

Adventures in ETD metadata wrangling:



METADATA WORKFLOWS FOR A
MASS RETROSPECTIVE
DISSERTATION & THESIS
DIGITIZATION PROJECT
AT THE UNIVERSITY OF
MASSACHUSETTS AMHERST

MEGHAN BANACH BERGIN

ALA MIDWINTER 2016

Dissertation and Thesis Digitization Project Workflow



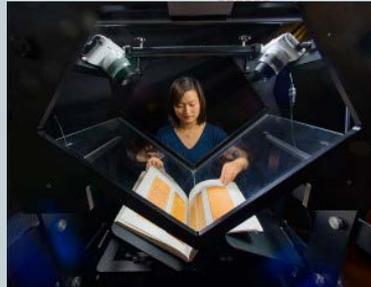
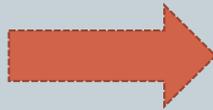
Pre-scanning steps



Dissertation and Thesis Digitization Project Workflow



Scanning and post-scanning steps



MARC Records



[LOCATION & AVAILABILITY](#)

Title [Morphological and ecological studies of the Mexican bean beetle \[electronic resource\].](#)

Author [Sweetman, Harvey Leroy, 1896-](#)

Publisher 1930.

Format E-Thesis
E-Book

Physical Descrip. [iv], 77 p. : ill.

System Details Note Mode of access: World Wide Web. AUM

Note(s) Available online through ScholarWorks@UMass Amherst. AUM

Thesis Note Thesis (Ph.D.)--Massachusetts Agricultural College, 1930.

Additional Form Print copy also available.

Reproduction Note Electronic reproduction. Amherst, Mass. University of Massachusetts Amherst, 2015. Scanned as part of the Retrospective Dissertation/Thesis Digitization Project by the UMass Amherst Libraries. Available in PDF. AUM

Subject(s) [Mexican bean beetle.](#)

Subject(s) [Theses -- Entomology -- Doctoral.](#)

Related Entry Original (OCoLC)14982749

Location(s) [UM Du Bois Library / UM Internet](#)

[LOCATION & AVAILABILITY](#)

[Standard view](#) | [MARC View](#)



