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Transitioning Technical Services: Training Staff to Meet Evolving Needs

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June 25, 2017

ALA*Annual*
CHICAGO
CONFERENCE & EXHIBITION JUNE 22–27, 2017

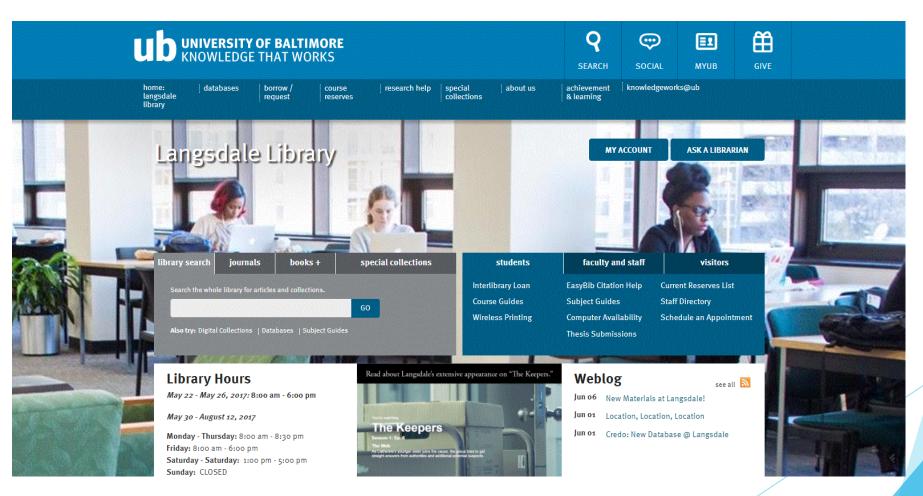# Transitioning Technical Services: Training Staff to Meet Evolving Needs

The University of Baltimore Experience

Maggie Dull – Metadata and Digital Curation Librarian

Overview

- Case Study: The University of Baltimore's Langsdale Library.
  - Moving from Print to Electronic Theses and Dissertations.
  - *Preserve the Baltimore Uprising* Email Collection.

University of Baltimore's Langsdale Library

New Roles and New Projects

- Hired as the Cataloging and Metadata Librarian in July 2015.
  - Member of Acquisitions and Discovery Services, which included the Department Head, Electronic Resources Librarian, and 1.5 paraprofessionals.

- Transitioned to Metadata and Digital Curation Librarian in February 2017.
  - Member of Special Collections, which includes Head of Special Collections, Archivist, and 2 paraprofessionals.

New Projects, New Skills?

- Challenges:
  - Different skills and different tasks across different departments.
  - Re-fitting skills for new tools and new standards.
  - Different learning types, different comfort zones.

- Solutions:
  - Communication.
  - Documentation.
  - Iteration.

Moving to ETDs: Basis of the Situation

▶ Prior to Winter 2016, all graduate students were required to deposit two print copies of their thesis or dissertation at Langsdale.

▶ Beginning in 2010, doctoral students were also required to submit their work to ProQuest's Digital Dissertations. Masters students were encouraged to submit, but uptake was limited.

▶ Electronic dissertations were delivered via FTP from ProQuest and manually added to Langsdale's instance of CONTENTdm.

Moving to ETDs: Reasons Why

- A better way to showcase and highlight the work and achievements of our graduate students. Better access for students.

- Langsdale became a member of MDSOAR: Maryland Shared Open Access Repository, which would allow students to easily submit their materials.

- **Simplify the workflow!**

Moving to ETDs: Workflow Challenges

- Too many records, too much duplication of effort across departments.
    - Brief bib record in Aleph by ADS staff.
    - Brief record in CONTENTdm by Special Collections staff.
    - Record in Digital Dissertations by student.
    - Digital Dissertations submission managed by ADS staff.
    - Brief bib overlaid by full cataloging by ADS staff.
    - Subject headings and other information would be manually entered into CONTENTdm by Special Collections staff.

- Managing the materials in CONTENTdm was handled by Special Collections staff in charge of this platform. ADS took over the process, but lack of departmental expertise hindered efforts.

