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Responsive Workflow Design

Liz Woolcott
Utah State University

Clint Pumphrey
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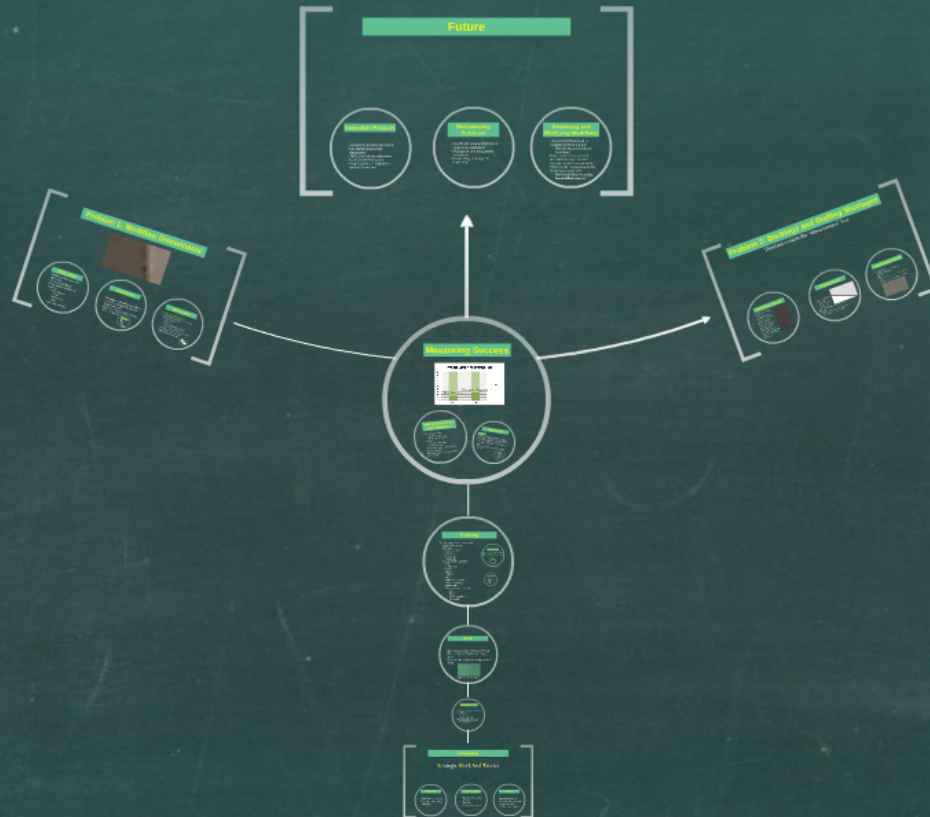
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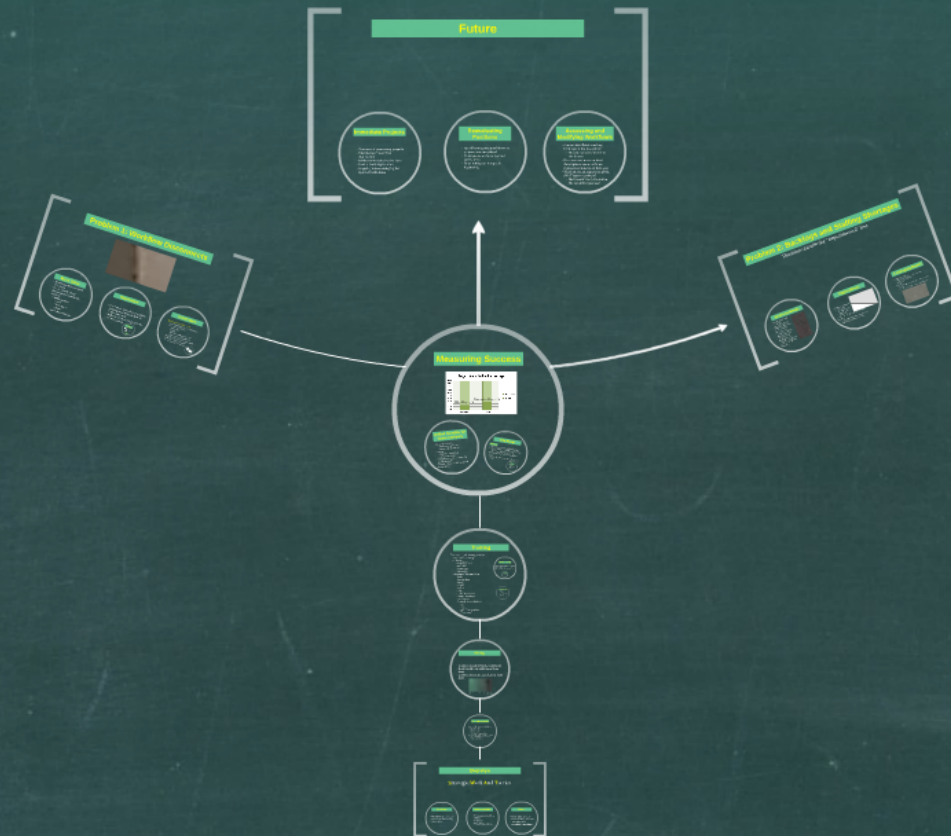
Responsive Workflow Design :