Metadata Conversion



Batch Uploading to IR



bpimport_20150811T152628_rev - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J
1	title	fulltext_url	keywords abstract	author1_f	author1_l	author1_i	comment	degree_n	departme	do
126	Fire-resistant polymers containing	http://archive.org/download/fireresistantpoli	Fire resistant polymer	Kenneth A	Ellzey	University of Massac	Thesis (Ph Polymer S	op		
127	Solid phase synthesis of graft cop	http://archive.org/download/solidphasesynti	Graft copolymers, So	David W.	Flanagan	University of Massac	Thesis (Ph Polymer S	op		
128	Solid and melt state processing of	http://archive.org/download/solidmeltstatep	Carbon dioxide, Super	Manuel A.	Garcia-Lei	University of Massac	Thesis (Ph Polymer S	op		
129	Olefin polymerization from single	http://archive.org/download/olefinpolymeriz	Polymerization, Ziegler	Rajeswari	Kasi	University of Massac	Thesis (Ph Polymer S	op		
130	Ultra-thin films of polyvinyl alc	http://archive.org/download/untrathinfilmsof	Aqueous polymeric c	Mikhail,	Kozlov	University of Massac	Thesis (Ph Polymer S	op		
131	Interactions of chiral biopolymers	http://archive.org/download/interactionsofci	Biopolymers, Chirality	Christophe	Stanley	University of Massac	Thesis (Ph Polymer S	op		
132	Recycling thermosets :: the use o	http://archive.org/download/recyclingtherm	Polymer, Thermosetti	Drew E.	Williams	University of Massac	Thesis (Ph Polymer S	op		
133	Surface chemistry of poly (p-xylyl	http://archive.org/download/surfacechemisi	Nylo, Plastic film	Margarita,	Herrera-Al	University of Massac	Thesis (Ph Polymer S	op		
134	Preparation of novel amphiphilic p	http://archive.org/download/preparationofn	Antibacterial agents, I	Mehmet F	Ilker	University of Massac	Thesis (Ph Polymer S	op		
135	A single molecule visualization of	http://archive.org/download/singlemolecul	Diffusion, Visualizatio	Dmytro,	Nykypancl	University of Massac	Thesis (Ph Polymer S	op		
136	Mechanical behavior, modeling, a	http://archive.org/download/mechanicalbeh	Fiber-reinforced plast	Angelo,	Pedicini	University of Massac	Thesis (Ph Polymer S	op		
137	Functionalized quantum dots for d	http://archive.org/download/functionalizedq	Cadmium, Selenides	Habib,	Skaff	University of Massac	Thesis (Ph Polymer S	op		
138	Cationic facially amphiphilic phen	http://archive.org/download/cationicfacially	Biopolymers, Peptide	Lachelle,	Arnt	University of Massac	Thesis (Ph Polymer S	op		
139	Gradient heterogeneous surfaces	http://archive.org/download/gradienthetero	Cell migration, Polym	Irene Y.	Tsai	University of Massac	Thesis (Ph Polymer S	op		
140	Pressure effects on entropically d	http://archive.org/download/pressureeffect	Block copolymer, Ph	Kristopher	Lavery	University of Massac	Thesis (Ph Polymer S	op		
141	Kinetics and morphology of elect	http://archive.org/download/kineticsmorpho	Electrohydrodynamic	Kathryn A	Leach	University of Massac	Thesis (Ph Polymer S	op		
142	Directed self-assembly of nanopa	http://archive.org/download/directedselfass	Liquid-liquid interface	Yao,	Lin	University of Massac	Thesis (Ph Polymer S	op		
143	Monte Carlo, small angle light sca	http://archive.org/download/montecarlo sma	Ligh, PolymerMonte C	Joseph E.	McNamara	University of Massac	Thesis (Ph Polymer S	op		
144	Phase diagrams of stoichiometric	http://archive.org/download/phasediagrams	Polyelectrolyte, Stoi	Michael J.	Leonard	University of Massac	Thesis (Ph Polymer S	op		
145	Towards functional materials from	http://archive.org/download/towardsfunction	Nanostructured mater	Waiken K.	Wong	University of Massac	Thesis (Ph Polymer S	op		
146	Deformation characteristics of the	http://archive.org/download/deformationche	Elastomer, Polystyren	Kishore K.	Indukuri	University of Massac	Thesis (Ph Polymer S	op		
147	Grain growth kinetics in microgra	http://archive.org/download/graingrowthkin	Block copolymers, Ne	Xiaochuan	Hu	University of Massac	Thesis (Ph Polymer S	op		
148	Morphological studies of graft cop	http://archive.org/download/morphologicals	Graft copolymers, Mo	Engin,	Burgaz	University of Massac	Thesis (Ph Polymer S	op		
149	Nickel salicylaldiminato catalysts f	http://archive.org/download/nickelsalicylald	Nickel catalysts, Poly	Pushkala,	Krishnamu	University of Massac	Thesis (Ph Polymer S	op		
150	A thermal approach to the genera	http://archive.org/download/thermalapproac	Block copolymer, The	Julie M.	Leiston-Be	University of Massac	Thesis (Ph Polymer S	op		
151	Continuous carbon nanofibers pr	http://archive.org/download/continuouscart	Carbon fibers, Textile	Sian F.	Fennesse	University of Massac	Thesis (Ph Polymer S	op		
152	Aliphatic polyesters with pendent	http://archive.org/download/aliphaticpolyesi	Aliphatic compounds, Bryan	K.	Parrish	University of Massac	Thesis (Ph Polymer S	op		
153	I. Composite polymer coatings pr	http://archive.org/download/icompositopoly	Atomic force micros	Kevin A.	Wier	University of Massac	Thesis (Ph Polymer S	op		
154	Molecular aspects of yield and fra	http://archive.org/download/molecularaspe	Nanostructured mater	Kevin J.	Calzia	University of Massac	Thesis (Ph Polymer S	op		
155	Transport polymerization for mate	http://archive.org/download/transportpolym	Cyanoacrylate, Thin f	Zhixiang,	Lu	University of Massac	Thesis (Ph Polymer S	op		
156	Solvent enhanced block copolyme	http://archive.org/download/solventenhance	Block copolymers, Sc	Matthew J.	Misner	University of Massac	Thesis (Ph Polymer S	op		
157	Surface modification by adsorptio	http://archive.org/download/surfacemodific	Adsorption, Silane co	Ilke,	Anac	University of Massac	Thesis (Ph Polymer S	op		
158	Catalytic hydrogenation of hetero	http://archive.org/download/catalytichydro	Catalysis, Vinyl polym	Yoko,	Aoyama	University of Massac	Thesis (Ph Polymer S	op		

Batch Set Access Controls



Batch Upload to Digital Commons



Doctoral Dissertations 1896 - February 2014



Manage Dissertations

Upload Dissertation

Usage Reports

Configuration

Mailing Lists

My Account

Dissertations

Batch upload XML

Batch upload Excel

Batch revise Excel

Close ir_etd

Preview site

Update site

Go to site

Preferences

Log out

Administrator report

Batch Upload

To batch upload content via an Excel Spreadsheet:

1. **Download** spreadsheet for *Doctoral Dissertations 1896 - February 2014*
2. **Complete spreadsheet** - contact dc-support@bepress.com or call **510-665-1200 x2** for instructions.
3. **Upload spreadsheet:**

Browse...

