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Deliverable 4.1

User Engagement Guidelines

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Abstract (for dissemination)	With EHRI now officially established as a permanent infrastructure in the form of a distributed European Research Infrastructure Consortium (ERIC), developing guidelines for coordinating, planning, delivering, and evaluating EHRI user engagement events is a necessary step. This deliverable will focus on creating these guidelines to ensure consistency and effectiveness in planning, delivering and evaluating EHRI user engagement events both centrally and on the national level.

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1. Introduction

Since its establishment, EHRI has fostered transnational research on the Holocaust by addressing the challenges of dispersed archives and fragmented expertise worldwide. Through its past integrating activities, EHRI has developed a wide array of services that have been and continue to be delivered to an expanding user base. These services can be categorized into two main types. First, physical access services include training programs such as workshops, seminars, and conferences. A transnational access program also offers fellowships to researchers at EHRI's partner institutions. Second, a growing number of online services have been created, including the EHRI Portal, the EHRI Document Blog, EHRI Online Editions, EHRI Self-Guided Online Courses, a MOOC, EHRI Podcast, and the Geospatial Repository.

While EHRI offers a wide range of both in person and digital services, this deliverable will focus specifically on those activities that require participants to register, including all in-person services, such as fellowships, workshops, seminars and conferences, and some online services such as webinars. As EHRI has been officially established as a permanent infrastructure in the form of a distributed European Research Infrastructure Consortium (ERIC), the development of guidelines for coordinating, planning, delivering and evaluating EHRI user engagement events is a necessary step and will be the focus of this deliverable.

2. EHRI-ERIC as a Distributed Research Infrastructure

EHRI was officially launched as an ERIC in January 2025. What started out as a project of four years in 2010, has matured into a permanent European infrastructure for Holocaust research with its own legal identity and long-term funding streams. This permanent organisation has taken the form of a European Research Infrastructure Consortium (ERIC). An ERIC is a full juridical person under European Union Law with the objective of establishing and operating a research infrastructure of trans-national importance. EHRI-ERIC operates as a distributed organisation, consisting of a coordinating Central Hub and linked National Nodes that integrate partner organisations in all member countries. The EHRI-ERIC has been established with ten founding member countries: Austria, Croatia, Czechia, Germany, Israel, Poland, Romania, Slovakia, the Netherlands, and the United Kingdom with Belgium expected to join soon as well as several other countries working towards membership. The integrated RIs consist of the major Holocaust archives, libraries, museums, memorial sites and research institutions that constitute the main centers of excellence in Holocaust research and documentation within the member countries.

The EHRI Central Hub thus establishes a pan-European structure across these existing RIs to develop unified services, realise synergies, promote trans-national and inter-disciplinary exchange and innovation and maximise the impact at a European level. The National Nodes will help advance EHRI's mission on a national level; each node will contribute to transnational activities coordinated by the Central Hub while simultaneously establishing EHRI national activities of their own. The National Node may offer user engagement events nationally, such as conferences, workshops, seminars as well as national fellowship opportunities. As EHRI is now established as a permanent research infrastructure with a growing network of National Nodes, guidelines for user engagement services are crucial to ensure consistency in data collection methods and the organization and dissemination of such events. These guidelines will promote efficient and effective operations across the network.

3. EHRI User Engagement Events

In the realm of User Engagement Events, we consider two distinct types: The first are event-based ad-hoc activities, which can include conferences, methodological seminars, and workshops. These events enable users at different career stages to expand their networks, to acquire the skills they need to excel in the digital world, and to enable new interdisciplinary, trans-national and other innovative research avenues. These events are mainly held in person but can also be offered online.

In addition, a central in-person service offered by EHRI is The Conny-Kristel Fellowship programme which grants researchers and archivists' physical trans-national access to many of the most important collection-holding institutions and centres of excellence in the domain. The fellowships are not ad-hoc but continuously provided services within EHRI. However, considering that the fellowships are offered centrally through the distributed National Nodes, and that certain National Nodes may have their own EHRI fellowships, the need to coordinate these offerings is vital. While the fellowships are primarily intended for in-person participation, off-site access may be granted in exceptional cases where a participant is unable to travel and the host institution can accommodate remote access.