Creating collaborative **cross-departmental** teams for
Cataloging, Digital, and Archives

Liz Woolcott
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Utah State University
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Overview

Strategic **W**ork **A**nd **T**actics

Problems

- Workflow disconnects
- Backlogs and staffing shortages

Implementation

- Developing the Idea
- Hiring
- Training
- Measuring success

Future

- Immediate projects
- Reevaluating positions
- Assessing and modifying workflows

Problems

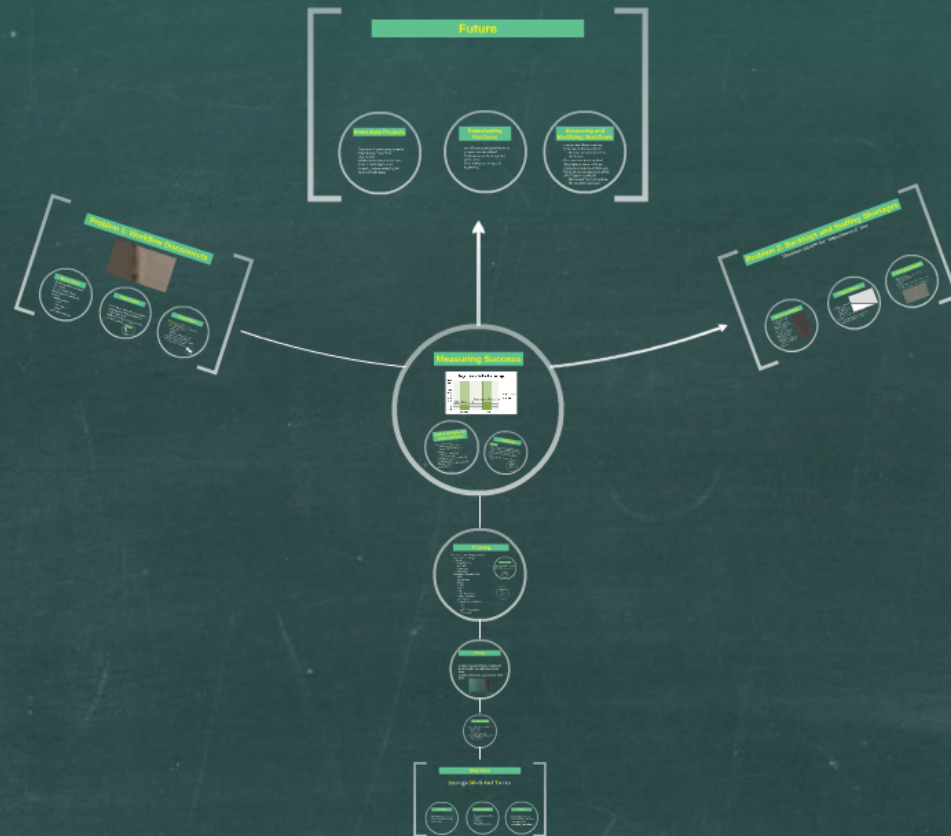
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Problem 1: Workflow Disconnects



