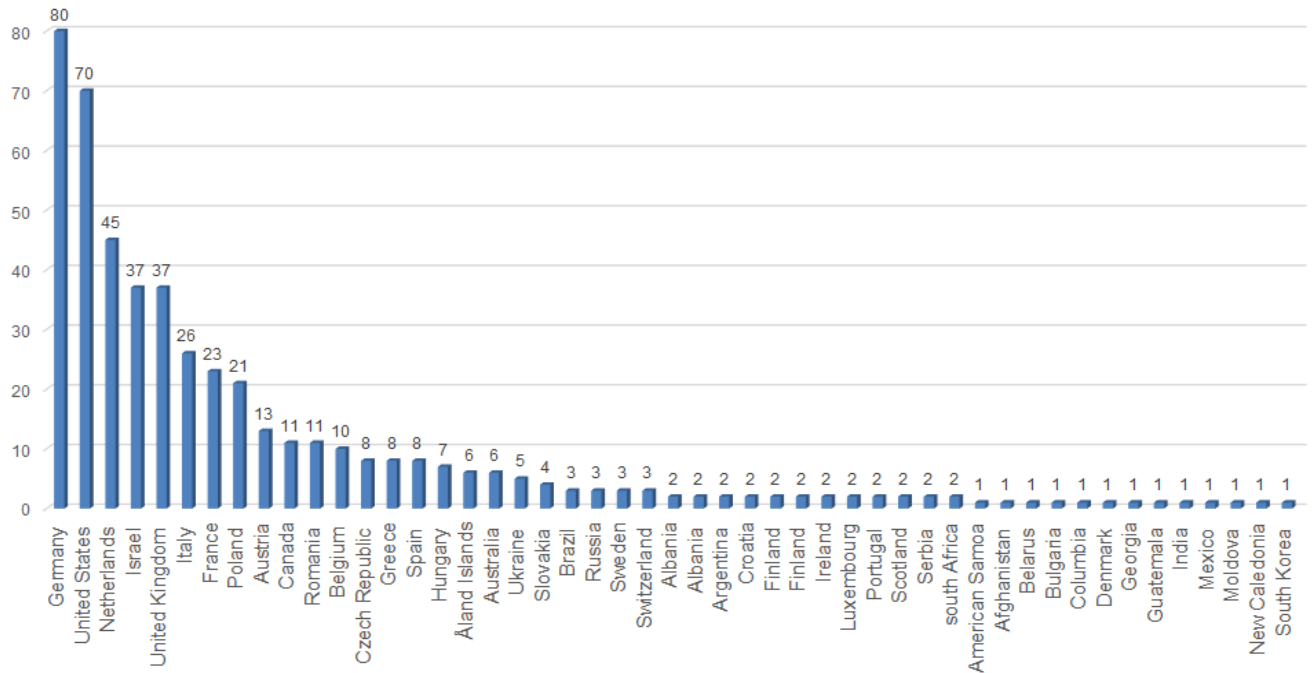
⁶ D4.2.2 Implementation of 3 online course learning groups, October 2017. <https://www.ehri-project.eu/sites/default/files/downloads/D4%202%20Implementation%20of%20online%20courses.pdf>

D4.2.3 Implementation of 3 online course learning groups, 2019.

⁷ At the time of the analysis of this data the total number of registered users was 1,871. This number has since increased.

Geographical location: 485 registered users indicated their geographical location.

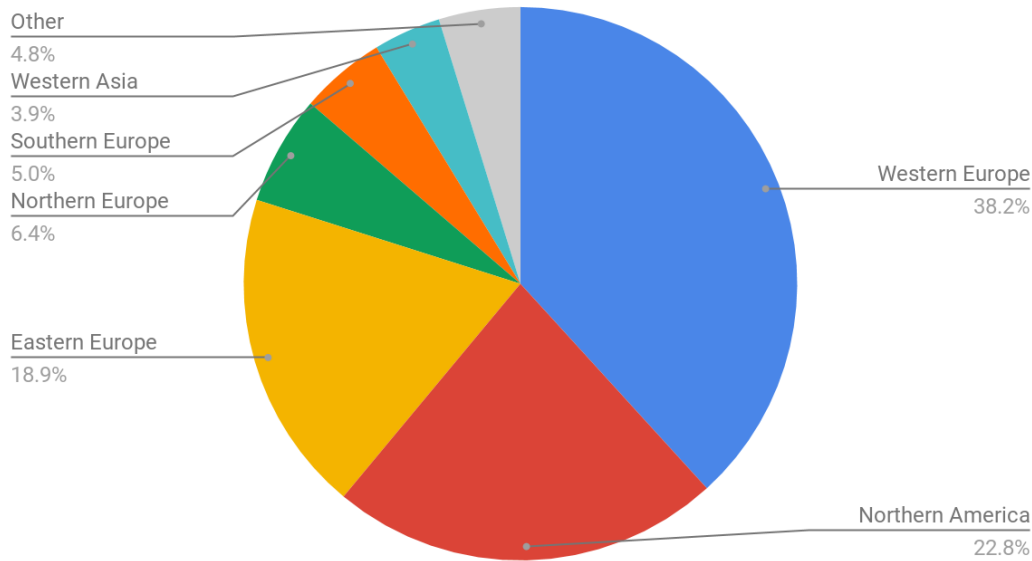
Registered Users EHRI Portal Per Country



As the above chart shows, 45% of registered users are located in Western Europe with Germany at the highest, followed by the Netherlands, and the UK. North America (Canada, United States) count for 17% of the total registered users. 11% are located in Southern Europe, 8% in Israel, another 8% in Eastern Europe, 5% in Central Europe, and 2% of registered users are situated in Northern Europe. The remaining 5% is distributed among countries in Asia, Africa and Australia.

The quantitative data retrieved from google analytics for use of the EHRI Portal points to a similar trend. As the following chart shows the highest use for the EHRI Portal from 2016-2020, is Western Europe followed by North America.

EHRI Portal: User Distribution

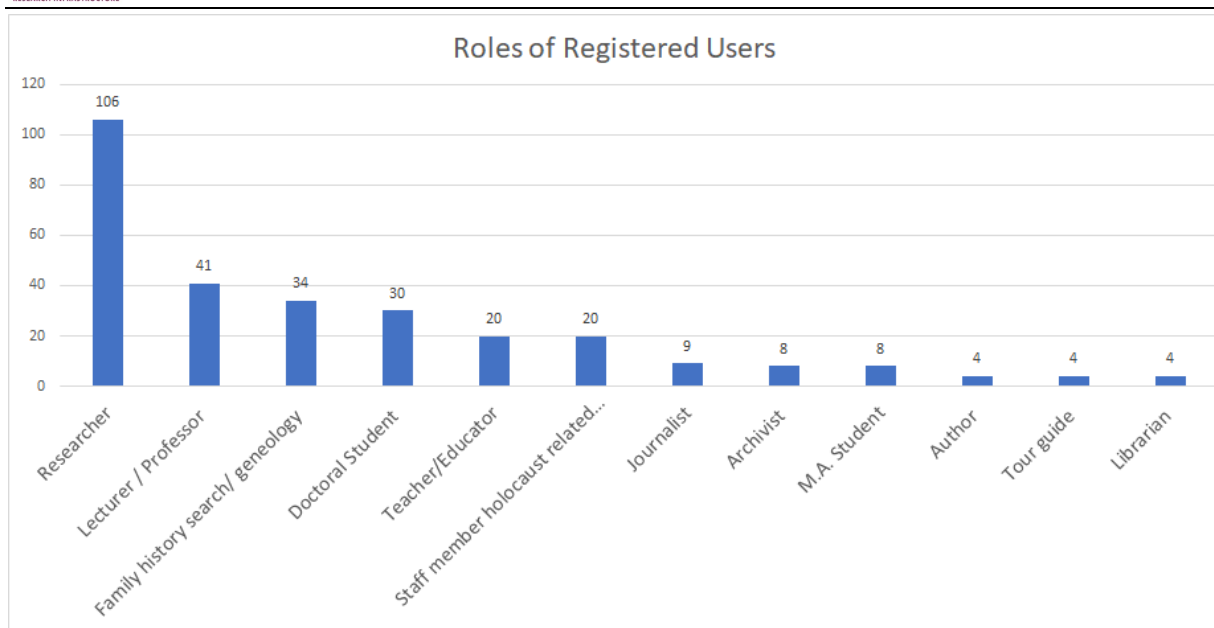


The roles of registered users

288 registered users indicated their role/positions in the registration process for use of the Online Portal. For the purpose of analysis, we have grouped the main responses into the following categories:

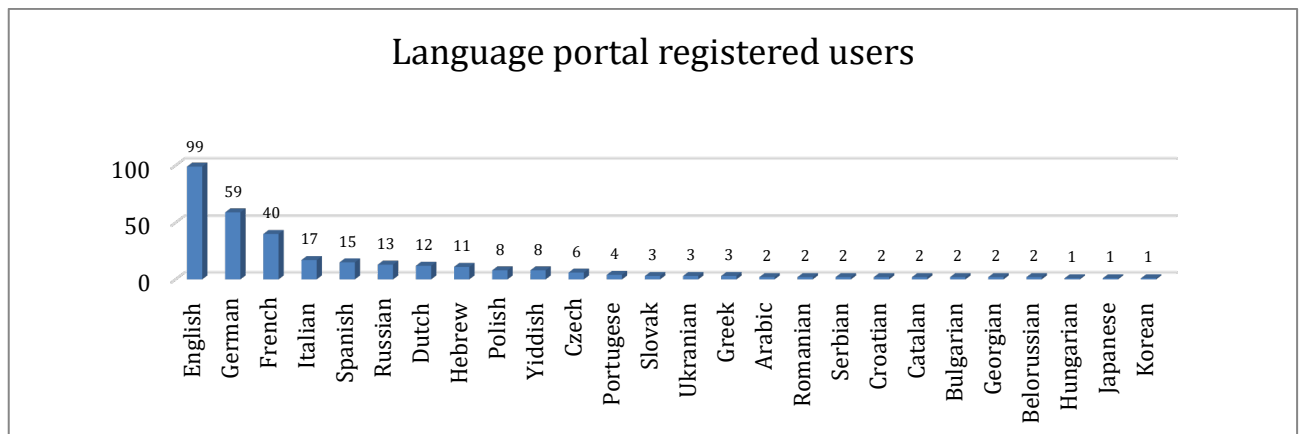
- Researcher
- Lecturer/Professor
- Genealogist/interest in family research
- PhD Students; M.A. student
- Teacher/Educator; Journalist
- Archivist
- Librarian
- Author
- Tour Guide

The chart below shows the distribution of designated roles per registered user. Among the registered users those in the academic field account for 64% of all registered users (graduate and doctoral students, lecturers/professors). 12% of registered users either defined themselves as genealogists or defined their research as family research. 7% defined their roles as educators or teachers, and another 7% as staff members of a Holocaust related institution. 3% of registered users defined themselves as archivists. This seemingly low number of archivists can be related to the fact that many staff of Holocaust related institutions did not declare themselves as archivists specifically but rather pointed to their affiliation to an archive. Finally, 1% of registered users indicated their roles as tour guides and librarians.



Language:

Another source of information that can be extracted from registered users of the Portal is that of languages spoken. The following chart shows a distribution of languages used by Portal registered users. The languages used are representative of the geographical trends of the Portal use as indicated above.