4. Keeping EHRI Users Engaged

During the EHRI Preparatory Phase (2019-2023), an action plan for maintaining user engagement was developed based on existing practices from the EHRI 1, EHRI 2 and EHRI 3 projects, and a review of best practices from other institutions. Additionally, an EHRI User

Advisory Board (UAB), established in 2022, has helped to provide insights on fostering long-term connections between EHRI and its users. The UAB has currently 14 members and includes Holocaust researchers, digital humanists, collection holders, educators and media professionals from Austria, Canada, Croatia, France, Hungary, Israel, Latvia, Netherlands, Poland, Romania, and the US. The UAB has met once during the EHRI Preparatory Phase (December 2022) and once during the Implementation Phase (November 2024). Both meetings proved helpful in gaining a user perspective on different EHRI services. At least one additional meeting will be scheduled during the Implementation phase, with a key agenda item dedicated to discussing the most effective ways to capture and register user impact and output within EHRI. This meeting will also serve as an opportunity to gather feedback on the best approaches for engaging users and providing feedback on short and long-term benefits of EHRI services.

The UAB will continue to be convened as necessary within the EHRI-ERIC infrastructure and will be coordinated through the Central Hub. Requests for feedback from the UAB can be made at both Central Hub and National Node level and will be coordinated by the Central Hub.

The recommendations for sustained engagement, outlined in DL 6.3: How to Keep EHRI Users Engaged[1], included:

1. Appointing a dedicated staff member responsible for user engagement

The staffing plan for EHRI-ERIC's Central Hub foresees a position with a remit for user engagement.

2. Establishing Focus groups and Alumni Networks

Within the EHRI-3 project two focus groups were established, bringing together 26 Holocaust photograph specialists from 12 different countries, and 34 Holocaust reference and information archivists from 19 different countries. With a combined total of 25 Zoom sessions and 3 in-person workshops (one of them a joint gathering of both groups), these groups fostered valuable connections among professionals with shared interest and enhanced their engagement with EHRI.[2]

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[1] DL 6.3 Action Plan for Keeping EHRI User's Engaged, March 2022. https://www.ehri-project.eu/wp-content/uploads/2022/09/D6.3-Action-plan-for-keeping-EHRI-users-connected.pdf.
[2] D4.3 Interim report on developing an international community of experts in preserving, mapping, cataloguing and curating Holocaust collections and linked data.

The advantages of establishing alumni groups was also brought up during the UAB meeting in November 2024 where it was suggested that informal webinars with fellows at the end of the year could help with user engagement by ensuring a continued dialogue.

Within EHRI-ERIC, the continued use of Focus groups and Alumni networks will enhance user engagement as well as networking possibilities among users.

3. Encouraging researchers to acknowledge EHRI in their publications.

EHRI's Access Policy states that all Conny Kristel Fellows are required to inform EHRI about any research output enabled through the fellowship and to duly acknowledge EHRI therein. Multi-lingual guidelines on how to acknowledge EHRI will be made available to users. EHRI users are also encouraged to deposit such outputs in the EHRI Open Access publication repository[3] or in any other public Open Access repository, and/or in public Open Research Data repositories that conform to the FAIR principles. Discussions with the UAB during the Implementation Phase will further develop best ways to gather user output.

4. Encouraging Alumni Contributions to the EHRI Blog and Newsletter

The opportunity to contribute to the EHRI Blog or newsletter offers alumni a valuable platform to share their research insights, accomplishments, and perspectives. This helps foster user engagement and enriches the content available to a wide EHRI network and has been piloted within EHRI-3.

Building on these recommendations, EHRI-ERIC will continue to enhance its engagement strategies.

5. Planning, Delivering and Evaluating EHRI Engagement Events

As EHRI-ERIC continues to expand with an increasing number of services and users, both centrally provided and through National Nodes, a set of comprehensive guidelines establishing criteria for EHRI events—from planning and delivery to evaluation—will provide a clear overview of the user journey and support a thorough assessment of the overall effectiveness of the process. The term "event" will be used here to encompass the various forms of engagement, which can later be distinguished based on the specific activity pursued. These guidelines will:

● Ensure a consistent EHRI identity and event delivery.

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[3] https://hal.science/EHRI

- Support EHRI-ERIC in assessing the quality and effectiveness of its events, enabling continuous improvement.
- Facilitate EHRI-ERIC's follow-up with users.
- Capture valuable data on outputs and outcomes to assess broader impact.

Registration/applications and feedback forms that have been used for Seminars and Fellowship applications during the EHRI project phases can be found in the Annex of this deliverable. These can be used as best practice examples for the future planning, delivery and evaluation of EHRI-ERIC events.

5.1 Promotion

The dissemination strategy for user engagements events will vary depending on the event's nature and target audience. EHRI's project website and social media platforms will be utilized, supplemented by targeted outreach to specific user groups. This targeted approach may include announcements through partner networks, collaborations with relevant organizations to maximize reach and engagement within the specific community of interest. For events run nationally, the National Nodes will use their distinct websites and social media platforms to disseminate, and will be encouraged to use central EHRI platforms when appropriate.