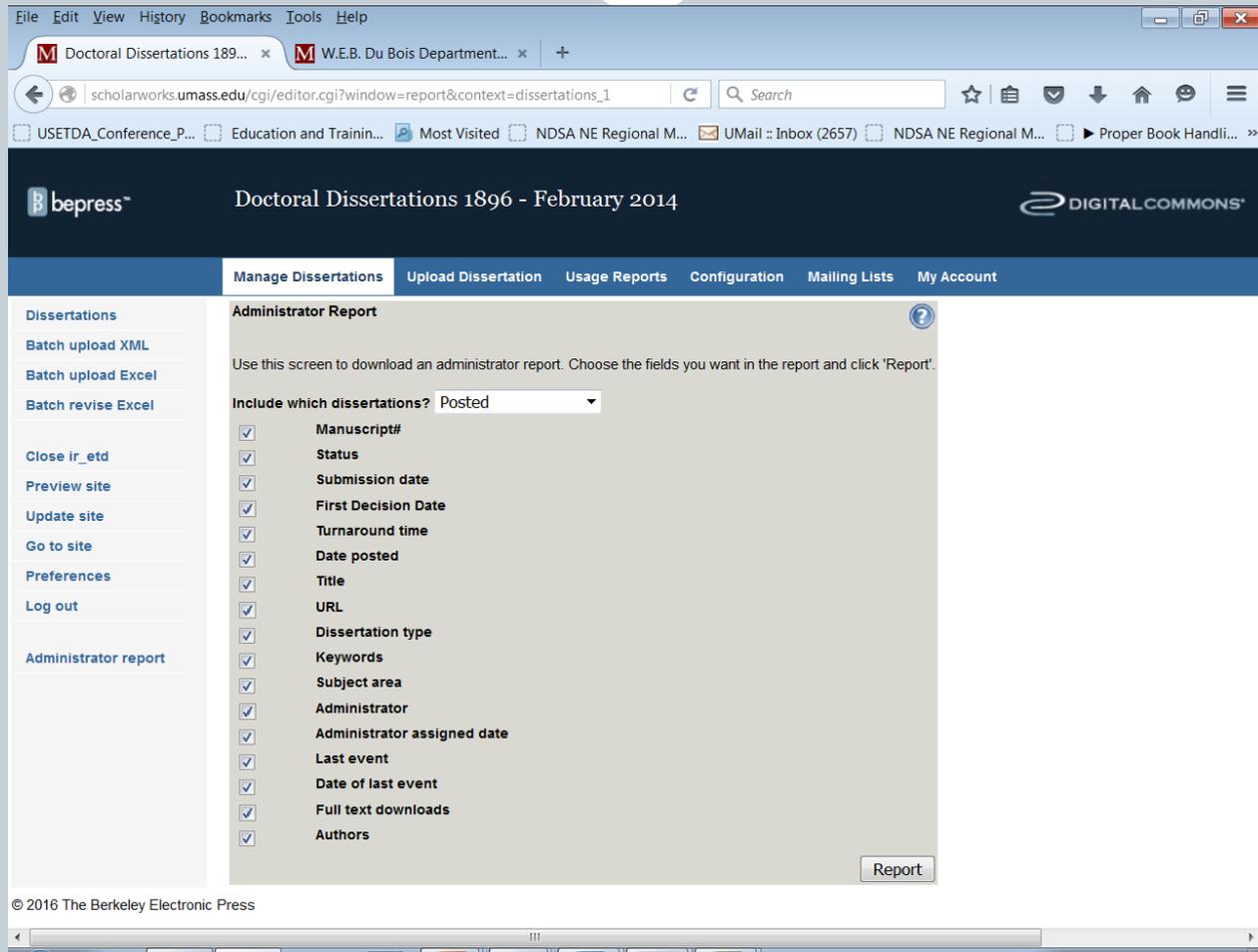
No file selected.

Upload



Note: Please verify spreadsheet metadata before uploading - batch submissions are automatically queued for posting.

Batch Export URLs from Digital Commons



The screenshot shows a web browser window displaying the Digital Commons interface. The browser's address bar shows the URL `scholarworks.umass.edu/cgi/editor.cgi?window=report&context=dissertations_1`. The page title is "Doctoral Dissertations 1896 - February 2014". The interface includes a navigation menu with options like "Manage Dissertations", "Upload Dissertation", "Usage Reports", "Configuration", "Mailing Lists", and "My Account". A sidebar on the left lists various actions such as "Batch upload XML", "Batch upload Excel", "Batch revise Excel", "Close ir_etd", "Preview site", "Update site", "Go to site", "Preferences", "Log out", and "Administrator report". The main content area is titled "Administrator Report" and contains the following text: "Use this screen to download an administrator report. Choose the fields you want in the report and click 'Report'." Below this text is a dropdown menu labeled "Include which dissertations?" with "Posted" selected. A list of fields follows, each with a checked checkbox: Manuscript#, Status, Submission date, First Decision Date, Turnaround time, Date posted, Title, URL, Dissertation type, Keywords, Subject area, Administrator, Administrator assigned date, Last event, Date of last event, Full text downloads, and Authors. A "Report" button is located at the bottom right of the form. The footer of the page reads "© 2016 The Berkeley Electronic Press".

Batch Add URLs to MARC Records



ALEPH Cataloging - Version 22 Library: FCL01 - Test (FCL01) Server: fca.library.umass.edu:6991 User: MBANACH

ALEPH View Cataloging Items Edit Actions Edit Text Record Manager Remote *Services Help ?

HO System No. 10489118 Morphological and ecological studies of (Sweetman, Harvey Leroy, 1896-) Year: 1930

Barcode

Leader	LDR	—	—	^^^^^nx^^^a22^^^^^1n^4500
Owner	OWN	—	a	UM
Fixed Data	008	—	—	1505292p^^^^8^^^1001uueng1000000
Link	LKR	—	a	HOL
			l	FCL01
			b	014630330
Location	852	—	b	UMDUB
			c	UWETD
Elec.Loc.Acc.	856	41	u	http://scholarworks.umass.edu/dissertations_1/887
			z	Link to free resource

[R] Edit Records
FCL60-1048911
FCL01-1463033
[I] Import Record
[T] Triggers

FCL01 - 1463033
OBJECTS (N)
FCL60
HOL - U

PREPARING FOR LINKED DATA IN DIGITAL REPOSITORIES



Sai Deng, University of Central Florida Libraries

How do digital repositories accommodate authority control?