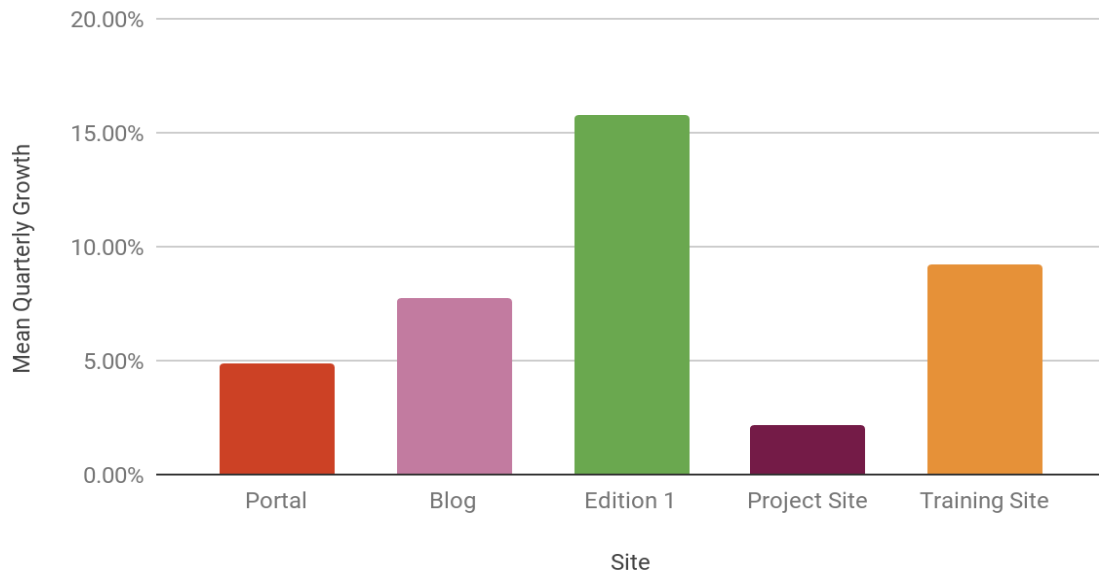


2.2.3 Document Blog, Online Editions, Self-Guided Course, Website

The information retrieved from Google Analytics on use of the Portal, the Documents Blog, the first Online Edition⁸, Self-Guided Course, and the Project site show that the number of users for all services has grown over the period Q1 2017 to Q4 2020, as measured by the average increase in traffic per quarter:

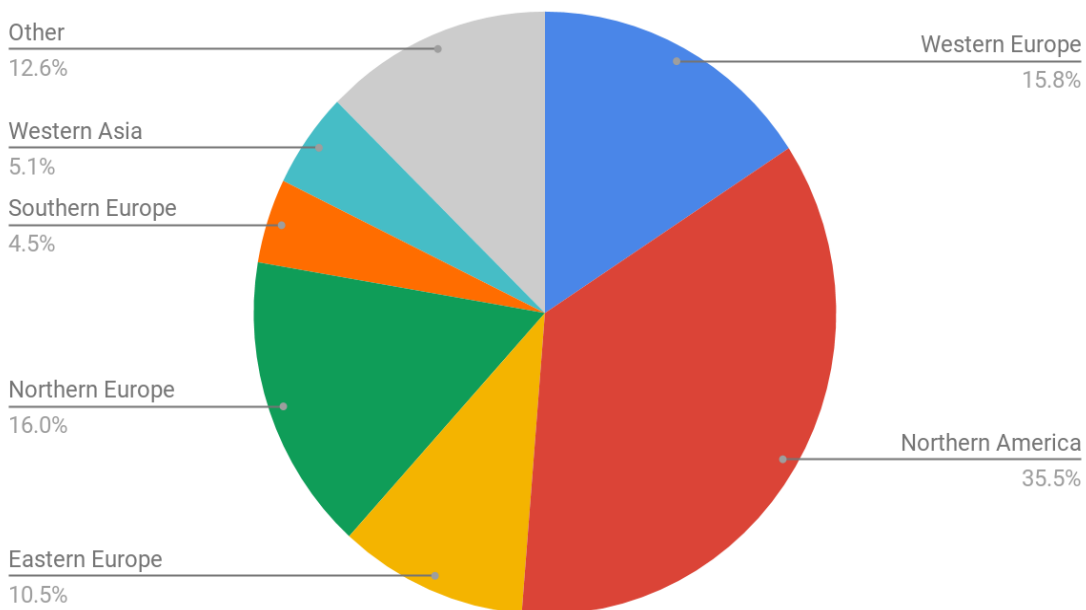
⁸ The first online digital edition, *Begrenzte Flucht* (<https://begrenzte-flucht.ehri-project.eu/>), was developed in cooperation with Zukunftsfonds der Republik Österreich. A subsequent digital edition, *Early Holocaust Testimony* (<https://early-testimony.ehri-project.eu/>), has more recently been made available but we do not yet have sufficient data to reliably analyse traffic growth.

EHRI Sites: Mean Quarterly Traffic Growth 2017-2020

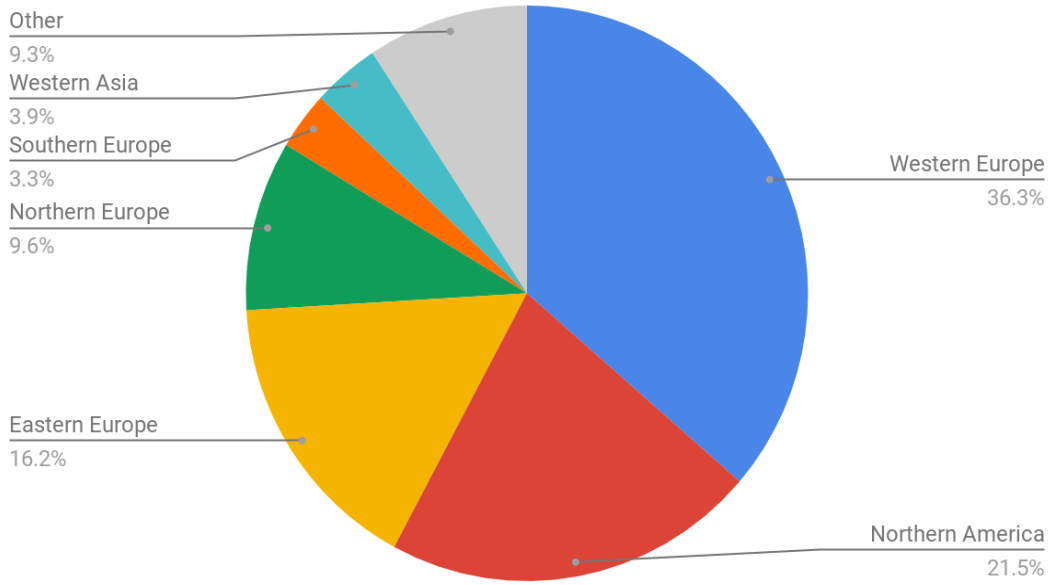


Google Analytics also provides us with information about the geographical location of visitors to EHRI’s services. The following charts show the geographical distribution of web traffic to the Document Blog, Digital Editions, Project site and the Self-Guided Online Course.

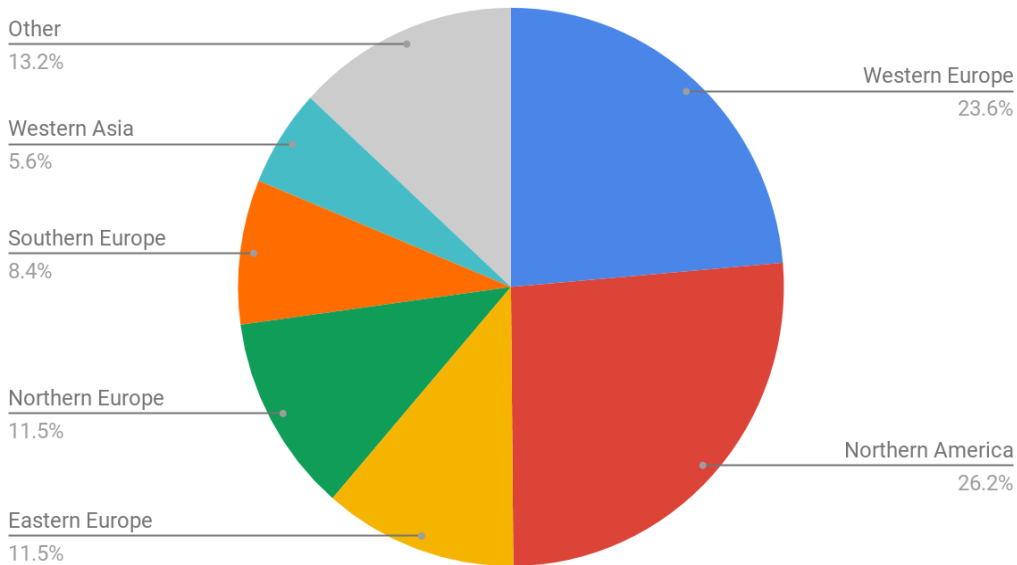
EHRI Document Blog: User Distribution



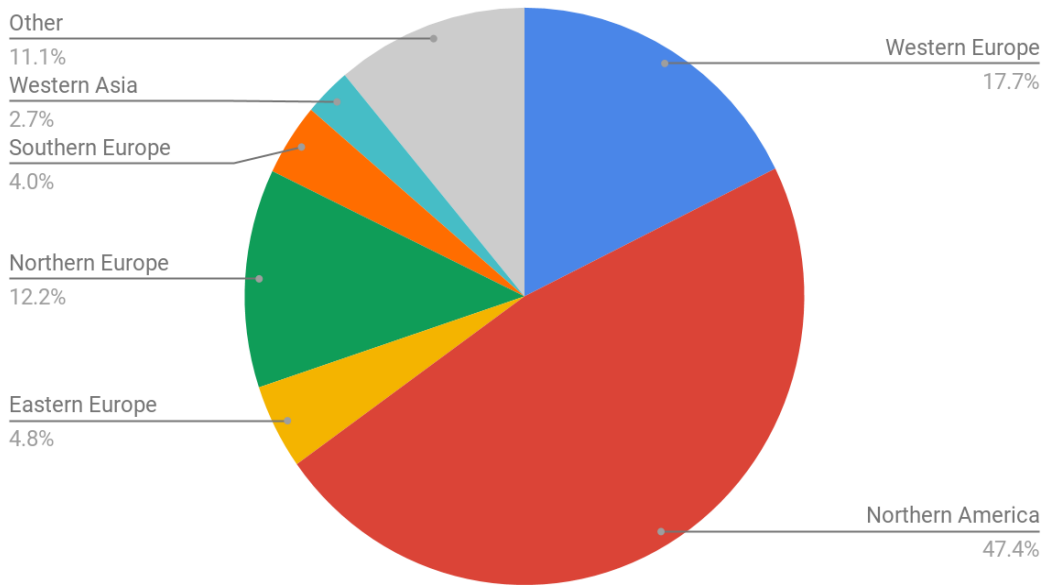
EHRI Digital Editions: User Distribution



EHRI Project Site: User Distribution



EHRI Self-Guided Course: User Distribution



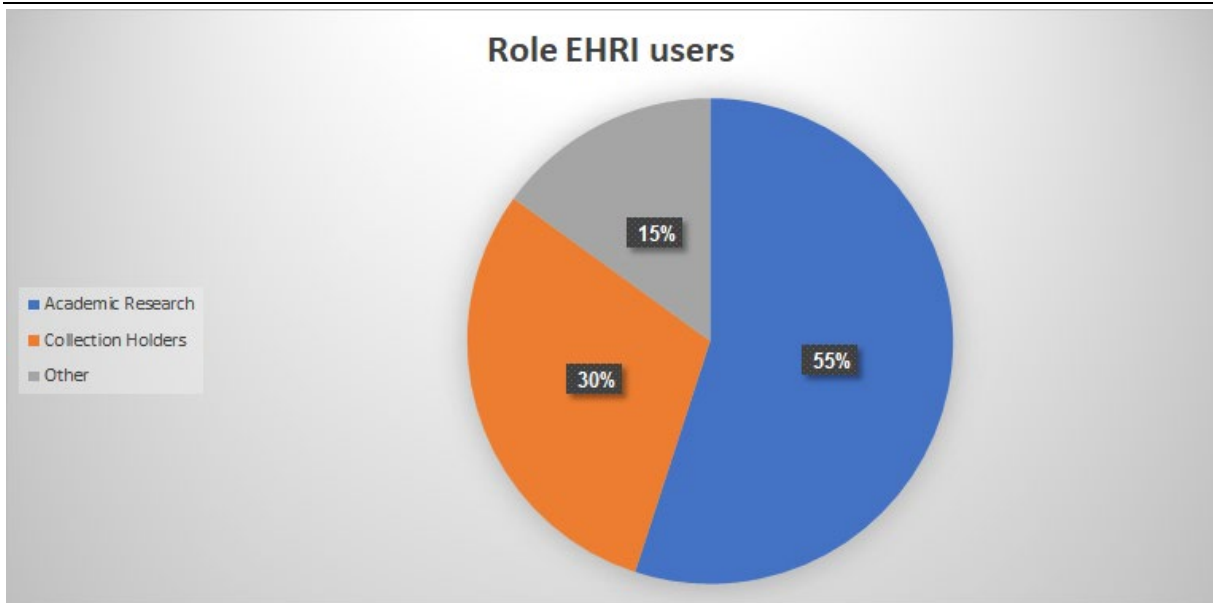
2.3 Conclusions on past users of EHRI services

The multiple services provided by EHRI over the last 10 years have allowed for inclusion of various user groups. The main user groups have been academic researchers (PhD, postdoctoral researchers or professors in the academic fields) and collection professionals (archivists, librarians, curators). The information available about registered users of the Online Portal also shows academic researchers as the largest group. Moreover, for use of the EHRI Portal, both registered users' information and the Google Analytics data show a higher use in Western Europe and North America than Eastern/Southern/Northern Europe. Though participation from Eastern Europe still has room to improve, the participation from Seminars and Fellowships show stable numbers for Eastern Europe. What the information summarized on other services such as Methodological Seminars, Fellowship programs and Guided Online Courses demonstrates, is that an effort was made to broaden the geographic location of the participants to reach more individuals outside of Western Europe and North America. The Guided Online Course, also attempted to reach a wide user group, dispersed geographically (even beyond Europe, to Asia and Africa), as well as including M.A. students and educators to the participants.