Work Silos

- Traditional departmental structures
- Focus on individual departmental workloads leads to:
 - Inefficiencies
 - Staff
 - Resources
 - Time
 - Lost opportunities

Duplication

- Catalogers/Metadata specialists redoing work done by Special Collections staff
- Skill sets for both kinds of work are very similar



Automation

Automation stumbling blocks:

- Each data format has a separate set of rules for determining:
 - Formatting
 - Content
 - What information to record
 - Main source of information
- Display of the record often determines how the content is recorded
- 1:1 or 1:many relationships



Work Silos

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- Skill sets for both kinds of work are very similar

Same Content,
Three Outputs



Dublin Core Records



MARC Records



ead Records

ar

Same Content, Three Outputs



Dublin Core Records



MARC Records

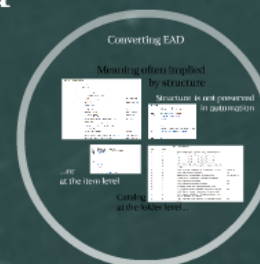


EAD Records

Automation

Automation stumbling blocks:

- Each data format has a separate set of rules for determining:
 - Formatting
 - Content
 - What information to record
 - Main source of information
- Display of the record often determines how the content is recorded
- 1:1 or 1:many relationships



S

Converting EAD

Meaning often implied
by structure

Structure is not preserved
in automation

Letters To Jack London			
Container(s)	Description	Date	
	"A"-"Ac"		
Box	Folder		
5	1	A. Adler and Company (See also Newmark, H.P.)	
5	1	Ahlin, E.	1918 December 5
5	1	Alford, Ernest Haslam (See also The Outlook)	
5	1	Aam, Mrs. H.F.	circa 1916 October 24
5	1	Allen, Charles S. (See also Sunset Magazine)	
5	1	Atwater's Magazine	1899 April 10
5	1	Atwater's Magazine	1901 December 17
5	1	Atwater's Magazine	1903 June 26
5	1	Atkinologist Ltd (Owensford, Hants)	1909 November 15
5	1	Albert Bonnier Publishing House (Norman, Ont)	1910 April 7
5	1	Alden, H.M. (See also Harper and Brothers)	
5	1	Allied Industries of California (Tuttle, Ollie) 1916 October 17	
5	1	American Agronomist	Undated
5	1	American Agronomist	Undated
5	1	American Reprint Publication Society (Blackall, C.B.)	1904 September 10
5	1	The American Magazine (Phillips, John S.)	1905 February 27



...or
at the item level

B1 : Logan Canyon			
Box	Folder		
27	1	Logan Canyon Study Interdisciplinary Team, CH2M Hill, Forest Service, Utah Department of Transportation	
27	2	Logan Canyon Study Interdisciplinary Team, #2	
27	3	Logan Canyon Study Interdisciplinary Team, #3	
27	4	Logan Canyon Study Interdisciplinary Team, #4	
27	5	State of Utah Office of Planning And Budget, 1986 Baseline Projects	
27	6	UDOT Statewide Transportation Improvement Program	1992-1996
27	7	UDOT Highway Needs Inventory	1991
27	8	Department of Transportation Federal Register	1979 October 15
27	9	Citizens for the Protection of Logan Canyon Materials	
27	10	Logan Canyon Public Meetings	1986
27	11	Logan Canyon Public Scoping Meetings	1987
27	12	Notepad of Information concerning Logan Canyon	
28	1	An Assessment of the Feasibility of Developing a National Scenic Highway System, Department of Transportation	1974
28	2	UDOT Reports on Highway U.S. 89-Logan Canyon Study, 1985-87, Prepared by CH2M Hill	
28	3	Three Reports to UDOT by CH2M Hill concerning Logan Canyon	1987

Catalog
at the folder level...