CONTENTdm

- Allows **controlled vocabulary** to be defined for each field;
- **Look up and add** terms;
- Need to either **define the controlled list yourself**, or **choose to use a built-in thesaurus** (from OCLC Terminologies Service).

Dspace

- Fields can be configured to **allow authority control**;
- **Look up and add** terms;
- Need to define the controlled list, **keywords and subjects are not distinguished**, allow LCSH;
- Not linked to national or international authority database for control.

Digital Commons

- **Discipline thesaurus** functions as broad subjects;
- **Author Merge Tool**: merges various names but names are created based on author/submitter's email, not authority file;
- Allow fields to be defined as **link-friendly**.

Authority Control in Digital Repositories: a step towards a linked data world? A step away from the growing popular keyword search?

Authority Control in Digital Repositories and Related Linked Data Projects

- Myntti, J. & Cothran, University of Utah collaborated with Backstage Library Works. Authority control in a Digital Repository: Preparing for Linked data. Adapted the process for MARC 21 authority control for digital collections @ CONTENTdm.
- Tarver et al., University of North Texas Libraries: UNT Names (<http://digital2.library.unt.edu/name/>), link to other vocabularies such as VIAF, LC name authority file, Google Scholar author profile, LinkedIn profile.
- Ideally, the systems can accommodate linked data or you have the resources to help you create external linked data and implement data reconciliation. If not, what can be done as a metadata librarian or a cataloging librarian?

The UCF Libraries' Experiment of Adding Linked Data Fields to Its IR @ Digital Commons

Creator (Linked data)	Cassanello, Robert (VIAF); Cassanello, Robert (LC)
Contributor (Linked data)	Doran, Glen H. (VIAF); Doran, Glen H. (LC); Milanich, Jerald T. (VIAF); Milanich, Jerald T. (LC); Florida Memory Project (VIAF); Florida Memory Project (LC); Florida. Division of Historical Resources (VIAF) ; Florida. Division of Historical Resources (LC) ; Brevard Museum of History and Natural Science (Cocoa, Fla.) (VIAF) ; Brevard Museum of History and Natural Science (Cocoa, Fla.) (LC) ; Orange County (Fla.). Regional History Center (VIAF); Orange County Regional History Center (LC)
Collection	A History of Central Florida: Podcast
Geographic Coverage	Windover Pond Site (Fla.); Brevard County (Fla.)
Temporal Coverage	6000BC-5000BC
Contributor	Doran, Glen H.; Milanich, Jerald T.; Wentz, Rachel K.; Florida Memory Project; Florida. Division of Historical Resources; Brevard Museum of History and Natural Science (Cocoa, Fla.); Orange County Regional History Center; RICHES of Central Florida
Disciplines	Archaeological Anthropology History of Art, Architecture, and Archaeology Public History Social History
Description	In this episode of A History of Central Florida we spoke with Drs. Glen Doran , Jerald Milanich , and Rachel K. Wentz about the Windover Burial Site available in replica form at The Brevard Museum of History and Natural Science .

Linked to VIAF or LC name authority uri(s)

Linked data fields:

- Use Digital Commons memo fields which allow links, e.g., Creator (Linked data), Contributor (Linked data);
- Both VIAF and LC linked data uri(s) are added for the names.

Statement: Subject – Predicate - Object

This podcast – has contributor – [Doran, Glen H.](#)

The UCF Libraries' Experiment of Adding Linked Data Fields to Its IR @ Digital Commons



Doran, Glen H.    
VIAF ID: 20935114 (Personal)
Permalink: <http://viaf.org/viaf/20935114>
ISNI: [0000 0000 7142 3781](http://www.isni.org/0000-0000-7142-3781)

Virtual International
Authority File (VIAF):
[Doran, Glen H.](http://viaf.org/viaf/20935114)

Works

Show 10 entries Search:

Title	Sources
Archaeological investigations at Naval Live Oaks : studies in spatial patterning and chronology in the gulf coast of Florida	
The stickleaf site, 1976 (a.e.)	
Windover : multidisciplinary investigations of an early archaic Florida cemetery	
Windover, 2002:	

Showing 1 to 4 of 4 entries Previous 1 Next

Selected Co-authors

1. Piatek, Bruce J. (2)
2. Milanich, Jerald T. (2)
3. University of California, Davis (1)

- Countries of Publication (1)
- Publication Statistics
- Selected Publishers (3)
- About
- Record Views
- History of VIAF ID:20935114 (6)

Doran, Glen H.

From [Library of Congress Name Authority File](#)

Details Visualization

LC Name Authority File:
[Doran, Glen H.](#)

Doran, Glen H.