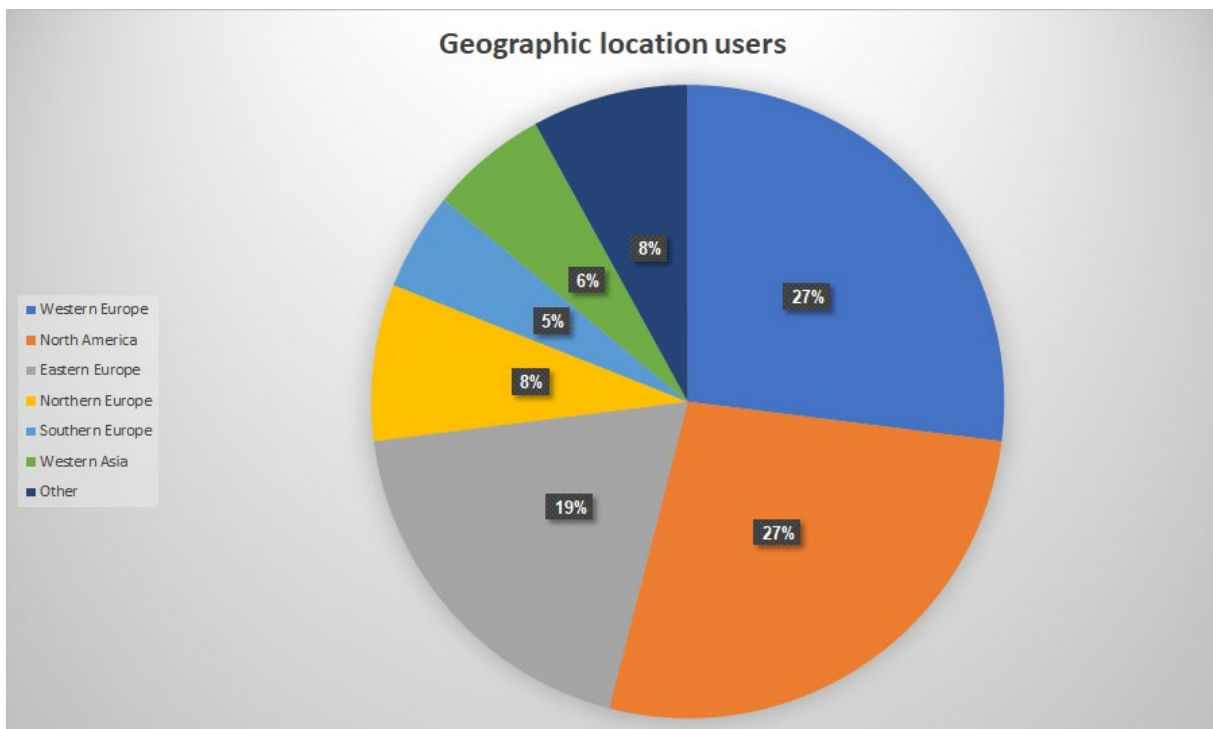
While we can point to an increase in use each year, the overall distribution of users across the regions has not changed dramatically, and Western Europe remains the most dominant region for use of the various services. This can be related to a steady and developed web of Holocaust related institutions in Western Europe.

Using the data available on user profiles for existing EHRI services, both online and physical, the following charts show an approximate distribution of use by user group and geographic location.

The first chart shows an overall distribution of use for the different user groups. The academic research field, collection holders, and others (general public).



The distribution of use by geographic location of users for all services, both online and physical are shown in the following chart:



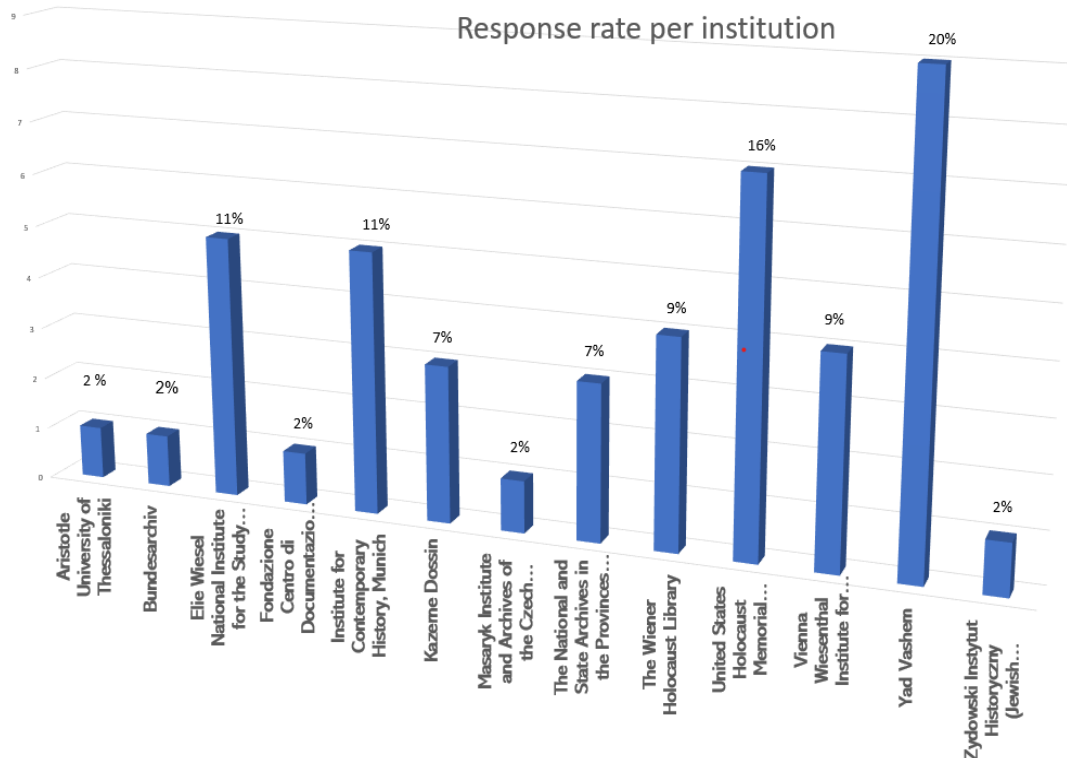
Recommendations: The efforts to increase use of services in wider geographic locations, Eastern, Southern and Northern Europe should continue in order to further bridge the gap in the next phase of EHRI-PP, specifically on use of the online services. The continued promotion of EHRI online services during the in-person programs, which have made an effort to include participants from a broad geographical area, could be helpful in encouraging use of EHRI's online offering in other countries.

3. EHRI User Needs and Innovation Strategy Survey

"The User Needs and Innovation Strategy" survey was developed by WP5 and WP6 and distributed to employees of EHRI partner institutions. The survey was divided into three parts, the first 'General Information' with the purpose of gathering information on EHRI partner institutions, the size of the institutions, the main users of their institutions. The second part of the survey "Research Trends", relevant specifically to WP6, included content related questions and aimed at providing insights into recent research trends in the field of Holocaust studies.⁹ The third part of the survey "Access Provisions and EHRI Services", dealt with access provision of respondents' institutions as well as the respondents' use of existing EHRI services and also addressed the user profiles of main user communities for each institution. The information obtained regarding general information and the sections relating to use of EHRI services in the third part of the survey provides the basis for this section of the deliverable. The questions relating to access provisions will be analysed and used for upcoming tasks within WP5.

3.1 General Information on the survey and its distribution

The respondents of the survey were employees of EHRI partner institutions. We received a total of 45 responses from 13 different institutions:



Among the institutions represented the vast majority defined themselves as archives and/or research centres, 84% and 89% respectively. 75% were also identified as libraries, 48% museums and 45% memorial sites. In addition, one university was represented. The survey was distributed to employees ranging in their roles. The majority of participants in the survey are researchers (17) and archival staff (13), the survey was also filled 6 times by heads of institutions as well as project coordinators, 4 surveys were filled out by librarians.

⁹ D6.1 Foresight Study, February 2021.

3.2 User Communities of EHRI Partner Institutions

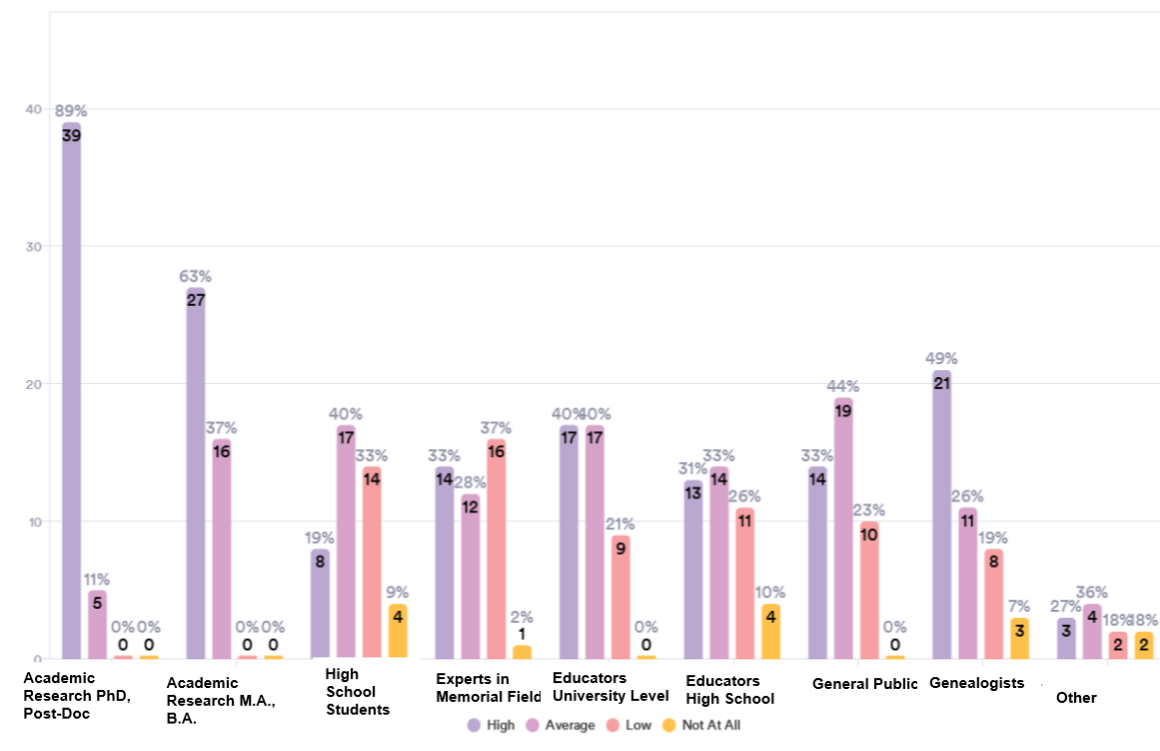
Among the intended purposes of the survey was to gain a better understanding of the user make-up of EHRI partner institutions. A close look at the user communities of these institutions can contribute to a better understanding of the main users of Holocaust related institutions in general. The survey included several questions dealing with the make-up of the user communities of the respondents' institution:

Who are the main users of your institutions?

Several options were given, and the respondents were asked to rate the use of each group. (High, Average, Low, Not at all)

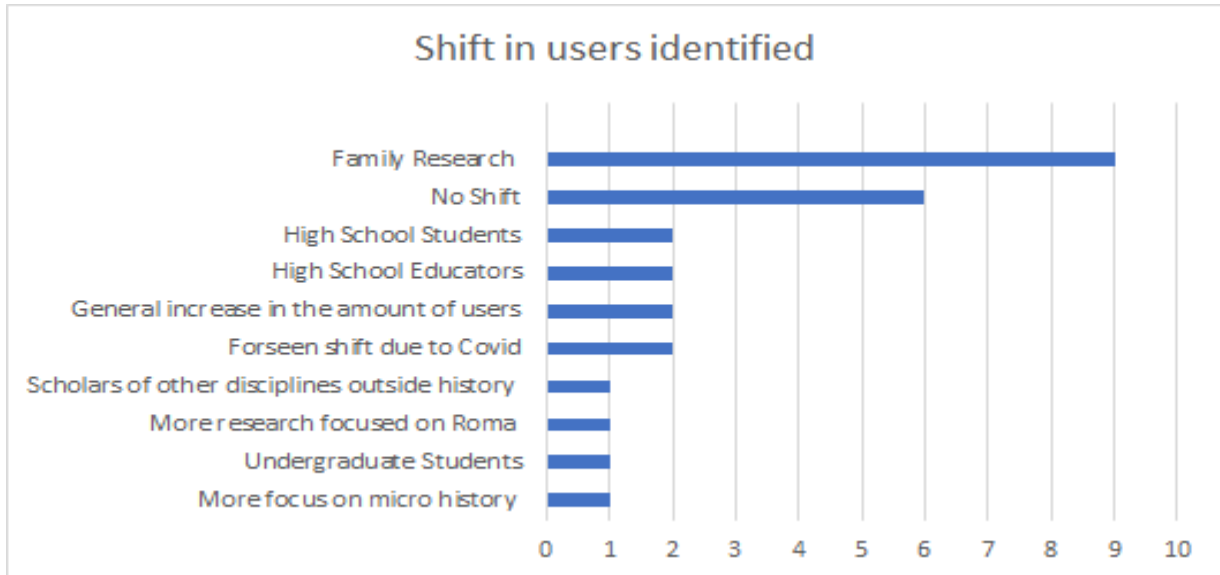
The following graph shows the distribution of main user groups identified by the respondents referring to their institutions. The vast majority of respondents identified academic researchers at a PhD or postdoctoral level as the main user group, 89%. Academic researchers at a M.A. and B.A. levels were identified by 63% of respondents as a high-level user group. Genealogists specifically were considered by 49% of respondents as a high-level user group. Educators at the university level were considered by 40% of respondents both high and average level users, while the educators at high school and elementary school levels count for 31% of high use of respondent's institutions. Experts in the memorial field were identified by 33% of respondents as a high user group. The general public was identified by 33% of respondents as a high user group. As for high school students 19% of respondents considered them a high user group. Several other groups were identified such as directors, film makers, fiction writers, journalists, public servants, state agencies, family of victims, lawyers.