Converting EAD

Meaning often implied by structure

Structure is not preserved in automation

Letters To Jack London		
Container(s)	Description	Dates
	"A" - "Ar"	
Box	Folder	
5	1	A. Asher and Company (See also Newmark, H.P.)
5	1	Aaltio, E. 1908 December 5
5	1	Abbott, Ernest Hawlan (See also The Outlook)
5	1	Agee, Mrs. H.P. circa 1916 October 24
5	1	Aiken, Charles S. (See also <i>Sunset Magazine</i>)
5	1	<i>Ainslee's Magazine</i> 1899 April 10
5	1	<i>Ainslee's Magazine</i> 1901 December 17
5	1	<i>Ainslee's Magazine</i> 1902 June 26
5	1	Aktiebolaget Ljus (Vounded. Henrik) 1909 November 15
5	1	Albert Bonnier Publishing House (Norman, Carl) 1915 April 7
5	1	Alden, H.M. (See also Harper and Brothers)
5	1	Allied Industries of California (Tuttle, Ollie) 1916 October 17
5	1	<i>American Agriculturalist</i> Undated
5	1	<i>American Agriculturalist</i> Undated*
5	1	American Baptist Publication Society (Blackall, C.R.) 1902* September 10
5	1	<i>The American Magazine</i> (Phillips, John S.) 1909 February 27

Object Description

Rating: ★★★★★ Based on D rating(0)

Title: Letter from Jack London to Anna Strunsky, dated August 25, 1902

Creator: London, Jack, 1876-1916

Description: Letter from Jack London to Anna Strunsky, dated August 25, 1902.

Subject LCSH: London, Jack, 1876-1916--Correspondence; Authors, American--20th century--Correspondence; Strunsky, Anna, 1879-1964--Correspondence

Genre: Correspondence

Original Date: August 25, 1902

Geographic locations: London (England); England

Time periods: 1900-1909; 20th century

Notes: The original of this item is located at Utah State University, Merrill-Cazier Library, Special Collections and Archives, COLL MSS 10 Box 37 Folder 1.

Physical Collection Information: [Jack and Charmian London Correspondence and Papers, 1890-1902](#)

Collection Inventory: For more information about this collection, please see the finding aid at: <http://hdl.handle.net/10422/1148>

Call No.: COLL MSS 10 Box 37 Folder 1

Language: eng

Object Description

Rating: ★★★★★ Based on D rating(0)

Title: Correspondence between Logan Canyon and Basin Creek, 1890-1900

Description: A collection of handwritten letters and notes, 1890-1900, relating to the development of Logan Canyon.

Creator: McPherson, Howard

Subject: Logan Canyon, Utah; Basin Creek, Utah; McPherson, Howard

Genre: Correspondence

Original Date: 1890-1900

Geographic locations: Logan (Utah); Basin Creek (Utah); Utah

Time periods: 1890-1899; 19th century

Language: eng

Notes: The original of this item is located at Utah State University, Merrill-Cazier Library, Special Collections and Archives, Merrill-Cazier Library, MSS 10 Box 37 Folder 1.

Physical Collection Information: [Logan Canyon and Basin Creek Correspondence, 1890-1900](#)

B : Logan Canyon		
Box	Folder	
27	1	Logan Canyon Study Interdisciplinary Team, CH2M Hill, Forest Service, Utah Department of Transportation
27	2	Logan Canyon Study Interdisciplinary Team, #2
27	3	Logan Canyon Study Interdisciplinary Team, #3
27	4	Logan Canyon Study Interdisciplinary Team, #4
27	5	State of Utah Office of Planning And Budget, 1986 Baseline Projects
27	6	UDOT Statewide Transportation Improvement Program 1992-1996
27	7	UDOT Highway Needs Inventory 1991
27	8	Department of Transportation Federal Register 1979 October 15
27	9	Citizens for the Protection of Logan Canyon Materials