URI(s)

> <http://id.loc.gov/authorities/names/n77017496>

Instance Of

- > [MADS/RDF PersonalName](#)
- > [MADS/RDF Authority](#)
- > [SKOS Concept](#)

Scheme Membership(s)

> [Library of Congress Name Authority File](#)

Collection Membership(s)

- > [Names Collection - Authorized Headings](#)
- > [LC Names Collection - General Collection](#)

Exact Matching Concepts from Other Schemes

> <http://viaf.org/viaf/sourceID/LC%7Cn+77017496#skos:Concept>

Sources

- > found: Keller, John Esten. The stickleaf site, 1976 (a.e.) t.p. (Glen H. Doran)
- > found: Windover, 2002: CIP t.p. (Glen H. Doran) data sheet (b. 06-19-50)

Change Notes

- > 1977-12-12: new
- > 2001-09-20: revised

Alternate Formats

- > [RDF/XML \(MADS and SKOS\)](#)
- > [N-Triples \(MADS and SKOS\)](#)

The UCF Libraries' Experiment of Adding Linked Data Fields to Its IR @ Digital Commons

Title	Episode 01 Windover Burial Site
Series Producer	Robert Cassanello, <i>University of Central Florida</i>
Streaming Media	https://www.youtube.com/watch?v=-UYVBFHo-As
Media Format	embedly
Title - Alternative	Windover Burial Site
Preferred Title	A History of Central Florida: Podcast
Keywords	Archaic Indians; Archaic Florida Indians; Mortuary period; Archaic society; Death; Land; Preparation
Subjects	Windover Pond Site (Fla.); Paleo-Indians--Funeral--Florida--Brevard County; Burial--Florida--Brevard County; Brevard County (Fla.)--Antiquities; Tools; Tools, Prehistoric--Analysis; Bone implements, Prehistoric--Florida--Brevard County; Water-saturated sites (Archeology); Civilization
Type	Video; MovingImage

Keywords and Subjects:

- Separate fields;
- Some subjects have linked data uri(s), some subjects with subdivisions don't have individual uri(s);
- Both are only text fields; possible to add links;
- Digital Commons only display keywords as facets; need to request to add subjects as facets

Type, geographic coverage, etc.: can convert to linked data fields.

analysis; Prehistoric tools; Prehistoric bones; Prehistoric fabrics; Archaic in-death; Bury ritual; Native Americans; Artifacts; Bury goods

More possible statements:

This podcast – has subject – Indians

This podcast – has type – MovingImage

This podcast – has geographic coverage – Brevard County (Fla.)

Cataloging Digital Collections @ CONTENTdm: Adding Linked Data Values/Labels

- **CONTENTdm: Adding linked data values** to some fields for some collections
 - CONTENTdm doesn't "fully" accommodate linked data;
 - **Trying to catalog using linked data values for various fields**, such as: Name, Place, State, Country, subjects... (terms uri(s) not added)
 - Use "Subject" and "Keyword" fields separately;
 - Always **search LC Linked Data services, FAST and other online thesauri.**
- **Non-MARC data in digital repositories can take advantage of controlled vocabularies** used in traditional library catalogs and furthermore, linked data lists;
- Is it deemed good practice for the catalogers to **use linked data values/labels** to prepare for the linked data in digital repositories?

Some Reflections

■ Limitations of Existing Authority Files:

- VIAF, LC Name Authority, Local Authority... (Inadequate)
- When automatic full validation and data reconciliation is not yet built-in to the systems, how much time can be spent checking and adding the linked data values?
- Is it the ideal world: Keywords co-exist with controlled vocabularies, especially linked data lists? (More freedom vs. more control?)

■ Reactions to Linked Data

- General initial reaction: Confusion, doubts;
- Support experiments will try and evaluate...

Some Reflections

- **Collaboration and Consensus Building**
 - Collaboration between Cataloging and Digital Initiatives;
 - Collaboration between the library and other university units: The Regional Initiative for Collecting the History, Experiences, and Stories of Central Florida (RICHES), History Department...
 - Consensus building, experiments and evaluation

- **Possibilities:**
 - **Name lists in linked data form** (to meet local needs)
 - **Personal Names:** (link to) VIAF; LC authority name; Google Scholar profile; DBpedia; ORCID...
 - **Organizational Names:** (link to) VIAF; LC authority name headings...
 - **Geographic names, places:** (link to) LC authority geographic names; GeoNames...
 - **Create linked data from collections:** Create mapping between metadata elements and data model predicates; Implement reconciliation; Build interface for access and displaying of linked data

References and Readings

Lampert, Cory K. & Southwick, Silvia B. (2013). Transforming CONTENTdm metadata into linked open data. CONTENTdm Virtual Conference, December 2013.

Luyten, Bram. ORCID for DSpace (2014). <http://www.slideshare.net/bramluyten/orcid-identifiers-for-dspace>

Myntti, J. & Cothran N. (2013). Authority Control in a Digital Repository: Preparing for Linked Data. *Journal of Library Metadata*. Volume 13, Issue 2-3, 2013.

Tarver, H., Waugh, L., Philips, M. & Hicks W. (2013). Implementing name authority control into institutional repositories: A staged approach. UNT Digital Library. <http://digital.library.unt.edu/ark:/67531/metadc172365/>.

University of Central Florida Libraries (2015). STARS: Showcase of Text, Archives, Research & Scholarship. <https://library.ucf.edu/find/stars-digital-repository/>

Cover background photo: WorldCat Works linked data

Thank you!