17. Who are the main users of your institution?



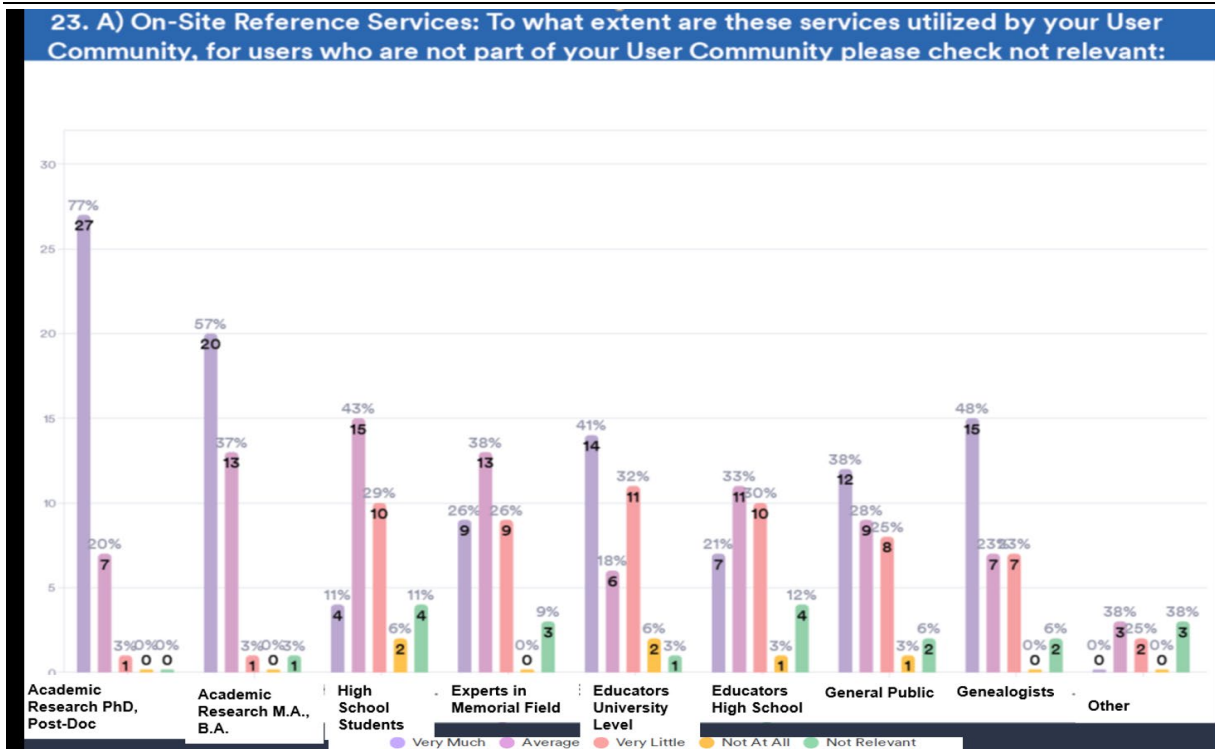
Have you identified a shift/ change in users in recent years?

The question was geared towards assessing whether the institutions felt a shift or change in recent years regarding their user communities. 27 respondents answered this specific question among which 22% did not identify any change in their user communities. Among the changes identified the most significant increase was of family research/genealogy, expressed by 9 of the 27 respondents for this question (33% of respondents).

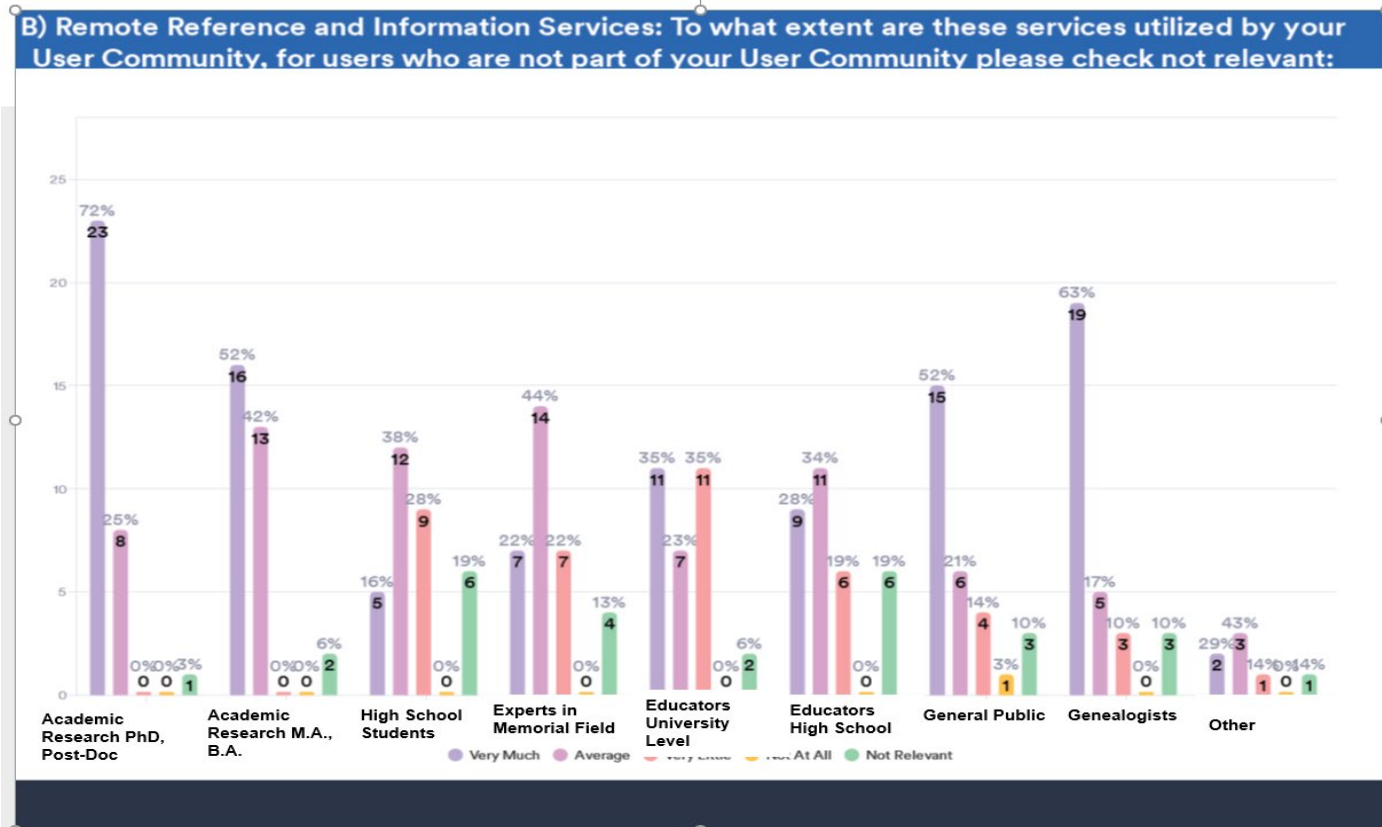


To what extent are these on-site reference services utilized by your user community?

Another question was intended specifically to identify main user groups for the specific service of reference and information. The reference and information services are provided by 98% of the respondent's institution. The vast majority (97%) offer these services both on-site and online. Respondents were asked to rate the use of the on-site services by user group. 77% of respondents considered academic researchers, PhD or postdoctoral levels, as using this service very much. B.A. and M.A. level researchers were identified as high users by 57% of the respondents. High school students were considered by 11% as high user group use, most institutions identified high school students as average users of their institutions one-site reference services (43%). Experts in the memorial field were considered by 26% of respondents as high users. As for university level educators, 43% of respondents considered this group as a high user group for their institution while 21% considered high school educators as a high user group in their institutions. The general public were considered by 38% of respondents as a high-level user group. While genealogists were considered by 48% of respondents as a high-level user group.



As for the off-site, remote reference services, again, the most relevant group for use of this service was identified as PHD and postdoctoral researchers at 72%. The genealogists were considered second highest in use of the remote services available at 63% of respondents higher than the on-site use. Both the general public and B.A., M.A. academic research was valued at 52% of very much use. It is interesting to note that almost all groups make larger use of on-site access than the online services offered by the various institutions with the exception of the genealogists and the general public.



3.3 Conclusions on Defining EHRI’s User Community

The results of the survey demonstrate that the main user community of EHRI partner institutions are within the Academic field, first of all, established academics as well as postdoctoral and PhD researchers and, secondly, M.A. and B.A. students. The academic research field has been the main EHRI user community in previous EHRI projects (EHRI 1 and 2).

EHRI User Community:

The academic field will remain the main user groups of a permanent research infrastructure. In addition, collection holding professionals as well as digital humanities experts will continue and will likely be a growing part of the EHRI user community in the future.

In addition to these user groups the user community for EHRI-PP can be expanded to other user groups identified by EHRI partner institutions in the survey: M.A. research students, educators, media professionals, as well as the general public.

EHRI 1, EHRI 2	Potential Additional User groups
Academic Researchers (PhD, postdocs, lecturers, professors)	M.A. Research Students
Collection Holding Professionals (archivists, librarians, curators)	Educators (include various fields- such as teachers, tour guides)
Digital Humanities Specialists	Media Professionals (journalists, film makers, photographers)
General Public	Increased outreach General Public

Recommendations on expansion user community:

M.A. Students:

While M.A. students have taken part in EHRI services in the past, their participation was not widespread. An attempt to reach out to more M.A. students could prove valuable specifically to research students who use archival sources for their work and potentially for a future in academia.

Educators:

As the survey has shown educators at B.A./M.A. levels are part of all respondent institution's user communities, 40% as high-level group and 40% average user group. As for high school and elementary level educators there is a significant drop, 21% of respondents indicated that this group was a high user community. Educators can include teachers at different levels, tour guides or staff of memorial sites for any individual in the field of pedagogy. While educators have been users of EHRI services in the past, their participation was predominantly in the Online Courses. Additional EHRI services could prove beneficial for educators in the Holocaust field. Specifically, with the increased dissemination of misinformation relating to the Holocaust, educators could prove a valuable group to combat this issue.

Media Professionals:

While this group which can include journalists, film makers, photographers and other professionals in the field, has not been a specific targeted user community in past EHRI phases, with the exception of a workshop that took place dealing specifically with films in the Holocaust,¹⁰ the survey done in partner institutions showed an interest for this profession in accessing data on the Holocaust that can be used for various projects. Existing online services such as the Portal, Online Editions, and the Document Blog can already serve this user community. Efforts should be made to publicize within that group the various services and their use.

¹⁰ "Holocaust Archival Footage as a Historical Source: Methodology and Ethics in the Digital Era" 2016.

General Public

The survey has shown that the general public is an important user group for many Holocaust institutions. In the context of EHRI, while the general public was not specifically targeted as a user group, the online services offered through open access are important to the larger public and have been used and will likely continue to be used by the general public. The data available on the registered users of the Portal for example show that 12% were interested in family research and 7% defined themselves as educators. In addition, among the registered users are authors, and journalists. A recommendation would be to promote more outreach among the general public who could benefit from a variety of services provided by EHRI.

Regarding the field of genealogy, a specific category within the general public, this have been a growing user group among Holocaust related institutions. As the results of the survey show a growing number of genealogists are visiting the institutions and requesting archival information for family research. The transnational dimension is also an important factor to consider, as Holocaust survivors often moved from one country to another the search for documentation on victims of the Holocaust is transnational in nature. While EHRI services are not targeted directly towards this user community, and it is agreed that many partner institutions (and others) have a certain expertise in this specific field, EHRI could address the growing trend in different ways, e.g. by making identification of names databases in the EHRI Portal easier accessible, offering Seminars/Workshops that deal with the topic, or providing staff Training Seminars for reference workers at EHRI partner institutions that specialize in name search and family research.

