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Building Expertise From Within: One Department's Look at New Ways to Cultivate Cataloging Knowledge for their Staff

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Building Expertise From Within

One department’s look at new ways to cultivate cataloging knowledge for their staff

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USU Cataloging and Metadata Services Unit

- 4.75 FTE professional catalogers, 3 FTE paraprofessional cataloging assistants, & 1 unit head

- Cooperative department – give same opportunities to professional and paraprofessional

- Non-Union, no hard and fast rules for job duties

- Loss of staff, need for cross-training, creative approach to meet new challenges
Assessment Process: Department Meeting

- Met together with entire unit
  - Professional and para-professional

- Reviewed Core Competencies for Cataloging and Metadata

- Professional Librarians

- Discussion of current skills and expertise as well as future needs to
  - Complete our current work
  - Automate current processes
  - Stay current with emerging trends in the field
  - Raise awareness of how changes were adopted by other libraries/vendors
Assessment Process: Whiteboard brainstorming

- Created a framework for needed skills
- Left whiteboard out for two week
- Allowed staff to research and think about skills and contribute ideas anonymously
Assessment Process: Department meeting, take 2

Reconvened to discuss whiteboard results in relation to the Core Competencies framework

1) Knowledge competencies
2) Skill & ability competencies
3) Behavioral competencies
Knowledge Competencies

- According to framework
  - Principles
  - Systems
  - Trends

- USU identified “Knowledge Competencies” needing emphasis
  - Principles: XML, BIBFRAME, RDA
  - Systems: MarcEdit, OpenRefine, oXygen XML editor
  - Trends: linked data
Assessment Process: Department meeting, take 2

Skill & Ability Competencies

- According to framework
  - Application of standards, conceptual models and principles within a bibliographic system
  - Application of universal standards within a local context
  - Integration, mapping, and transformation of metadata within a bibliographic system

- USU identified “Skill & Ability Competencies”
  - Application of standards: RDA authority control, Machine-actionable data
  - Local Context: procedure documentation, designing workflow processes
  - Metadata manipulation: cross-walking, normalization
Assessment Process: Department meeting, take 2

Behavioral Competencies

- According to framework include
  - Interpersonal Communication
  - Public service orientation
  - Initiative & adaptability
  - Professional curiosity
  - Problem solving

- USU
  - Currently being handled by library-wide Staff Development and Engagement Committee
Process: Responsibilities

- Volunteer basis, taking into account:
  - Existing skill level
  - Interest/Comfort
  - Workload
- Available to all unit employees
- Prioritized issues that were important to the library
Split into two kinds of responsibilities:

- **Specialties = Standards competencies**
- **Technical = Systems competencies + Skills and Abilities competencies**

### Specialties (sub-categories) and Assigned

<table>
<thead>
<tr>
<th>Specialties (sub-categories)</th>
<th>Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authority Control (MARC)</td>
<td>Mavis</td>
</tr>
<tr>
<td>Authority Control (DC)</td>
<td>Liz</td>
</tr>
<tr>
<td>BIBFRAME</td>
<td>Melanie</td>
</tr>
<tr>
<td>Encoded Archival Description (EAD)</td>
<td>Andrea, Anna</td>
</tr>
<tr>
<td>Encoded Archival Context (EAC-CPF)</td>
<td>Becky</td>
</tr>
<tr>
<td>Linked Data</td>
<td></td>
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<tr>
<td>*Authority control (MARC)</td>
<td>Mavis</td>
</tr>
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<td>*Authority control (DC)</td>
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<tr>
<td>*BIBFRAME</td>
<td>Melanie</td>
</tr>
<tr>
<td>*PREMIS</td>
<td>Becky</td>
</tr>
<tr>
<td>*RDA/RDF</td>
<td>Melanie</td>
</tr>
<tr>
<td>*Research Data</td>
<td>Andrea</td>
</tr>
<tr>
<td>Schema.org</td>
<td>Kurt</td>
</tr>
<tr>
<td>Vendor efforts for Linked Data</td>
<td>Kurt</td>
</tr>
<tr>
<td>PREMIS</td>
<td>Becky</td>
</tr>
<tr>
<td>RDA</td>
<td>Melanie**</td>
</tr>
<tr>
<td>Research Data Cataloging</td>
<td>Andrea</td>
</tr>
<tr>
<td>Rights Management</td>
<td>Spencer</td>
</tr>
</tbody>
</table>
Process: Responsibilities