Contact: Sai Deng, Metadata Librarian, sai.deng@ucf.edu

Acknowledgements:

- Lee Dotson, Digital Initiatives Librarian, Lee.Dotson@ucf.edu
- Peter Spyers-Duran, Cataloging Librarian, Peter.Spyers-Duran@ucf.edu
- Jeanne Piascik, Principal Cataloger, Jeanne.Piascik@ucf.edu
- Mary Page, Associate Director, Collections & Technical Services, Mary.Page@ucf.edu

Technical Services librarian as a project manager

Nastia Guimaraes

Project Management Librarian

University of Notre Dame

Presented at the ALA Midwinter meeting of ACRL Technical Services IG in Boston, MA, on January 9, 2016

Hesburgh Libraries at the University of Notre Dame

- Over 8,000 undergraduates; 3,500 graduate students
- ARL library
- 60 faculty (librarians) and 136 staff
- Major reorganization in 2012; additional reorg in the fall of 2015
- Abundance and variety of projects

Formation of the virtual Project Management Office (PMO)

- One staff project manager hired in 2014
- Technical Services Librarian moved into PM role full time in October, 2015
- Two more staff project managers joined the PMO shortly after
- PMO sponsor: AUL for Digital Access, Resources and Information Technology Division

Examples of projects PMO has been managing

- Coordination of developers' efforts working on new databases and online tools' creation
- Vendor digitization projects
- Off-site storage transfer project
- Collaboration between the Libraries and ND Press to digitize backlist print publications
- Resource processing backlog inventory

Tools for tracking projects and presenting data

- Started out by using a Google Sheet
- In the fall, 2015 adapted JIRA to present high level overview of all projects and their completion progress
- Weekly PMO meetings with project updates

Benefits of having a TS librarian in PMO

- Knows library business from inside out
- Speaks the same language as other librarians
- Represents professional colleagues during PMO meetings
- Provides much needed PR on behalf of PMO to its constituents (trust factor)

Nastia Guimaraes

Project Management Librarian

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THANK YOU!



ALA Midwinter 2016

ACRL Technical Services Interest Group Lightning Round

The Value of Soft Skills in Technical Services

Penny Lochner, Head of Collection Resource Management

Trexler Library, Muhlenberg College

plochner@Muhlenberg.edu



What Are Soft Skills?

Soft Skills are sometimes called people skills or Emotional IQ. But really, it is more than that.

Monster.com says these are the top 6 Soft Skills sought by employers:

- ▶ Communicating
- ▶ Teamwork and collaboration
- ▶ Adaptability
- ▶ Problem solving
- ▶ Critical observation
- ▶ Conflict resolution

We are in Technical Services, why do we need Soft Skills?

<http://career-advice.monster.com/career-development/getting-promoted/six-soft-skills-everyone-needs-hot-jobs/article.aspx>



Collection Management Unit (a.k.a. Technical Services) at Muhlenberg College

- ▶ Five Staff Members:
 - ▶ Head of Collection Management and Serials and Electronic Resources Librarian
 - ▶ Cataloging and Metadata Librarian (non-serial and Special Collections)
 - ▶ Acquisitions and Budget Manager
 - ▶ Government Documents Assistant
 - ▶ Technical Services Assistant (half-time; serials processing and inventory management)

In 2013, everyone gets along wonderfully. We used the Innovative Millennium ILS. Each person handled her core responsibilities separately from one another. Procedures were well-established & *stable*. Limited need for Soft Skills.



2013: Steering Committee Begins Process of Exploration to Select a New ILS (or LSP)

Decision 1: We definitely want something next generation – a Library Services Platform (LSP)!

Decision 2: As part of the process, we also want to :

- ▶ Set goals for change
- ▶ Actively engage all staff in selection
- ▶ Have each person evaluate the candidate systems for his/her area of expertise.



What is an LSP?