4. Size of EHRI User Community

The user community, as defined above, transcends academic research to include educators dealing with the Holocaust, collection holders, media professionals and the general public. The Holocaust research community is large and diverse and the potential size of the user community for a permanent research infrastructure is considerable. EHRI has provided a variety of services both through online access and through physical access to a growing user community since 2010. The following table indicates the average number of sessions per month for the online service for 2020.

Average number of sessions per month for online service 2020

Portal	Online Editions	Documents Blog	Website	Online courses - Training
16,985	261	1,232	3,014	1,640

As the above table shows the average yearly use of the online services total 23,105 monthly sessions (277,263 a year). The figures for 2020 show an increase of 22% from the previous year. As for the services offered through physical access the following table shows the number of participants for the different services in EHRI 2 phase (2015-2019)

Number of participants Physical Services 2015-2019

Fellows	Seminars	Conferences	Workshops	Guided Courses
143	148	~350	147	75

The physical access services provided during EHRI second phase average about 288 participants a year. The number of participants and events held is determined by the initial budgetary planning and work package objectives. The limited number of participants is a result of a selection process.

EHRI has had a social media presence since 2013 which includes both a Twitter and Facebook account. The EHRI Twitter account has 3,757 followers (March 2021), representing an increase of 21% over the previous year. The EHRI Facebook page, launched in 2017, has 2,611 followers (March 2021), an increase of 35% over the previous year.

Calculating an exact number of total users for both physical and online services is challenging. The online services are harder to deduct the exact number of users considering each user can have several sessions. If we consider the Online Portal has a total of 2,125 registered users, and we assume 1/10 of all users created a profile on the Portal that would mean that our total virtual users would be approximately 21,250. We assume that most of our physical users have also used EHRI services online. We can estimate approximately 21,250 total users a year.

Looking at the number of returning users (those that initiated multiple distinct sessions) to the services provided online over the course of 2020 tells a similar story. A total of 24,690 visitors returned at least once to EHRI's Portal, Project, Blog and Training sites in this period, which when adjusted downwards to account for duplicates (the same users visiting multiple sites) supports our estimation of 21,250 total users for both online and physical services.

Number of returning users 2020

	New / One-off	Returning
Portal	166,682	18,152
Project	26,871	3,535
Blog	11,499	1,275
Training	15,830	1,728

The following table below shows the distribution of users per category. The distribution is based on the chart in section 2.3. conclusions on past users of existing EHRI services, where using the information available we have estimated that 55% of users are within the academic research field, 30% are collection holders, and 15% are other user groups which can include the general public, educators, media professionals.

Estimated total amount of users per category per year

Academic Researchers (including the digital humanist experts)	11,688
Collection Holders	6,375
Other (General Public)	3,188
Total:	21,250

Estimated potential size user community

Collection holders	7,500
Educators	4,000
Media Professionals	4,000
Academic Researchers (including Digital Humanists Specialists)	40,000
General Public	12,000
Total	67,500

The figures presented above have been deducted by an analysis of estimates of total audience EHRI could potentially reach.

Collection holders include archivists, librarians, curators. Considering there are approximately 2,500 institutions with Holocaust related material. Many institutions already provide data for the Portal, and outreach to additional institutions is planned for the future. The size of these institutions varies considerably, if we consider an average of 3 employees per institution that would benefit from EHRI services, we reach a potential user community of 7,500 for this group.

Academic Research ~ 22,800 scholars have expressed an interest in Holocaust studies on academia.edu. It should also be considered that researchers from other disciplines delve into Holocaust related topics as well, and can be considered potential users of EHRI services, including experts in the field of digital humanities. A target of 40,000 Academic Researchers is realistic.

General Public: The general public can include genealogists and individuals interested in information about the Holocaust. This is a huge community. JewishGen – a site enabling Jewish family research – has more than 500,000 registered users, and EHRI has always attracted significant interest from the general public. Targeting 12,000 users under this category therefore seems realistic.

Educators: can include teachers at different levels, tour guides or staff of memorial sites for any individual in the field of pedagogy in the field of the Holocaust. Considering the large size of this user group, 4,000 potential users would be a conservative estimate.

Media Professionals: This user group can include photographers, journalists, individuals in the film industry. The potential user community overall for media professionals is quite large. We estimate a potential of 4,000 users from this group.

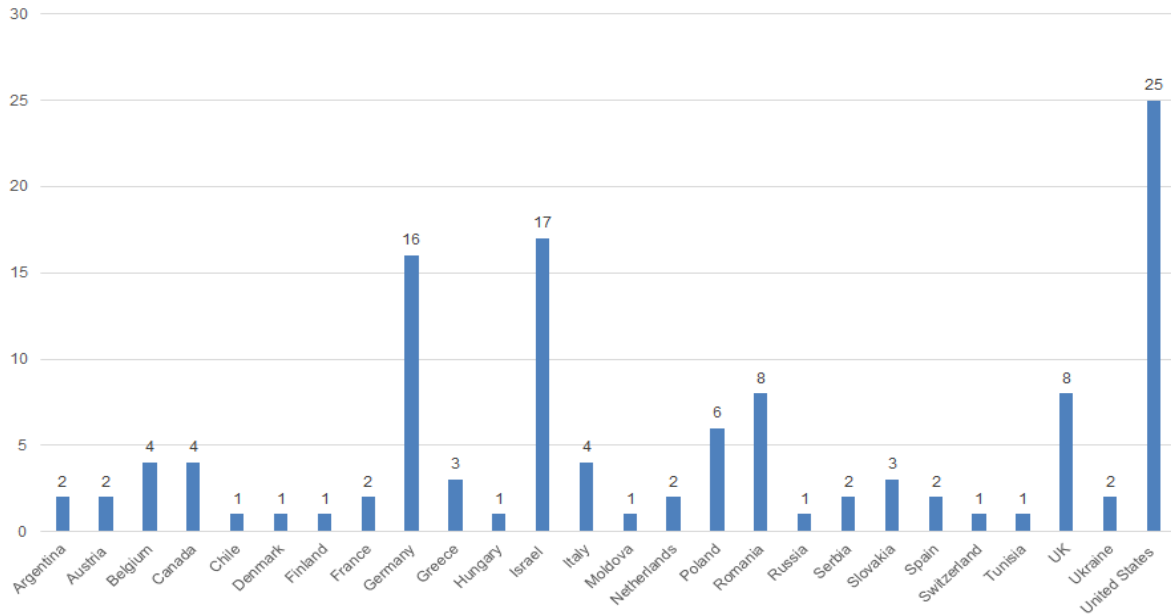
5. EHRI User Access and Training Strategies Survey

5.1 Content and Distribution of the survey

The second component of this deliverable was to assess whether the existing services offered by EHRI fulfil the users' current and potential future needs. After identifying EHRI's intended user community, a second survey was drafted intended for current and potential future users of EHRI services. The survey was prepared on the online platform SurveyMonkey and was conducted anonymously. The survey consisted of three parts: In the first part - General information - we aimed to learn more about the respondents, specifically their professional and disciplinary backgrounds. The second part of the survey included questions relating to access provisions, where we aimed to gain a better understanding of the expectations of EHRI users relating to access. Finally, in the third part of the survey-EHRI services - we aimed to learn more about the use of various EHRI services, and gain a better understanding of user expectations and needs in terms of services provided.

The survey was disseminated widely on the EHRI website, and other social media platforms. In addition, the survey was distributed among former participants of EHRI physical services and participants of the Guided Online Course as well as contributors to the Document Blog. Efforts were made to distribute the survey among additional user groups identified, including educators, media professionals, M.A. research students as well as other academics who were not previous users of EHRI services. The range of user groups and varied familiarity with EHRI services proved a challenge in drafting a survey that would address all respondents. Certain questions, specifically those dealing with EHRI services, were left out by those who have never used the services.

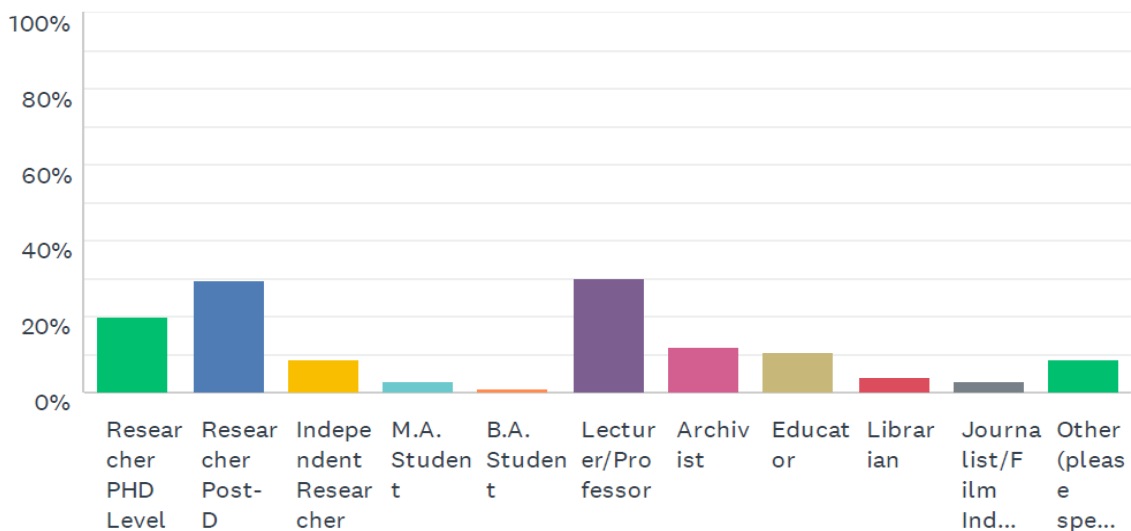
A total of 129 responses from 26 different countries were received. An effort was made to distribute the survey in various countries. 31% of respondents were from Western Europe, 24% from North America, 14% from Israel, 13% from Eastern Europe, 13% from Southern Europe, 2% from Northern Europe and 3% from South America, one respondent was located in North Africa.



User profile: While efforts were made in the distribution of the survey to reach additional user groups such as educators, media professionals, and within the research community, M.A. students, the vast majority of respondents were researchers, 88% of respondents identified themselves within the academic research field (PhD, postdoc, lecturer, independent researcher), 11% were identified as archivists, 10% as educators, 4% librarians, 3% journalist/film Industry, 3% M.A. level students, one respondent was at the B.A. level.

Q3 Role, Please indicate all which apply:

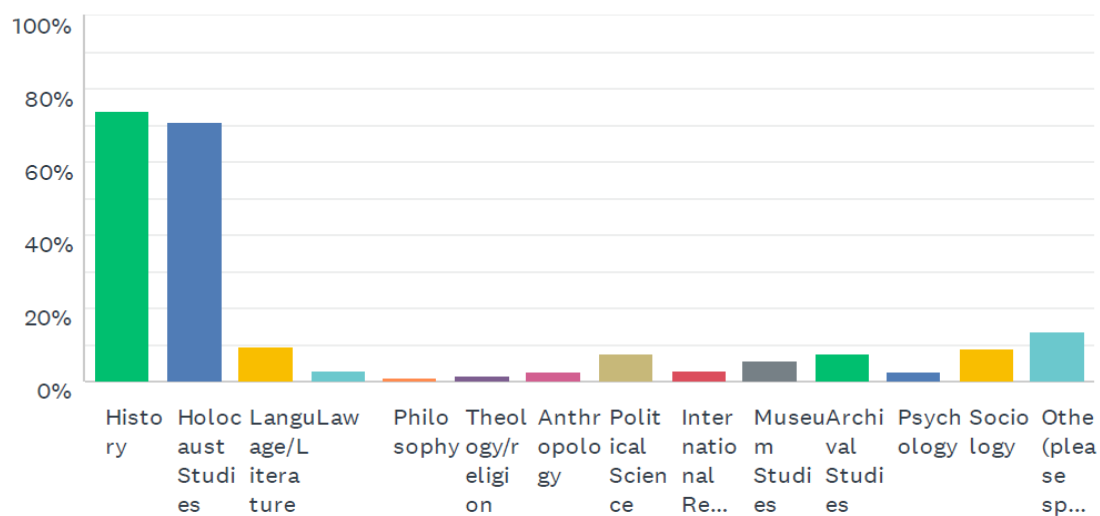
Answered: 126 Skipped: 3



The Research disciplines of respondents: While most respondents identified History and Holocaust Studies as their research disciplines, 74% and 70% of respondents respectively, various disciplines outside history were identified. Among the most prevalent: close to 10% of respondents studied in Language/Literature, 7% Political Science, 6% Museum Studies, 7% Archival Studies, 9% Sociology. Among the other disciplines indicated: Education, Communication, Gender Studies, German Studies, Jewish Studies. The diverse disciplinary background of the respondents corresponds to the results presented in work package 6, Research and Innovation¹¹, and should be considered in the development of EHRI services that are geared to multidisciplinary groups.