...or

Letters To Jack London

Container(s)		Description	Dates
		"A" - "Ar"	
Box	Folder		
5	1	A. Asher and Company (See also Newmark, H.P.)	
5	1	Aaltio, E.	1908 December 5
5	1	Abbott, Ernest Hawlan (See also The Outlook)	
5	1	Agee, Mrs. H.P.	circa 1916 October 24
5	1	Aiken, Charles S. (See also <i>Sunset Magazine</i>)	
5	1	<i>Ainslee's Magazine</i>	1899 April 10
5	1	<i>Ainslee's Magazine</i>	1901 December 17
5	1	<i>Ainslee's Magazine</i>	1902 June 26
5	1	Aktiebolaget Ljus (Vounded. Henrik)	1909 November 15
5	1	Albert Bonnier Publishing House (Norman, Carl)	1915 April 7
5	1	Alden, H.M. (See also Harper and Brothers)	
5	1	Allied Industries of California (Tuttle, Ollie) 1916 October 17	
5	1	<i>American Agriculturalist</i>	Undated
5	1	<i>American Agriculturalist</i>	Undated*
5	1	American Baptist Publication Society (Blackall, C.R.)	1902* September 10
5	1	<i>The American Magazine</i> (Phillips, John S.)	1909 February 27

▼ Object Description

Rating	☆☆☆☆☆ Based on 0 rating(s)
Title	Letter from Jack London to Anna Strunsky, dated August 25, 1902
Creator	London, Jack, 1876-1916
Description	Letter from Jack London to Anna Strunsky, dated August 25, 1902.
SubjectLCSH	London, Jack, 1876-1916--Correspondence Authors, American--20th century--Correspondence Strunsky, Anna, 1879-1964--Correspondence
Genre	Correspondence
Original Date	August 25, 1902
Geographic locations	London (England) England
Time periods	1900-1909 20th century
Source	The original of this item is located at Utah State University, Merrill-Cazier Library, Special Collections and Archives, COLL MSS 10 Box 37 Folder 1.
Physical Collection Information	Jack and Charmian London Correspondence and Papers, 1894-1953
Collection Inventory	For more information about this collection, please see the finding aid at : http://uda-db.orbiscascade.org/findaid/ark:/80444/xv27206 ↗
Call No.	COLL MSS 10 Box 37 Folder 1
Language	eng;

Converting EAD

Meaning often implied by structure

Structure is not preserved in automation

Letters To Jack London			
Container(s)	Description	Dates	
	"A" - "Ar"		
Box	Folder		
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5	1	Agee, Mrs. H.P.	circa 1916 October 24
5	1	Aiken, Charles S. (See also <i>Sunset Magazine</i>)	
5	1	<i>Ainslee's Magazine</i>	1899 April 10
5	1	<i>Ainslee's Magazine</i>	1901 December 17
5	1	<i>Ainslee's Magazine</i>	1902 June 26
5	1	Aktiebolaget Ljus (Vounded. Henrik)	1909 November 15
5	1	Albert Bonnier Publishing House (Norman, Carl)	1915 April 7
5	1	Alden, H.M. (See also Harper and Brothers)	
5	1	Allied Industries of California (Tuttle, Ollie) 1916 October 17	
5	1	<i>American Agriculturalist</i>	Undated
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5	1	<i>The American Magazine</i> (Phillips, John S.)	1909 February 27

Object Description	
Rating	***** Based on D rating00
Title	Letter from Jack London to Anna Strunsky, dated August 25, 1902
Creator	London, Jack, 1876-1916
Description	Letter from Jack London to Anna Strunsky, dated August 25, 1902.
Subject LCSH	London, Jack, 1876-1916--Correspondence Authors, American--20th century--Correspondence Strunsky, Anna, 1876-1964--Correspondence
Genre	Correspondence
Original Date	August 25, 1902
Geographic locations	London (England) England
Time periods	1900-1909 20th century
Notes	The original of this item is located at Utah State University, Merrill-Cazier Library, Special Collections and Archives, COLL MSS 10 Box 37 Folder 1.
Physical Collection Information	Jack and Charman London Correspondence and Papers, 1890-1902
Collection Inventory	For more information about this collection, please use the finding aid at: http://hdl.handle.net/10262/11901
Call No.	COLL MSS 10 Box 37 Folder 1
Language	eng

