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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

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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





# Assessment Process:

## Department meeting, take 2

### 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



# Process: Responsibilities

- ❁ Split into two kinds of responsibilities:
  - ❁ Specialties = Standards competencies
  - ❁ Technical = Systems competencies + Skills and Abilities competencies

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

# Process: Responsibilities

- Split into two kinds of responsibilities:
  - Specialties = Standards competencies
  - Technical = Systems competencies + Skills and Abilities competencies**

Technical Competencies	Assigned group
<b>MarcEdit</b>	Andrea
	Kurt
	Liz
	Melanie
	Seth
<b>OpenRefine</b>	Andrea
	Anna
	Liz
<b>XML/XSLT</b>	Liz
	Andrea
	Anna

# 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



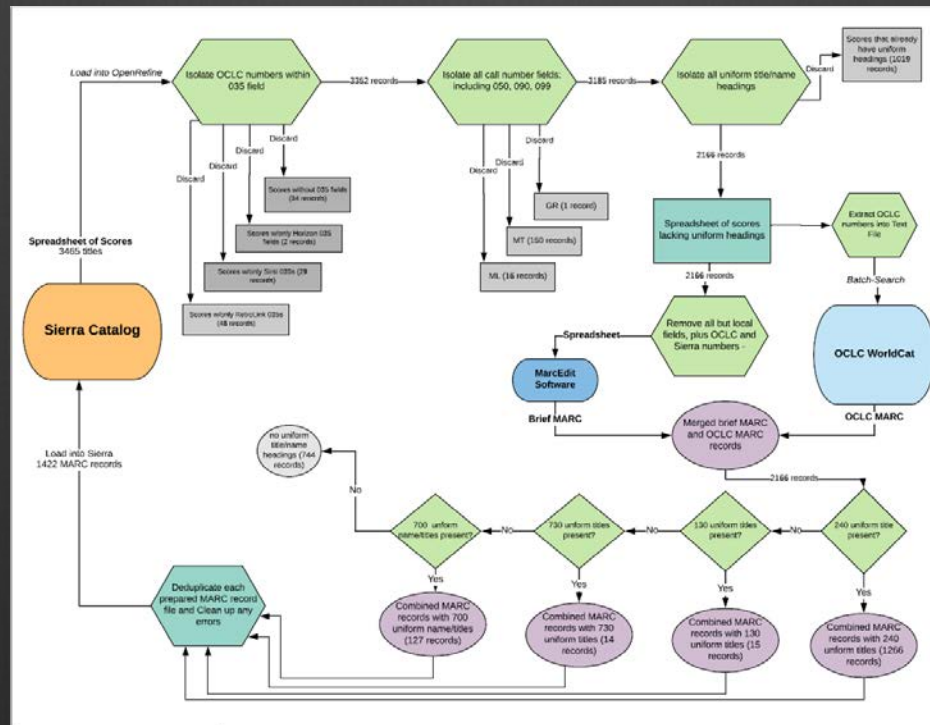


# Implementation

- ⊗ 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

Goal	Activity	Lead	Team Members
<b>Goal #1:</b> Simplify and increase efficiency of database maintenance and correction	<b>Activity #1:</b> Streamline metadata procedures and create a comprehensive application profile for digital collections	Andrea	<ul style="list-style-type: none"> <li>• Anna</li> <li>• Seth</li> <li>• Liz</li> </ul>
<b>Goal #2:</b> Increase visibility and outreach of cataloging and metadata workflows and impact	<b>Activity # 1:</b> Conduct workshops with other departments, such as Table Talks, in order to demonstrate the work or workflows of the unit	Kurt	<ul style="list-style-type: none"> <li>• Melanie</li> <li>• Barb</li> </ul>
<b>Goal #3:</b> Contribute to the scholarship and knowledge of the cataloging and metadata field	<b>Activity #1:</b> Publicly share developed procedures and policies with other catalogers and metadata professionals in the field	Becky	<ul style="list-style-type: none"> <li>• Andrea</li> <li>• Melanie</li> <li>• Liz</li> </ul>
	<b>Activity #2:</b> Create a scholarship interest group to develop collaborative scholarship in the department and increase scholarly publications	Spencer	<ul style="list-style-type: none"> <li>• Anna</li> <li>• Becky</li> <li>• Kurt</li> </ul>
<b>Goal #4:</b> Prepare for changing standards in the field and the subsequent impact on workflows, content management systems, and staffing.	<b>Activity #1:</b> Research and train on ways to begin implementing linked data using the systems and technology we have now	Andrea	<ul style="list-style-type: none"> <li>• Anna</li> <li>• Spencer</li> <li>• Becky</li> </ul>
	<b>Activity #2:</b> 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.	Melanie	<ul style="list-style-type: none"> <li>• Seth</li> <li>• Barb</li> <li>• Kurt</li> </ul>
<b>Goal#5:</b> Improve turn around time and project goal completion	<b>Activity #1:</b> Improve the average turn around time for material being cataloged in the unit	Liz	<ul style="list-style-type: none"> <li>• Seth</li> <li>• Spencer</li> <li>• Becky</li> </ul>

# Goal Setting

## 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., BIBFRAME, 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 7](#), etc.)
  - [Bibframe](#)
  - 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

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

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

Technology and Tools Needed

What tools and technology will be needed to implement this goal.

- Department laptop
- Room 204 or Technical Services Conference room
- Other programs, depending on topics/issues chosen

Personnel and Roles

List the staffing will be needed to implement this goal and what their roles and responsibilities will be? Please include specifics, as needed, such as percentages of time expected.

- Expert in setting up webinars (Kurt)
- Other unit members depending on topics chosen: to provide training (if expert), or identify needs for training
- Melanie/Kurt – will be point persons for this goal/activity

Budget

List the anticipated budget needs.

- TBD – communicate to Liz for all costs

Assessment plan

Outline the processes needed to measure qualitative or quantitative data to show: 1) the benchmarks for achieving this goal, and 2) measurements of deliverables for this goal. What will you need to submit the final annual report?

- List of trainings given in 2018
- Assessment on use of trainings, including survey and discussion at unit meeting
- Touch base meeting in middle of year to see how we are doing/or if one or more topics need changing

Communication Plan

Outline the plan for communicating the progress and needs for this goal. Include the methods and frequency of communication with the unit members, division members, library staff, or administration, as appropriate.

- Meetings
- Email
- Person to person

Stakeholders

Please identify the stakeholders who will benefit from this goal and how it will improve their experience in the library

- CMS members
- Library staff
- Patrons



# 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

- ⊕ Cataloging Competencies Task Force. (2017, January 23). Core competencies for cataloging and metadata professional librarians. <http://hdl.handle.net/11213/7853>

# Questions?

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## Contact Information

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