Split into two kinds of responsibilities:

- Specialties = Standards competencies
- Technical = Systems competencies + Skills and Abilities competencies

<table>
<thead>
<tr>
<th>Technical Competencies</th>
<th>Assigned group</th>
</tr>
</thead>
<tbody>
<tr>
<td>MarcEdit</td>
<td>Andrea</td>
</tr>
<tr>
<td></td>
<td>Kurt</td>
</tr>
<tr>
<td></td>
<td>Liz</td>
</tr>
<tr>
<td></td>
<td>Melanie</td>
</tr>
<tr>
<td></td>
<td>Seth</td>
</tr>
<tr>
<td>OpenRefine</td>
<td>Andrea</td>
</tr>
<tr>
<td></td>
<td>Anna</td>
</tr>
<tr>
<td></td>
<td>Liz</td>
</tr>
<tr>
<td>XML/XSLT</td>
<td>Liz</td>
</tr>
<tr>
<td></td>
<td>Andrea</td>
</tr>
<tr>
<td></td>
<td>Anna</td>
</tr>
</tbody>
</table>
Process: Responsibilities

- Responsible parties agreed to:
  - Seek out professional development opportunities
  - Train the rest of the unit
  - Advise the unit on any application for the skills
  - For technical competencies, find concrete applications of technical skills
Implementation

- Lunch Time Discussion Groups
  - No set time - takes place as needed
  - Called by “specialist”
  - Material distributed 1-2 weeks prior
  - Environment kept light
  - Invite administration or outside library colleagues, as needed
Implementation

- OpenRefine Training
- Data Carpentry
- Function-based training
  - Implemented new batch editing process for music uniform headings
Implementation

- **XML Group – 2018, Year of XML**
- Learns XML
- Incorporates key pieces of learning into workflows
- Teach rest of staff (including assistant, professionals):
  - How to complete the workflows
  - Any underlying foundational concepts needed
- Conducts a monthly training – including non-CMS staff
## Goal Setting

<table>
<thead>
<tr>
<th>Goal</th>
<th>Activity</th>
<th>Lead</th>
<th>Team Members</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal #1:</strong> Simplify and increase efficiency of database maintenance and correction</td>
<td>Activity #1: Streamline metadata procedures and create a comprehensive application profile for digital collections</td>
<td>Andrea</td>
<td>• Anna • Seth • Liz</td>
</tr>
<tr>
<td><strong>Goal #2:</strong> Increase visibility and outreach of cataloging and metadata workflows and impact</td>
<td>Activity #1: Conduct workshops with other departments, such as Table Talks, in order to demonstrate the work or workflows of the unit</td>
<td>Kurt</td>
<td>• Melanie • Barb</td>
</tr>
<tr>
<td><strong>Goal #3:</strong> Contribute to the scholarship and knowledge of the cataloging and metadata field</td>
<td>Activity #1: Publicly share developed procedures and policies with other catalogers and metadata professionals in the field</td>
<td>Becky</td>
<td>• Andrea • Melanie • Liz</td>
</tr>
<tr>
<td><strong>Goal #3:</strong> Contribute to the scholarship and knowledge of the cataloging and metadata field</td>
<td>Activity #2: Create a scholarship interest group to develop collaborative scholarship in the department and increase scholarly publications</td>
<td>Spencer</td>
<td>• Anna • Becky • Kurt</td>
</tr>
<tr>
<td><strong>Goal #4:</strong> Prepare for changing standards in the field and the subsequent impact on workflows, content management systems, and staffing.</td>
<td>Activity #1: Research and train on ways to begin implementing linked data using the systems and technology we have now</td>
<td>Andrea</td>
<td>• Anna • Spencer • Becky</td>
</tr>
<tr>
<td><strong>Goal #4:</strong> Prepare for changing standards in the field and the subsequent impact on workflows, content management systems, and staffing.</td>
<td>Activity #2: Organize a monthly professional development training schedule, emphasizing upcoming standards/issues that will impact cataloging and metadata, including: RDA, FRBR/LRM, PREMIS, Research Data metadata standards, Authority Control., BIBFRAME, EAD3, etc.</td>
<td>Melanie</td>
<td>• Seth • Barb • Kurt</td>
</tr>
<tr>
<td><strong>Goal #5:</strong> Improve turn around time and project goal completion</td>
<td>Activity #1: Improve the average turn around time for material being cataloged in the unit</td>
<td>Liz</td>
<td>• Seth • Spencer • Becky</td>
</tr>
</tbody>
</table>
Cataloging and Metadata Services