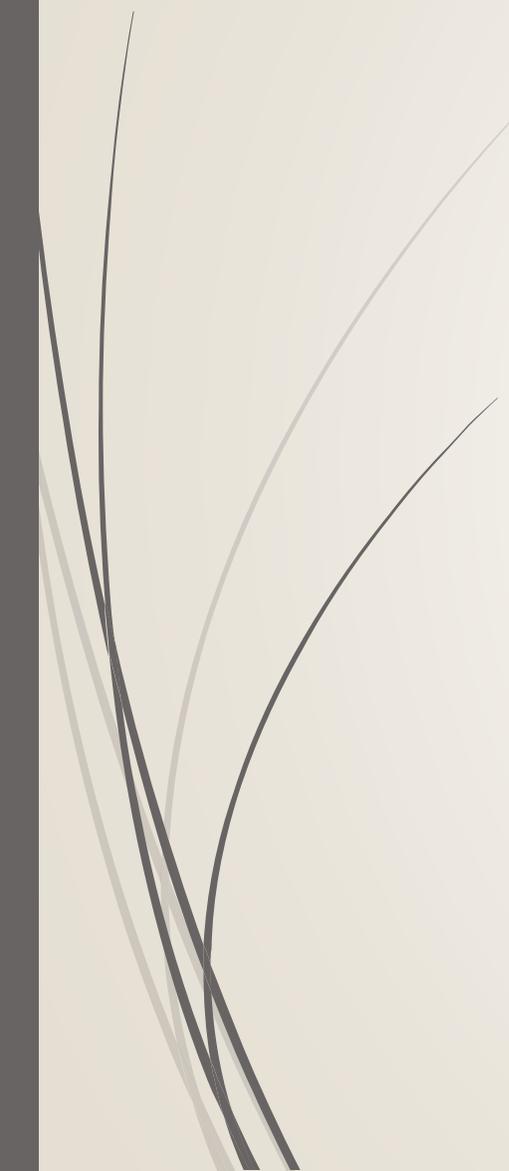
Phrases Used to Describe WMS

- ▶ WMS enables:
 - ▶ **Sharing** of data and **work across** many member libraries
 - ▶ **Improved** workflows and a **drastic** reduction in the time it takes to perform routine tasks
 - ▶ Ability to deliver **new value** to users
 - ▶ Libraries...have also been able to **reallocate** full-time staff to undertake **new initiatives**

From: <https://www.oclc.org/worldshare-management-services.en.html>



We Need a Unit that Can Work as a Team In an Integrated, Agile Environment

- ▶ We need Soft Skills:
 - ▶ Communicating
 - ▶ Teamwork and collaboration
 - ▶ Adaptability
 - ▶ Problem solving
 - ▶ Critical observation
 - ▶ Conflict resolution
 - ▶ Some tactics used to build Soft Skills →
- 



Identify Our Why

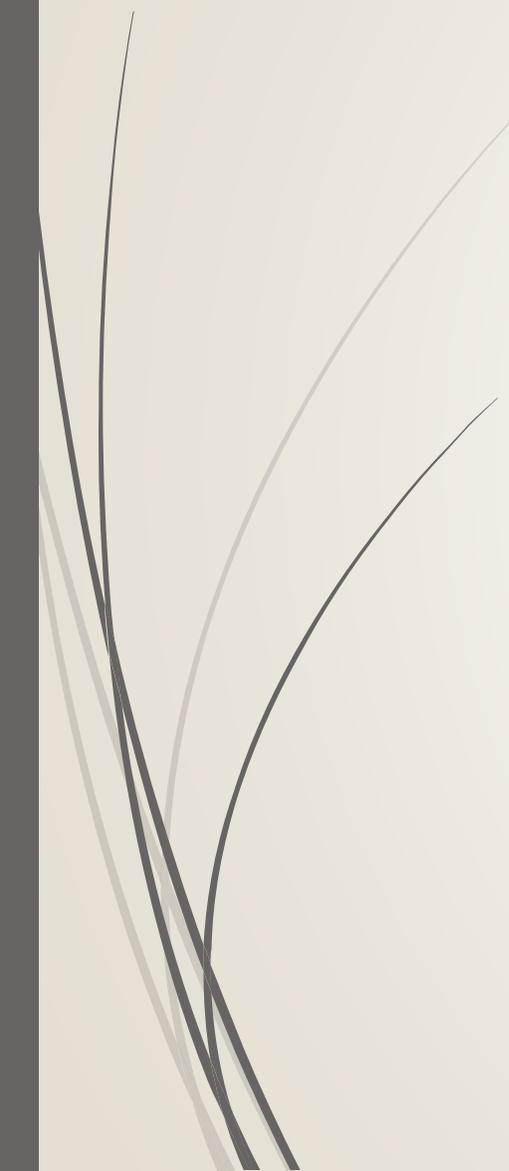
We Know How and What We Do. But it's really about the Why.

- ▶ The value we provide through our jobs will not change with a new system.
- ▶ We are all working toward the same goals.
- ▶ We need to find our why and put it within a context that is shared by others: Institutional and library Mission/Vision/Values; user experience
- ▶ Getting there:
 - ▶ List what we do – our services
 - ▶ Through discussion, identify value/purpose of each service
 - ▶ Connect each service to institutional/library Mission/Vision/Values and/or the user experience
 - ▶ If we can't make a connection, maybe we shouldn't be doing it.

A good source for more on "Why":
Simon Sinek, TED talk or his book *Start with Why*



Role Playing



- ▶ Role play to personally connect with Why and to understand the user experience.

Exercise:

- ▶ Each staff member in the unit was given four questions from a user experience study done the previous year.
- ▶ Directed to spend 15 minutes trying to find the answers to the questions without assistance or collaboration.
No pressure to finish.
- ▶ Discuss the experience
- ▶ Discuss responsibility to our users