5.2 Application and Registration

In-person EHRI engagement events usually require an excellence-based application process. The EHRI Access Policy provides a process for this selection that can serve as a guidance for National Nodes.[4] Where no application is needed, registration is still required for all EHRI events, whether on the national or central level, to gather valuable data on users to inform EHRI's performance monitoring and impact assessment. EHRI will comply with GDPR data regulations. Data to be gathered include:

- Country of Birth
- Citizenship
- Location of Residence
- Gender
- Date of Birth
- Institutional Affiliation

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[4] D5.2 User Strategy and Access Policy, https://www.ehri-project.eu/wp-content/uploads/2022/09/D5.2-User-Stategy-and-Access-Policies.pdf

- Role within the Institution

- Research field (If applicable)

- Academic Credentials

- Prior participation at EHRI events to EHRI

- How participants learned about the event

To inform the evaluation and follow-up process as outlined under 5.4, organisers are encouraged to ask questions that will ascertain the levels of skills and knowledge of users and their learning expectations. Such questions could be as follows:

- On a scale of 0-10, what is your knowledge about the <<topic of event>>?
- What do you expect to learn from the event?

5.3 Delivery

When delivering an EHRI event, certain elements must be included to ensure consistency and alignment with EHRI standards. Organisers will be expected to adhere to the EHRI Style Guide and will have access to a toolkit containing EHRI branded material, e.g., presentation templates and promotional materials. In addition, organisers will need to have an attendance register that monitors take up of the event by registered participants. Certain EHRI events also require specific content: For example, EHRI Seminars should always begin with an introduction to EHRI and its central services and activities.[5]

5.4 Evaluation and Follow-up

Evaluation and follow-up of activities, such as Fellowships, Seminars, and Workshops, should measure both the quality of the event and capture outcome data (*immediate benefits from the activity*) as well as impact data (*long-term benefits)*. Organisers are encouraged to survey users at the point of registration/application (see 5.2) to ascertain their learning expectations and evaluate outcomes. The following steps should be followed:

1. Immediately after the event – to gather initial feedback on user satisfaction and on whether user expectations have been met

2. 6 to 18 months later – to assess the event's longer-term impact on participants' research and professional development.

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[5] D5.3 Final evaluation report seminars https://www.ehri-project.eu/wp-content/uploads/2025/01/D5.3-Final-evaluation-report-seminars.pdf

The immediate post-event evaluation should collect key data, including:

- Overall satisfaction with the quality of the event (scaling, 0-10)
- Recommendations for improvement (open question soliciting e.g. what was missing)
- Testimony on key benefits of the event (open question incl. permission to publish it in EHRI communications)
- Likelihood of participating in future EHRI events (scaling 0-10)

If organisers surveyed participants' learning expectations at the point of application/registration, the following questions should be asked to evaluate outcomes:

- On a scale of 0-10, what is your knowledge about the <<topic of event>> after the event?
- On a scale of 0-10, how much did the event meet your expectations?

The follow-up evaluation (after 6-18 months) will measure the lasting impact of the EHRI event on participants' research and professional outcomes. These evaluations can pertain to ad-hoc activities such as workshops, seminars, and participation in the Conny Kristel Fellowship. Below are some guiding questions for such evaluations.

- What outputs (publications, presentations, reports, etc.) have you produced as a result of your participation in the event?
- Can you describe any projects or initiatives that were directly influenced by your participation in the event?
- How has the event contributed to your professional growth in the past year?
- How have you used what you learned at the event in your work?
- Have you maintained connections with fellow participants, mentors, or other professionals you met during the event? If so, in what ways?

This dual-evaluation approach will provide EHRI with both real-time feedback and insights into the event's long-term effectiveness.

5.5 Post-Event Communication

To promote EHRI events in general, attract future users and increase the visibility of EHRI nationally and internationally, event organisers should write about the event after its delivery. This should be in line with the scale and scope of the event and disseminated as appropriate either via the main EHRI website and/or via national websites as well as via social media channels.

For National Nodes, information about services conducted at the national level can be shared through a service registry form, which currently serves to collect basic details on activities across various National Nodes. To capture more detailed output and outcome data, a structured system will be implemented to ensure that national-level event data—including information in local languages—is effectively transmitted to the EHRI Central Hub via the National Coordinators Committee.

6. Annex: Forms

6.1 EHRI Seminar Application Form

EHRI Seminar
Application Form

Personal Data

O Prof.   O Dr.   O Mr.   O Ms. O Mx. (Please <mark>highlight</mark> the appropriate box)

Gender: O Male   O Female   O Other (Please <mark>highlight</mark> the appropriate box)

Last name:	
First name:	
Country of Birth:	
Date of Birth:	
Country of Citizenship:	

Home Address			
Street:		Number:	
Postal Code:	City:		
State / Country:			
Telephone:			
E-mail Address:			

Professional Data

Name of Institutional Affiliation:	
Current Position:	
Address of Institution:	

Academic Credentials (include PhD program information if applicable)

Degree:		Subject area:	
Date:		Institution:	
Degree:		Subject area:	
Date:		Institution	
Degree:		Subject area:	
Date:		Institution:	

Languages: Please list languages you speak/read and state level by number: 1. Fair 2. Well 3. Very Well 4. Fluent, and Read/Lecture/Converse		
Language:	Level:	Read/Lecture/Converse:
1.		
2.		
3.		
4.		