Goal and Activity Planning 2017
Team: Melanie, Kurt, Barbara, Seth

Goal number: #4
Goal Statement:
Prepare for changing standards in the field and the subsequent impact on workflows, content management systems, and staffing.
Activity number: #2
Activity Statement:
Organize a regular professional development training schedule, emphasizing upcoming standards/issues that will impact cataloging and metadata, which can include: RDA, FRBR/LRM, PREMIS, Research Data metadata standards, Authority Control, HIBFRAME, EAD3, etc.

Deliverables
Please list what will be done to complete this goal.
- Identify 3 Topics/Issues from Department
  - Cataloging/Metadata tools (esp. OpenRefine, but also MarcEdit, etc.)
  - Data visualization
- Provide at least 1 training for each of the three topics/issues (possibly work w/Goal 2: Activity 1 (lead: Kurt))
- Extra: table talk or poster session or similar outreach to library, to profession, etc. (will work w/G2:A1: Kurt)

Action Plan and Timeline
Please list all steps necessary to complete this goal. Include the time frame of when they will be completed

<table>
<thead>
<tr>
<th>Action Steps</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send out list of possibilities to be read by CMS before the meeting</td>
<td>December 1, 2017</td>
</tr>
<tr>
<td>Information gathering; discuss possibilities at regular December CMS meeting, with vote on three top topics/issues.</td>
<td>December 5, 2017</td>
</tr>
<tr>
<td>Arrange training on first of three topics</td>
<td>By March 2018</td>
</tr>
<tr>
<td>Assess for new training possibilities at unit meeting</td>
<td>June 2018</td>
</tr>
<tr>
<td>Arrange training on second of three topics</td>
<td>By July 2018</td>
</tr>
<tr>
<td>Arrange training on third of three topics</td>
<td>By November 2018</td>
</tr>
</tbody>
</table>

Key Challenges
Please list any problems or issues that will need to be addressed before this goal can be completed.
- May not find useful training or be able to develop our own
- New standard or issue may come up during the year, requiring setting aside one of the chosen topics
- Scheduling issues
Assessment

- **Annual Unit Report**
  - Goal teams and specialty/technical leads

- **Annual Evaluation and Discussion**
  - Emerging technologies and standards to consider
  - Obsolete technologies and standards to discontinue
  - Effectiveness

- **Yearly review/evaluation**
  - Performance evaluations for accountability and to assess that they are reaching toward Core Competencies
  - View for work plan to make sure it is not overwhelming
Reflections

What would we do differently
- More documentation
- Explaining our process outside of CMS better

What we felt had biggest impact or went well
- Organized way to approach professional development makes it more manageable
- Inclusion of everyone, particularly in teams, helps create comradery and collaboration
- Influenced the goals we set as a unit
- Demonstrated to administration that we were actively pursuing professional development and could handle new and emerging issues
References

Questions?

Contact Information

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