Immersion Sharing

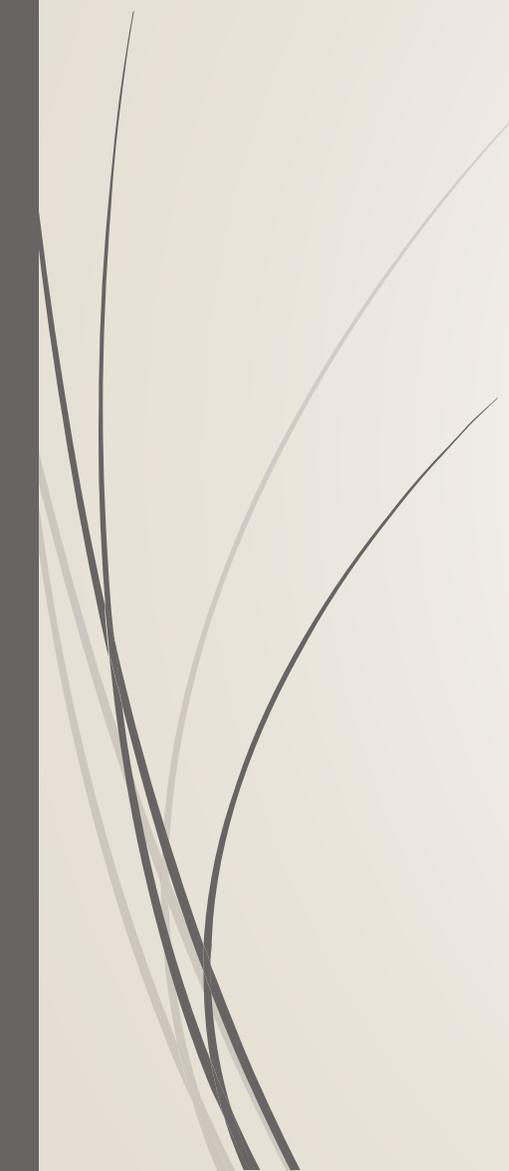
Unit staff meetings are a perfect place to practice communication and sharing:

- ▶ Set the tone – establish a judgement-free zone
- ▶ Ask about problems encountered (also can reveal things that need attention)
- ▶ Encourage staff to share new skills learned and discoveries made
- ▶ This can also be done in the context of training sessions

Take it further by breaking things down and discussing in terms of their purpose rather than just as a process.



Coaching



- ▶ Workflow Development – Delegate & Empower, Don't Abandon
 - ▶ As problems arise or roadblocks come up, ask questions to help clarify the issues that need to be addressed.
 - ▶ Reinforce that they have expertise relevant to the situation at hand.
 - ▶ If you are aware of other staff who can assist, recommend consultation with them.
- ▶ Stress and Decision-Making
 - ▶ Projects requiring collaboration with people who have different perspectives can be stressful and confusing. Checking on progress creates opportunities for consultation and support.
 - ▶ Identify follow up and clarify or restate project goals as needed.
 - ▶ Keep the door open. They will come in to talk.

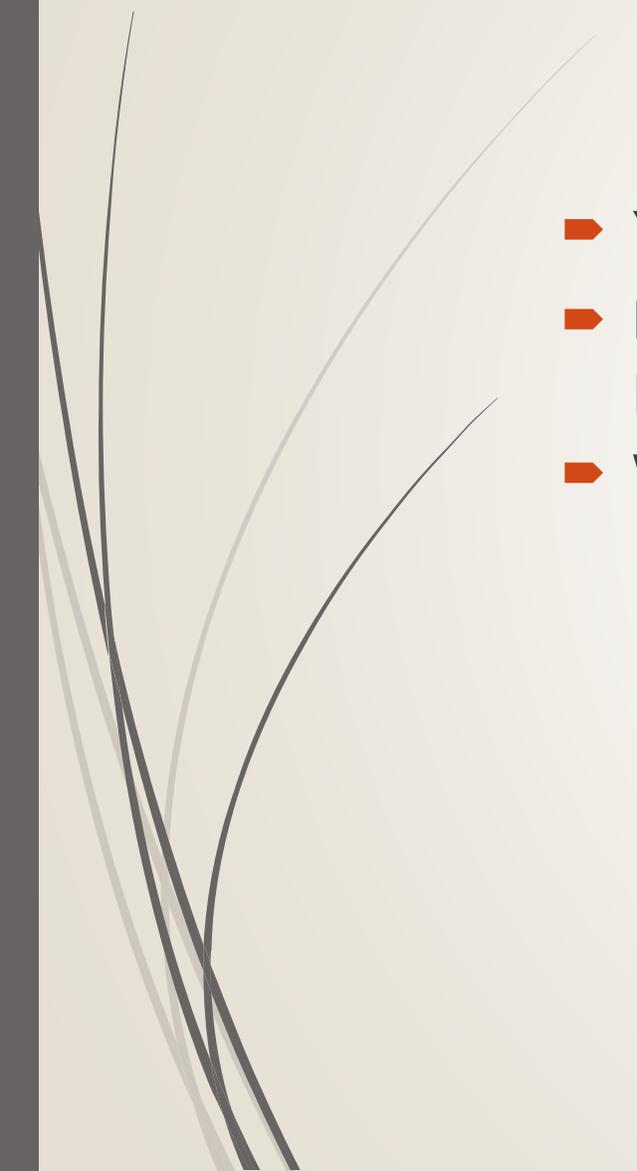


Celebrate Successes

- ▶ Have staff talk about successes big and small
 - ▶ Share what it took to get it done
 - ▶ Identify what was learned
 - ▶ Spell out the value of what was accomplished
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Have These Techniques Worked?

- ▶ Yes!
 - ▶ Results: spontaneous collaboration, new ideas, recognition of problems or need to consult, and more.
 - ▶ We still get along wonderfully.
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Questions?

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