Moving to ETDs: Re-focus and Re-train

▶ Decided to migrate from CONTENTdm into MDSOAR: new interface, fresh start.

▶ New staff in ADS: an opportunity to rebuild the workflow with ongoing feedback from the staff involved.

▶ Desire to eliminate redundant and complicated cross-departmental workflows.

Moving to ETDs: Document, Document…

▶ Reviewed extant documentation (what could be found). Looked for duplication, looked for pain points.

▶ Wrote it all down…

  ▶ Checklists

  ▶ Screenshots

  ▶ Not jus the **how**, but also the **why**

▶ …but also talked it through.

Moving to ETDs: Cataloging vs Metadata

▶ Emphasized that description is description. We are still saying the same things about our theses and dissertations and, in some cases, are able to capture more.

▶ Demystifying Data Dictionaries:

  ▶ Definitions and examples

  ▶ "Cross walking" to MARC

  ▶ Look at both the staff side and the public side

  ▶ Terminology is important, but not the end of the world

▶ Metadata is iterative.

  ▶ The record isn't set in stone. **Mistakes are okay and can be fixed.**

  ▶ It's okay to go back and build on what we've learned.
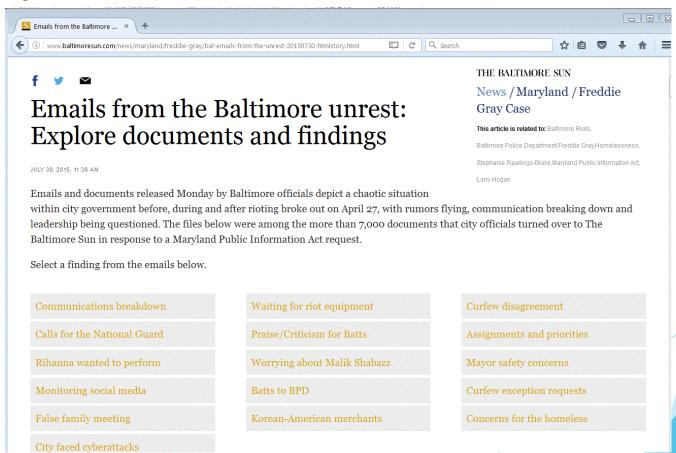
Moving to ETDs: Result

- As of December 2016, all submitted thesis and dissertations are one print/one electronic.

- Complete revamping of workflows and procedures. Before the submission period, meet with staff to run a refresher.

- ADS staff manages this process with little intervention by the Metadata and Digital Curation Librarian.

Preserve The Baltimore Uprising (PBU)

PBU: Basis of the Situation

▶ Joe Tropea from the Maryland Historical Society reached out to Langsdale's Special Collections requesting our help describing a emails released by the City of Baltimore to journalists.

PBU: Challenges

- Over 7000 emails in PDF form were already uploaded as an entire collection into the Omeka interface.

- Descriptions contained only had a title -- numeric file name -- yet **item level** description was desired for each email.

- Special Collections staff were unfamiliar with Omeka, though all were experienced with ArchivesSpace.

PBU: Archival Skills to Metadata Skills

- Special Collections staff were familiar with describing archival materials and collections via ArchivesSpace. Thus they were familiar with *translating skills* from a print finding aid/processing environment into an online information management system.

- Special Collections staff were familiar with reviewing archival documents in order to glean key information that would be of use to researchers. Striking the right *balance in description* – neither too broad nor too narrow – would be key.

PBU: One on One

- After developing a data dictionary, I worked one on one with each staff member.
  - Read first, then try.
  - Jump on in and check back with me later.
  - Wanted a co-pilot.

- Each staff member developed their own workflow, based on what felt comfortable to them.

- Reviewed completed descriptions and offered pointers.

PBU: Result

- As the project has progressed, we've added additional staff (including students) to this project.

- Staff work autonomously, at their own pace.

- Setting the stage for future metadata intensive projects as we develop our digital initiatives.

Questions?

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