Q5 Research discipline, please indicate all which apply:

Answered: 124 Skipped: 5



5.2 Expectations in term of Access:

EHRI's core mission is to improve access to Holocaust documentation and to facilitate innovative, trans-national and trans-disciplinary research, through access to a range of services provided both online and physically. The question of access, and specifically understanding the challenges relating to access that professionals dealing with the Holocaust face, can help us in assessing whether our current services answer the needs of users. In order to assess what services could be beneficial for EHRI's user community, we sought to understand what challenges the EHRI user community deals with relating to access. Several survey questions addressed this issue.

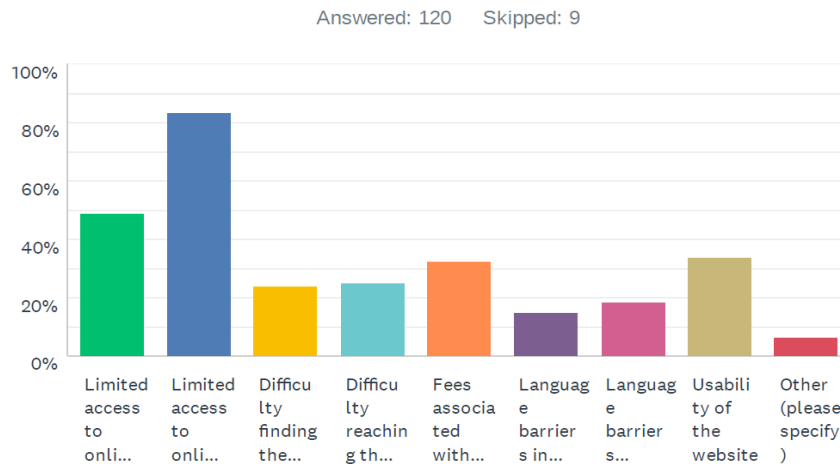
Which of the following challenges have affected your research endeavours (online)?

The two main challenges identified by the respondents related to access to archival descriptions and to archival material. 83% of respondents identified the lack of online archival material as a challenge. 49% considered the lack of availability of archival descriptions online as a challenge. Fees associated with acquiring digital scans was identified by 33% of

¹¹ D6.1 Foresight Study, February 2021.

respondents as a challenge. Additional challenges were identified including contacting the archives where 24% of respondents indicate a challenge in finding the contact information for archives, while 25% identified a difficulty in reaching out to reference and information services of archives. Usability of archives website was considered a challenge by 34% of respondents. Lastly, language barriers were considered by 18% of respondents as a challenge.

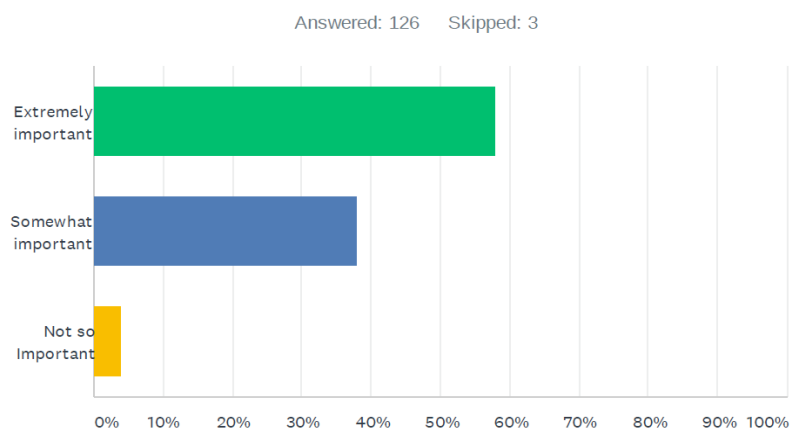
Q9 Which of the following challenges have affected your research endeavors (online)? Indicate all which apply:



How important would you consider the role of the Archivist in your research?

58% of respondents considered the role of the archivist as extremely important while 38% considered the archivist's role as somewhat important. Only 4% of respondents considered that the role of the archivist was not important to their work.

Q12 How important would you consider the role of the archivist in your research?



How would you evaluate the availability of online finding aids?

24% of respondents considered the availability of online catalogues excellent, while the majority of respondents 67%, considered the availability of online catalogues as average. 8% considered the availability as poor.

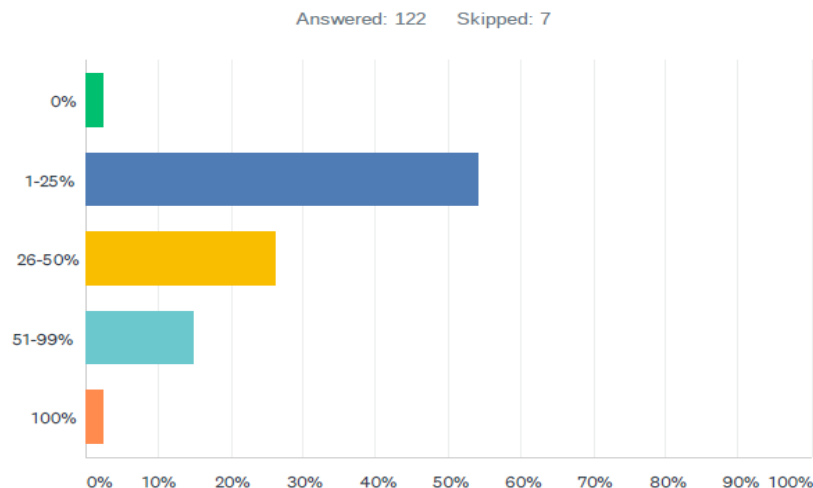
How would you evaluate the availability of online archival material?

When asked on the availability of online archival material 54% considered an average availability while 29% identified the availability of online material as poor.

What percentage of archival material you work with is retrieved online?

54% of respondents indicated that between 1-25% of archival material is retrieved online, 26% considered 26-50% of their archival material is retrieved online. 15% of respondents considered they used 51-99% of archival material retrieved online.

Q16 What percentage of the overall archival material you work with is retrieved online?

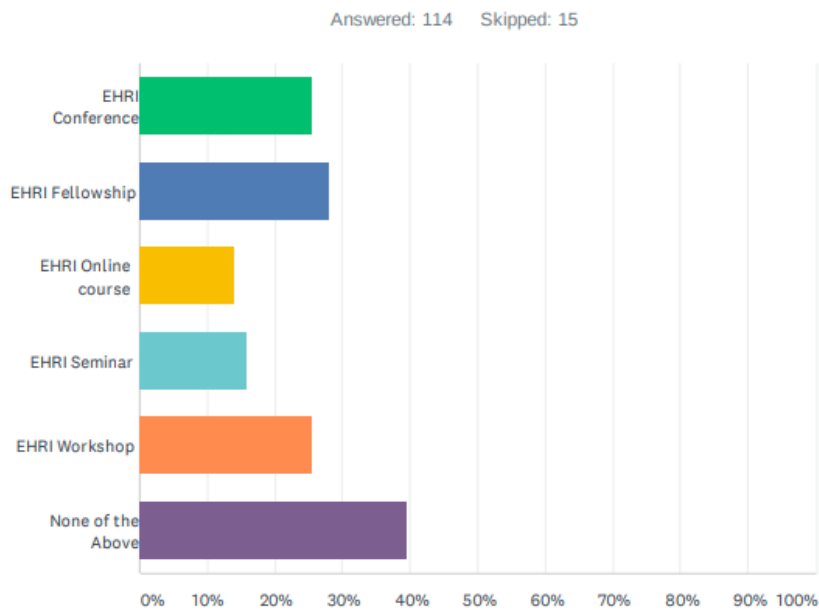


The questions related to access demonstrate that the need for access to archival descriptions is key among users, and this among all user groups. Specifically, the question relating to the role of the archivist is important to consider when evaluating the use of specific services. While access to descriptions and online material is important to the user, the help of specialists within the field in this case archivist are also vital. Thus, providing access to material should continue to be coupled with possibilities for expert opinion reference, through fellowship programs, or indication of reference services/contacts for each archive indicated in the Portal for example. The survey also indicated that it can be challenging for some to contact or find the necessary information on specific archives for their research. The EHRI Portal includes descriptions and contact information for archives in the Archival Institutions sections. Perhaps an additional effort to promote this information would be helpful. Moreover, the work being conducted in EHRI-3 WP9 which will add descriptions specifically of micro archives will surely respond to this challenge expressed by a number of users. The challenge raised by a third of respondents relating to the fees associated with obtaining digital copies should also be considered, to assess how EHRI can assist researchers in obtaining digital copies.

5.3 EHRI Services

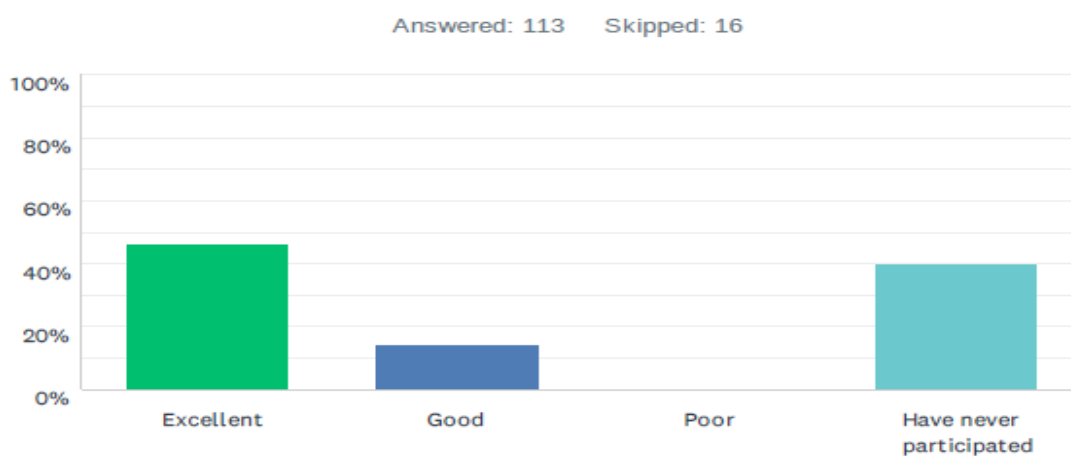
The third part of the survey dealt with interest in services provided by EHRI. As aforementioned the survey was distributed to past users of various EHRI services as well as to potential new user groups some of whom are not well acquainted with the services provided by EHRI. About 60% of respondents had indicated that they had taken part in one of the EHRI's physical access services (Conference, Workshop, Seminar, Fellowship Program) 40% had indicated they had never participated in these specific services.

Q23 Which of the following services have you taken part in?



For those who did participate in one or more of the physical access services they were asked to evaluate their experience. 46% assessed their experience was excellent, 14% good. No respondent indicated a poor experience.

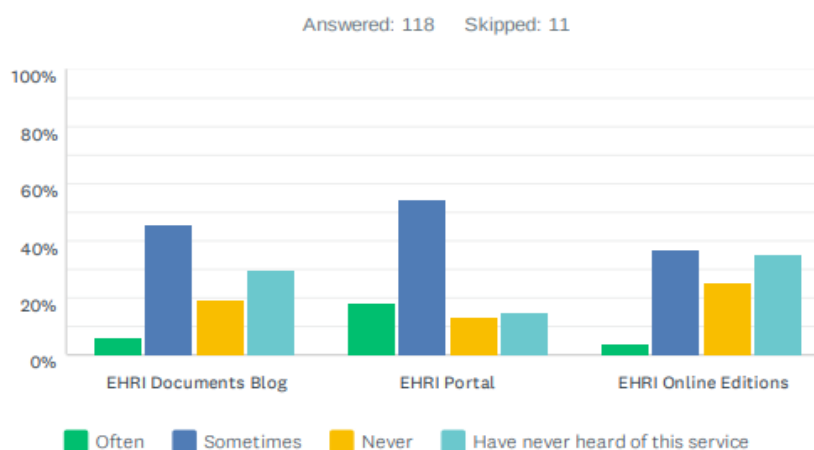
Q24 How would you evaluate your experience



How often do you use the following services?

The question was asked relating to three online services provided by EHRI- the Portal, the Document Blog and the Online Editions. The EHRI Portal saw the highest use with 17% of respondents indicating they often use the Portal and 53% indicating they sometimes used this service. Only 13% of respondents indicated they never used the Portal and 14 % of respondents stated that they had never heard of the service. Seeing as the distribution of the survey was not exclusive to current EHRI users, this number is not surprising. The Document Blog and the Online Editions had similar response rates in terms of use. Most respondents indicated they sometimes used these services, 45% for the Blog, and 35% for the Online Editions. 19% of respondents indicating they had never used the Blog, while 29% had never heard of the service. As for the Editions, 25% of respondents declared never having used the service and 34% had never heard of the service.

Q17 How often do you use the following services?