What are your expectations for attending the Seminar?

Is there anything relevant you want to add?

If you are interested to be kept up-to-date on EHRI's activities and receive information about upcoming events via our newsletter and email, please tick this box O

6.2 EHRI Events Evaluation Form

EHRI Events Evaluation Form

Event:

Dates of Event:

Location:

Name Participant:

Nationality:

Occupation/Job Title:

Email address:

☐ I don't want my name and email address added to the EHRI Mailing List. (Please tick the box if this applies to you.)

We use the mailing list for sending the EHRI Newsletters or updates about events.

How did you learn about this event?

Why did you go to his event? What were your expectations?

Did the event meet with your expectations?

Which parts of the event did you like best – and why?

Which aspects of the event could be improved – and how?

Could you give us a quote about the event?

Do you give EHRI permission to use this quote on our website, social media or other publications?

Do you have any other comments for EHRI?

Thank you!

6.3 EHRI Fellowship Evaluation Form

GETTING INFORMATION

1. How did you hear about Conny Kristel Fellowship program?

    More than one answer may apply.

EHRI's website	
EHRI's Newsletter	
Peer/Colleague	
Social media	
Other	

2. How do you consider the amount of information which was available to you regarding the Fellowship program?

    Please rate it on the scale bellow - 1 (appalling) -10 (perfect)

1	2	3	4	5	6	7	8	9	10

3. Did you find any information to be missing in the material communicated about the Fellowship Program?

YES	
NO	

If YES:

> 3.1. What kind of information was missing?

> _____

> 3.2. Did you use other means to gather the information which you found to be lacking, e.g. by getting in touch with the coordinator of the Fellowship Program?

YES	
NO	

> 3.3. Was your inquiry successful?

YES	
NO	

4. Do you have any suggestions or recommendations which could improve the way in which EHRI reached out to (potential) fellows?

_____

APPLICATION PROCEDURE

1. How do you judge the ease to apply for the EHRI Conny Kristel Fellowship Program?

   Please rate it on the scale bellow - 1 (appalling) -10 (perfect)

1	2	3	4	5	6	7	8	9	10

2. How do you judge the clarity of the selection criteria for being granted the fellowship (e.g. letter of recommendation, research project etc.)?

   Please rate it on the scale bellow - 1 (appalling) -10 (perfect)

1	2	3	4	5	6	7	8	9	10

3. How do you judge the time it took for EHRI to consider your application?

   Please rate it on the scale bellow - 1 (appalling) -10 (perfect)

1	2	3	4	5	6	7	8	9	10

4. How do you judge the general communication during the selection process?

   Please rate it on the scale bellow - 1 (appalling) -10 (perfect)

1	2	3	4	5	6	7	8	9	10

5. How do you judge the communication about the results and next steps?

   Please rate it on the scale bellow - 1 (appalling) -10 (perfect)

1	2	3	4	5	6	7	8	9	10

6. Do you have additional comments or recommendations regarding the application procedure from your personal experience?

_____

VISIT

1. How do you rate the practical on-site support by staff (logistics, procedures etc.)?

   Please rate it on the scale bellow - 1 (appalling) -10 (perfect)

1	2	3	4	5	6	7	8	9	10

2. How do you rate the scientific support from on-site specialists in the field?

   Please rate it on the scale bellow - 1 (appalling) -10 (perfect)

1	2	3	4	5	6	7	8	9	10

3. How helpful was for your research project the possibility offered by EHRI to combine various institutions in one fellowship?

Not at all helpful	
Slightly helpful	
Somewhat helpful	
Very helpful	
Extremely helpful	
It was not the case	

4. How helpful was for your research project the possibility offered by EHRI to choose the length of your stay (from one to six weeks)?

Not at all helpful	
Slightly helpful	
Somewhat helpful	
Very helpful	

Extremely helpful	

5. Taking everything into account, how do you reflect on your visit during the EHRI Conny Kristel Fellowship?

Please rate it on the scale bellow - 1 (appalling) -10 (perfect)

1	2	3	4	5	6	7	8	9	10

6. Do you have additional comments or recommendations regarding the visiting of the EHRI partner(s) from your personal experience?

_____

Thank you so much!!!!

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