Object Description	
Rating	***** Based on D rating00
Title	Correspondence between Logan Canyon and Logan Canyon, circa 1900
Description	ALMA MATER (U.S.)--Description of study--United States--Description of study--United States
Creator	Logan Canyon, Idaho
Genre	United States--History--19th century Description of study--United States--Logan Canyon Logan Canyon (Idaho)
Notes	
Original Date	circa 1900
Original Date	1890-1900
Geographic locations	Logan (Idaho) Logan (Idaho) United States Idaho Idaho--Description of study United States (Idaho)
Time periods	1890-1900 19th century
Language	eng
Notes	The original of this item is located at Utah State University, Merrill-Cazier Library, Special Collections and Archives, Merrill-Cazier Library, COLL MSS 10 Box 37 Folder 1.
Physical Collection Information	Merrill-Cazier Library, Special Collections and Archives, Merrill-Cazier Library, COLL MSS 10 Box 37 Folder 1

B : Logan Canyon			
Box	Folder		
27	1	Logan Canyon Study Interdisciplinary Team, CH2M Hill, Forest Service, Utah Department of Transportation	
27	2	Logan Canyon Study Interdisciplinary Team, #2	
27	3	Logan Canyon Study Interdisciplinary Team, #3	
27	4	Logan Canyon Study Interdisciplinary Team, #4	
27	5	State of Utah Office of Planning And Budget, 1986 Baseline Projects	
27	6	UDOT Statewide Transportation Improvement Program	1992-1996
27	7	UDOT Highway Needs Inventory	1991
27	8	Department of Transportation Federal Register	1979 October 15
27	9	Citizens for the Protection of Logan Canyon Materials	

...or

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5	1	Agee, Mrs. H.P.	circa 1916	October 24
5	1	Aiken, Charles S. (See also <i>Sunset Magazine</i>)		
5	1	<i>Ainslee's Magazine</i>	1899	April 10
5	1	<i>Ainslee's Magazine</i>	1901	December 17
5	1	<i>Ainslee's Magazine</i>	1902	June 26
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5	1	Albert Bonnier Publishing House (Norman, Carl)	1915	April 7
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5	1	<i>American Agriculturalist</i>	Undated	
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5	1	<i>The American Magazine</i> (Phillips, John S.)	1909	February 27

Object Description

Rating: ★★★★★ (Based on 0 ratings)

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Description: Letter from Jack London to Anna Strunsky, dated August 25, 1902.

Subject:CSH: London, Jack, 1876-1916--Correspondence; Aukland, American--20th century--Correspondence; Strunsky, Anna, 1876-1966--Correspondence

Genre: Correspondence

Original Date: August 25, 1902

Geographic locations: London (England); England

Time periods: 1900-1909; 20th century

Source: The original of this item is located at Utah State University, Merril-Caser Library, Special Collections and Archives, COLL MSS 10 Box 37 Folder 1.

Physical Collection Information: Jack and Charmian London Correspondence and Papers, 1894-1903

Collection Inventory: For more information about this collection, please see the finding aid at : <http://scw-0b.or.biscascade.org/findingaid/ark:/80444/xv27206-0>

Call No.: COLL MSS 10 Box 37 Folder 1

Language: eng

in automation

Description

Rating: ★★★★★ (Based on 0 ratings)

Title: Correspondence between UDOT and State Clin. June 22, 1992

Description: A letter from H.M. Alden to the UDOT and State Clin. dated August 25, 1902.

Creator: Alden, H.M.

Subject: United States--Highway 89; Roadside improvement--Utah--Logan Canyon; Logan Canyon (Utah)

Genre: Correspondence

Original Date: June 25, 1992

Search Date: 1992-06-22

Geographic Locations: Ogden (Utah); Ogden (Utah); Ogden (Utah); Ogden (Utah); Ogden (Utah); Ogden (Utah); Logan Canyon (Utah); Logan Canyon (Utah)

Time Periods: 1990-1999; 20th century

Language: eng

Source: Utah State University, Merril-Caser Library, Special Collections and Archives, Merril-Caser Library, Merril-Caser Library, 1900-1999, COLL MSS 10 Box 37 Folder 1.

Physical Collection: Jack and Charmian London Correspondence and Papers, 1894-1903, COLL MSS 10 Box 37 Folder 1

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28	3	Three Reports to UDOT by CH2M Hill concerning Logan Canyon	1987

...or at the item level

Catalog at the folder level...

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28	3	Three Reports to UDOT by CH2M Hill concerning Logan Canyon	1987

lder level...