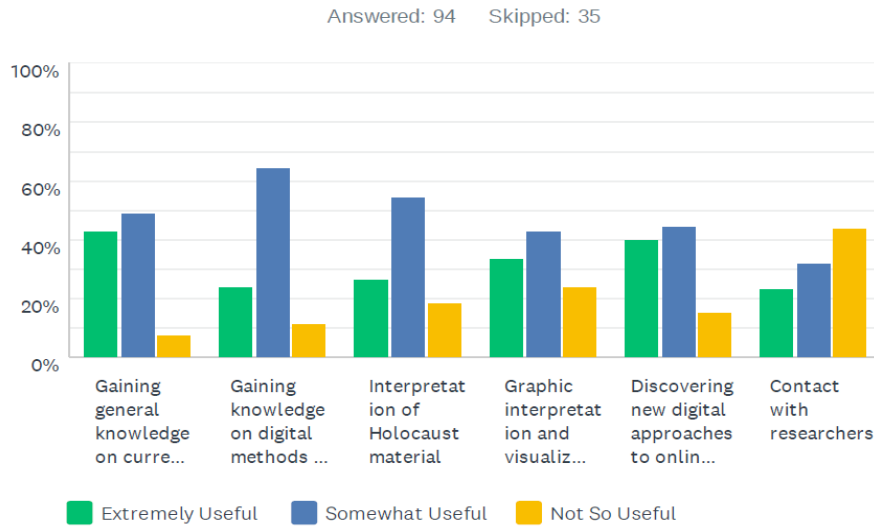
Several questions were included dealing specifically with EHRI services provided online. We hoped to assess in what ways the various online services are helpful to the users and specifically how or for what reasons these services are used. These questions targeted specifically users acquainted with the online services. The respondents were asked to rate the helpfulness of the specific services (extremely useful, somewhat useful, not useful at all). For the sake of this analysis we have taken together the answers for extremely useful and somewhat useful and in this way can assess which aspects of the online services are useful overall to the users.

How useful has the EHRI Document Blog been for you in the following areas?

The question was answered by 65 users of the Document Blog. 93% of respondents indicated that the Document Blog was useful in gaining knowledge on current research on Holocaust related topics. 85% of respondents considered the Blog useful in gaining knowledge on digital methods for Holocaust research. As for help in interpreting Holocaust material 82% considered the Document Blog as useful for this purpose. 74% considered the Document Blog as useful in respect to the graphic interpretation and visualizations it offers to illustrate and support written research. The Document Blog was indicated by 85% of respondents as useful in discovering new digital approaches to online resources and Holocaust research. Regarding

the possibility of contact with researchers 50% considered the Document Blog useful for this purpose.

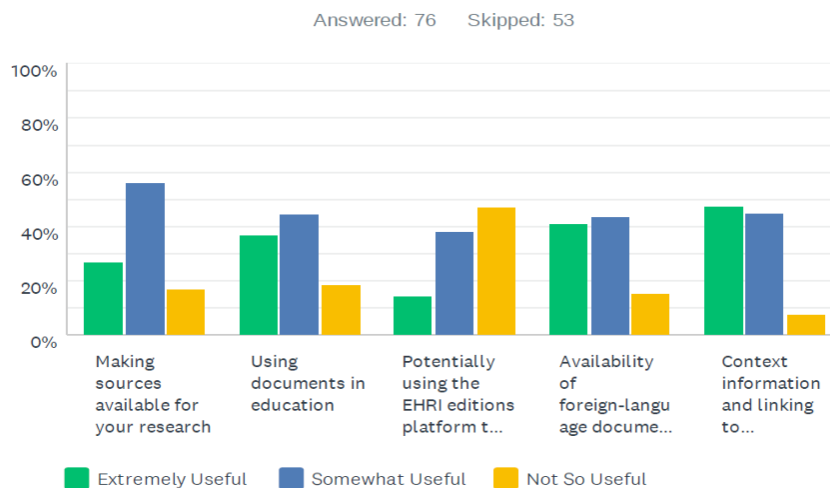
Q18 How useful has the EHRI Document Blog been for you in the following areas: (If you have never used this service please indicate so in the "other" option)



How useful have the EHRI Online Editions been for you in the following areas?

83% of respondents considered the Online Editions as useful in making sources available for research. 82% of respondents considered the Online Editions as useful in using documents in education. 85% of the respondents indicated that the Editions are useful in making available foreign-language documents in English, while 93% considered that the Online Editions are useful in providing context information and in linking collections to the EHRI Portal. Regarding the potential to use the EHRI editions to build their own editions, this was indicated by 53% of respondents as useful.

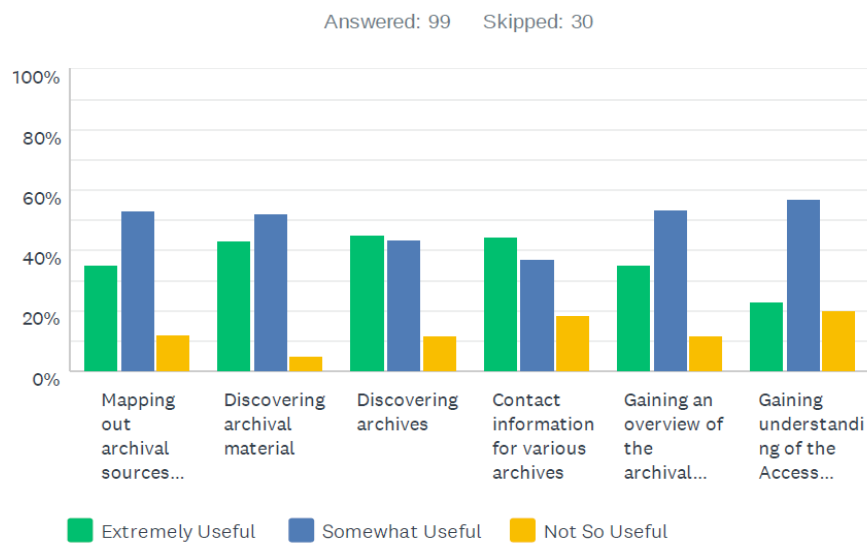
Q19 How Useful have the EHRI Online Editions been for you in the following areas :(If you have never used this service please indicate so in the "other" option)



How useful has the Online Portal been for you in the following areas?

A question relating to the usefulness of the Online Portal revealed the use of the online Portal is considered by 90% of respondents as useful in discovering archives. 98% considered the Online Portal as useful for discovering archival material. The information provided on the Portal for contact of various archives was considered by 73% of respondents as useful. 74% respondents considered that the Portal was useful in mapping out archival sources before a trip to archives. 81% of respondents considered the Portal useful in gaining an overview of the archival situation in a specific country. The usefulness of the Portal for understanding the access policies of various archives was considered by 71% of respondents as useful.

Q20 How Useful has the EHRI portal been for you in the following areas:(you have never used this service please indicate so in the "other" option)

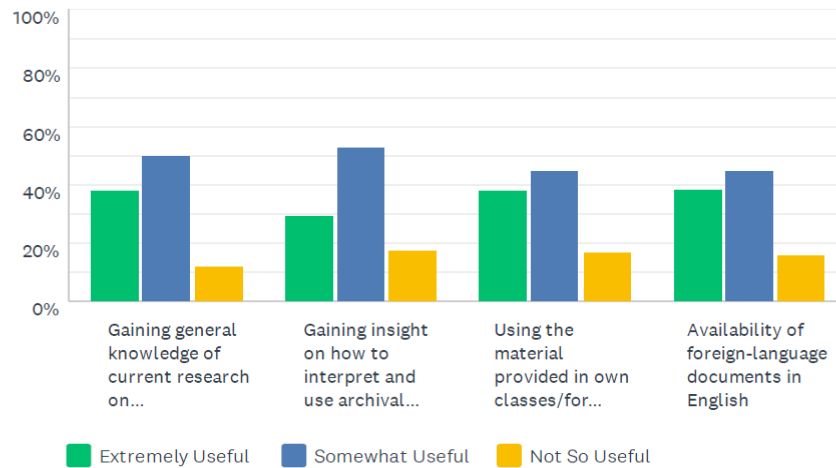


How useful have the EHRI self-guiding courses been in the following areas?

88% of respondents considered that the Self-Guided Online Courses were useful a in gaining general knowledge of current research on Holocaust related topics. 82% of respondents considered the courses as useful in gaining insight on how to interpret and use archival material. 70% of respondents considered the courses were useful in using material provided for educational purposes. 76% considered the courses useful for making available foreign language documents in English.

Q21 How useful have EHRI the self-guiding online courses been in the following areas: (If you have never used this service please indicate so in the "other" option)

Answered: 75 Skipped: 54



Would you be interested in participating or would you recommend participation in one of the following services?

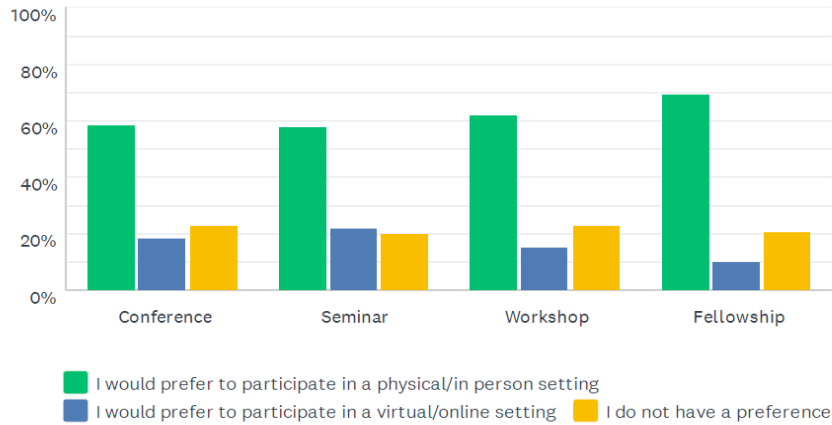
When asked about interest in participating or recommending participation in one of the physical access services the response was extremely positive. Most respondents indicated an interest for all services, 88% conferences, 71% fellowships, 79% seminars, 84% workshops.

If you had an option between a physical/in person vr. an online/virtual setting, what would be your preference for the following services?

This past year has posed various challenges in providing services physically due to the constraints of the pandemic. With that in mind, a question was asked relating to general preference whether physical or online setting for various services provided by EHRI. As the chart below shows most respondents indicated a preference for a physical setting and this for all services listed. 58% for Conferences, 58% for Seminars, 62% for Workshops and 69% for Fellowships. While the virtual setting has proved advantageous in certain contexts (easier to reach a wider audience, lower costs), most of the users would prefer to participate in the different activities in a physical setting.

Q26 If you had an option between a physical/in person vs. an online/virtual setting , what would be your preference for the following services?

Answered: 115 Skipped: 14



The next questions dealt with the interest in Online Courses relating to Holocaust.

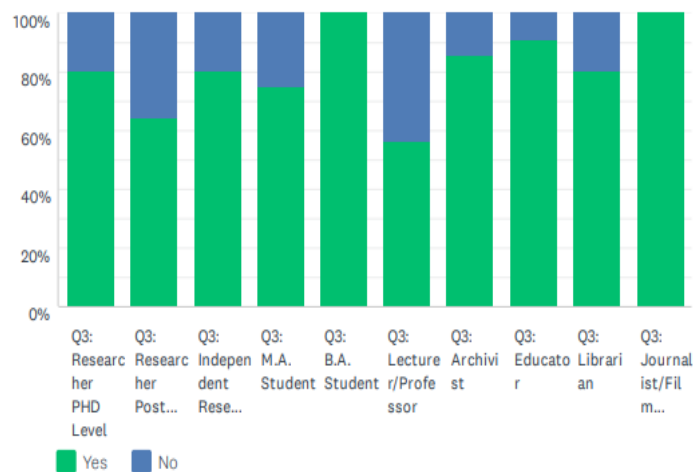
Would you be interested in participating in a course relating to the Holocaust?

71% of respondents answered yes, while 29% no.

The following graph shows the distribution of this response per user group. As the graph shows, all user groups have indicated an interest in participating in an online course related to the Holocaust. The willingness of users on all academic levels is interesting to consider. The online courses are of value for PhD level/postdoctoral/lecturers professors as well as M.A., B.A., educators, librarians and archivists.

Q28 Would you be interested in participating in an online course related to the Holocaust?

Answered: 107 Skipped: 13



The following question asked if the respondents would recommend participation in an online course on the Holocaust and here the affirmative response was of 90%.

If the answer was yes to the previous question, please indicate the main reasons for wanting to participate in or recommend participation in an online course?

When asked what the main reasons were for wanting to participate in or recommending an online course, most respondents indicated the acquiring of general knowledge (60%), acquiring information for research (66%), the flexibility of the online format (53%) as the main reasons for wanting to participate in or recommend participation in an online course. The ability to gain any form of accreditation was indicated by only 10% of participants. This could very well be due to the relatively low number of M.A., B.A. respondents as the majority of respondents were post graduate academics who would be less interested in accreditation.

What would you consider the main inconveniences of an online course?

Regarding the inconveniences perceived by respondents 83% considered the lack of face to face communication as an inconvenience, 16% indicated that the requirement for self-discipline as an inconvenience, 10% the lack of accreditation, and 10% the lower quality the online course. Several respondents added that the lack of possibilities for networking as well as the lack of continued discussion after the formal class was an inconvenience to the online course.

What topics would you like addressed in an online course?

38% of respondents indicated they would be interested in taking a course relating to general topics on the Holocaust, 68% indicated more micro-history regional perspectives, 67% courses on archival sources, 58% comparative themes. Several respondents added suggestions most focusing on specific topics fields: methodological approaches, demography, genealogy, approaches to research, digital humanities, legal questions (aryanization for example), deportation of Jews during the Holocaust. The results show a preference of micro level topics in various fields.

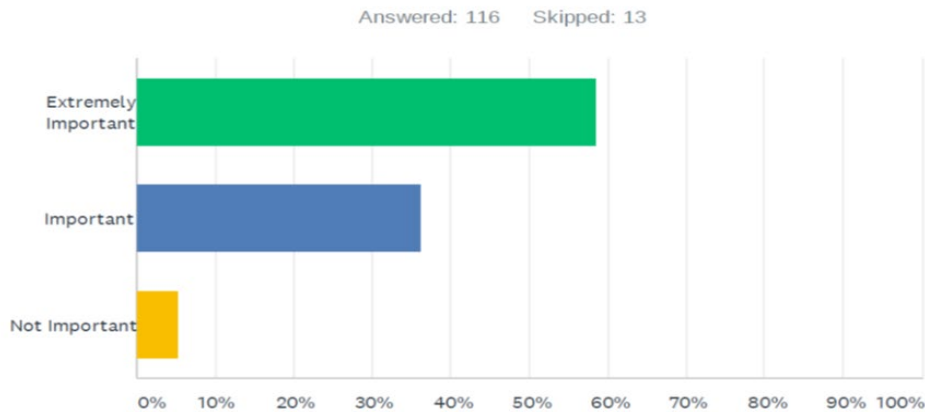
How would you evaluate the importance of the use of your native language for the online courses?

Considering EHRI caters to a vast community of users who speak various languages, a question relating to the importance of use of the native language for an online course seemed appropriate and the data can be used to indicate more or less the trends in use of other services. 16% of respondents indicated the use of their native language for an online course was important, 49% indicated it was beneficial but not crucial, 35% not at all important. It is important to note that of those who indicated the use of their native language as being important, the majority (88%) had indicated English as their mother tongue. That is to say, that for English speakers a course in a language other than English could prove challenging.

How would you evaluate the importance of ongoing/long term connection with your peers?

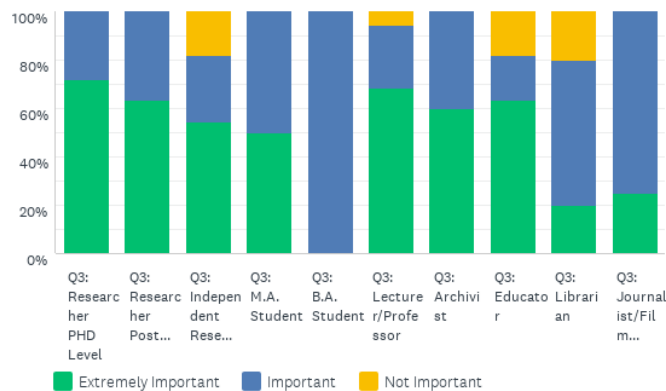
59% of respondents indicated that a continued ongoing connection with peers was extremely important, 36% important, only 5% not important.

Q34 How would you evaluate the importance of an ongoing/long term connection with researchers/educators/archivists (Peers in your field)?



When comparing the answers by role of respondents, the possibility for a long-term connection was considered to be important to users of different categories.

Q34 How would you evaluate the importance of an ongoing/long term connection with researchers/educators/archivists (Peers in your field)?



The survey ended with two open questions looking for more specific information as well as suggestions on how EHRI can improve its services and what additional services would prove beneficial for the user. When analyzing the responses for both these questions, similar suggestions were made. Three main responses have been categorized below.

How EHRI can improve its services? Are there any additional services you would consider particularly helpful?

65 responses were received for these questions (38 for the first and 27 for the second). Three main elements can be drawn from the responses and are categorized as follows:

1) Knowledge about EHRI services

Until the USHMM sent me this survey I did not know much about this program, EHRI can raise awareness by sending information and events to email, to make sure we'll hear about it and

its possibilities, not sure as I wasn't sure these services existed maybe monthly emails to alert researchers to what is out there.

To make sure we'll hear about its possibilities

Perhaps by sending via email to all former EHRI fellows and others who have indicated interest in a short (one page) flyer detailing exactly what the EHRI offers and how these can be accessed online and in person.

More short information on what is available. Sometimes it is hard to follow the developments

Not sure as I wasn't sure these services existed. Maybe monthly mails out to alert researchers to what is out there.

Some newsletter about offers for fellowships, grants, courses and so one.

2) Access

Make as much available online

More collections that are available fully online

By offering researchers (ideally free) access to online material from various European countries

Expand even further collaboration with different archives in collecting available data and providing information and available online sources

Archival Documents are very important

Online Access to archival resources in the Balkans

3) Networking

Network with Researchers from your field

Linking Researchers

Creation of some sort of online community for the participants and people of interest

Some private forum to ask a question or discuss a topic or share experience

PhD students research groups under EHRI supervision

A group email of holocaust researchers to ask questions and receive feedback

Some kind of (maybe online) networking would be nice

By giving the possibility to enlarge the network of researchers working on the same topics by personal contact of organizing lectures discussions (online is efficient to avoid travel costs)

6. Conclusions on EHRI Services and User Community

This deliverable has summarized the participant profiles of past EHRI services and analyzed responses from a survey sent to partner institutions to first identify and define EHRI'S potential user community which is depicted in the table below:

Academic Researchers
Collection Holders
Digital Humanist Experts
Media Professionals
Educators
General Public

A survey distributed widely among various user groups dispersed geographically has helped us in assessing the needs of our user community in terms of services, access and training. The survey had a good response rate and can provide us with an indication of the needs of current and potential future users of EHRI services. The results of the survey have shown that the questions relating to access are important overall in various user groups. The possibility to access descriptions of archival material as well as access to archival material itself are important for users of various backgrounds and disciplines. The services provided by EHRI both online and physically were established to help researchers overcome the challenges associated with dispersed archival sources and facilitate research on the Holocaust. EHRI services will continue to facilitate the work of professionals in the field of the Holocaust.

The survey has shown that the services provided by EHRI are being used by the current user community and are of interest for potential future users. The survey also revealed that the majority of respondents are looking forward to a return to physical meetings.

Moreover, the data on use of the online services have shown significant growth for all services provided. As has been presented, EHRI users of online services are predominantly located in Western Europe and North America. Through the physical services offered, EHRI has reached out more specifically to participants from Eastern and Southern Europe. A continued effort to promote the online services to other geographic locations should continue within EHRI.

While overall the survey has affirmed that the existing services provided by EHRI answer the needs of the user community, several ways the services offered could be refined were revealed. Some of the suggestions that were made in the survey will be addressed either in EHRI PP or EHRI 3:

- The request for more concise information on EHRI services that was expressed in the survey responses, is being addressed within EHRI PP, T5.4 Develop an EHRI service registry.

- The question relating to networking and long-term connections with fellow peers is also being addressed within EHRI PP- T6.3 Facilitate the sustainable engagement of EHRI-users/researchers
- Regarding access to more online descriptions, the Online Portal includes 325,508 archival descriptions. Work is being done now in EHRI 3, WP11 to reach out to more archives, specifically micro-archives to increase the availability of descriptions.

Additional recommendations:

- Continued efforts to reach out to users in countries where there is less use of the online services.
- The increased interest in names searches/genealogy can be addressed by EHRI in different ways: Easy identification of names databases in the EHRI Portal, Seminars/Workshops that deal with the topic, training seminars for reference workers with a focus on family research at EHRI partner institutions that specialize in name search.
- The high percentage of respondents who considered the role of the archivist as important to their work should also lead us to consider the continued physical access programs, as a crucial component of EHRI's activity.
- As for access to online material, this is and will continue to be a request from users, there are privacy issues to consider and the publication of documents themselves have certain constraints. An increasing number of archives are uploading documents to their websites, a direct link from the portal to the archive's documents site could prove helpful for the users.
- Interest in Online Courses on the Holocaust was high among respondents varying in professional background and level of education. Also apparent in the survey was the preference for courses on specific topics relating to the Holocaust. The development of specific courses catered to the different user groups would be valuable.
- To find ways to reach out to additional identified user groups, such as educators, M.A. research students, media professionals, to promote our existing services among these groups and consider specific services that could cater to these user communities.
- Considering the importance attributed by users to the physical/in person meetings, as expressed with the results of the survey to users, EHRI should continue to offer services that are in person.

7. Annex

Invitation letter for taking part in the "User Needs and Research innovation Survey"



Dear EHRI-survey participant,

The following survey has been developed in close cooperation between two work packages of the current Preparatory Phase of the European Holocaust Research Infrastructure (EHRI-PP): one focusing on "User, access and training strategy" (WP5), the other on "Research and Innovation strategy" (WP6). To develop these strategies, a first step will be to assess the current situation at EHRI partner institutions in regard to access, training and content. This will inform our plans for training in research within a sustainable Infrastructure. Participation in the survey is on a voluntary basis. The information collected from the survey will be used to draft two separate deliverables, one dealing with research and innovation strategy and the other dealing with access, training, and content.

The survey is divided in three parts: 1st, as for general information, we want to learn more about you and your institution. We hope this survey will be distributed widely within your institution, since we are particularly interested in different perspectives (for example, insight from various departments and positions held at the EHRI partner institutions). A Second part focusses on content-related questions which should provide insights into research trends and gaps and will inform EHRI's long-term scientific case and vision. The 3rd part addresses the profile of your institution's users, as well as the current access policies and various services provided by each institution.

We look forward to your input and suggestions. We are aware this survey spans many topics and certain questions may not correspond to your specific field of expertise. We encourage you to answer to the best of your ability, however if you are unsure of the answer feel free to leave it out. We also understand some may want to take their time and come back to the survey at their convenience. There are two ways to fill out the survey and both allow to save drafts and continue at one's own ease:

If you follow this link <https://form.jotform.com/202213501973042>, you will get access to the online form. On the bottom of the survey, you can save the changes made so you do not have to finish the survey in one sitting. (Jotform is in compliance with GDPR, more information can be found here: <https://www.jotform.com/gdpr-compliance/>)

If you prefer to fill out the survey and save it to your desktop, the survey is also available as a PDF. If you chose to fill out the PDF, please sent the form back to the EHRI coordinator at your institution (i. e. the person you received this survey from). She/he will forward it to us anonymously

All surveys should be submitted by **15 October 2020** at the latest.

If you have questions, please email Dr. Anna Ullrich ullrich@ifz-muenchen.de or Emmanuelle Moscovitz Emmanuelle.moscovitz@yadvashem.org.il

Invitation letter for taking part in the "User, Access and Training Strategies Survey"



Over the years EHRI has developed a broad range of services which have been delivered to a growing number of users of different backgrounds and disciplines. These services include those accessible online such as the Online Portal, the Documents Blog, The Online Editions, and Online Courses. In addition, various training services have been provided, and include a Fellowship program, Workshops, Seminars and Conferences.

As we prepare to transform the EHRI project into a permanent research infrastructure, in the EHRI preparatory phase (2019-2022), we aim to assess whether the existing EHRI services fulfill the current and future needs of EHRI's user community. For this purpose, we have prepared a survey intended for current and potential future users of various EHRI services. The **"EHRI Survey: User, Access and Training Strategies"** has been prepared on an online platform through SurveyMonkey. The survey will be conducted anonymously and should take approximately 15-20 minutes to fill. The survey will be open until March 5, 2021.

The survey consists of three parts: In the first part – 'General Information' – we hope to learn more about the respondents, specifically their disciplinary and professional backgrounds. The second part of the survey deals with Access Provisions, where we aim to gain a better understanding of the expectations of EHRI users relating to these provisions. Finally, in the third part of the survey – EHRI Services – we wish to learn about use of various EHRI services, and user expectations in terms of services provided.

We encourage readers to fill out the survey and to feel free to distribute it widely among their peers. The invaluable input of EHRI users will enable us to develop and to refine our services to suit the needs of our growing user community.

This following survey spans many topics and certain questions may not correspond to your specific field. We encourage you to answer to the best of your ability, however if you are unsure or a question does not relate to you directly, questions may be left blank.

<https://www.surveymonkey.com/r/J5FF8PV>

For any further questions, please feel free to contact Emmanuelle [Moscovitz](mailto:Emmanuelle.moscovitz@yadvashem.org.il), Emmanuelle.moscovitz@yadvashem.org.il.