▼ Description

Rating	☆☆☆☆☆ Based on 0 rating(s)
Title	Correspondence between UDOT and Sierra Club, June 23, 1986
Description	A letter from H.H. Richardson to Rudy Lukez concerning delineators on US-89 in Logan Canyon
Creator	Richardson, Howard
Subject	United States Highway 89 Roadside improvement--Utah--Logan Canyon Logan Canyon (Utah)
Genre	Correspondence
Original Date	June 23, 1986
Search Date	1986-06-23
Geographic Locations	Ogden (Utah) Logan (Utah) United States Utah Cache County (Utah) Weber County (Utah)
Time Periods	1980-1989 20th century
Language	eng;
Source	Utah State University, Merrill-Cazier Library, Special Collections and Archives, Sierra Club, Utah Chapter Archives, 1972-1986, COLL MSS 148 Series VIII Box 27 Folder 1
Physical Collection	Sierra Club, Utah Chapter Archives, 1972-1986, COLL MSS 148

S

Converting EAD

Meaning often implied
by structure

Structure is not preserved
in automation

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...or
at the item level

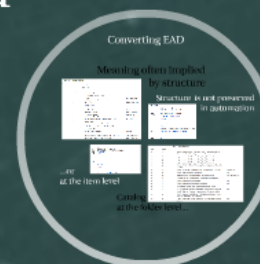
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28	3	Three Reports to UDOT by CH2M Hill concerning Logan Canyon	1987

Catalog
at the folder level...

Automation

Automation stumbling blocks:

- Each data format has a separate set of rules for determining:
 - Formatting
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 - Main source of information
- Display of the record often determines how the content is recorded
- 1:1 or 1:many relationships



Problem 2: Backlogs and Staffing Shortages

Thinking outside the "departmental" box

Archives Needs

- Existing manuscript backlog of approximately 1300 linear feet (limited or no accessibility)
- New donations sometimes demand quick turnaround
- Vast majority of processing done by students; oversight and editing can bog down supervisor



Digital Needs

- Additional staffing for
 - Processing
 - Creating metadata
 - Quality control
 - Promotion
- Prefer Special Collections experience
- Backlogs:
 - 13,000 digital items needing metadata
 - Additional collections on hold

Cataloging Needs

- Additional staffing for:
 - Multiple retro Special Collections projects
 - Authority Control checks
 - Processing
- Backlogs:
 - est. 20-25,000 catalog cards checked against online catalog
 - est. 50% would require original/copy cataloging



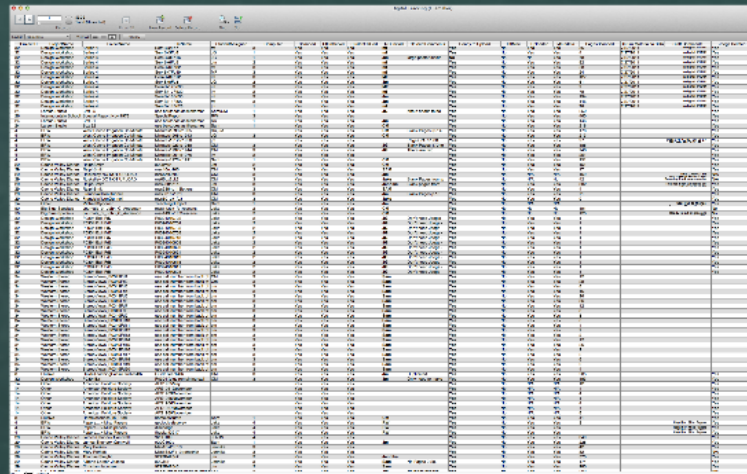
Archives Needs

- Existing manuscript backlog of approximately 1300 linear feet (limited or no accessibility)
- New donations sometimes demand quick turnaround
- Vast majority of processing done by students; oversight and editing can bog down supervisor



Digital Needs

- Additional staffing for
 - Processing
 - Creating metadata
 - Quality control
 - Promotion
- Prefer Special Collections experience
- Backlogs:
 - 13,000 digital items needing metadata
 - Additional collections on hold

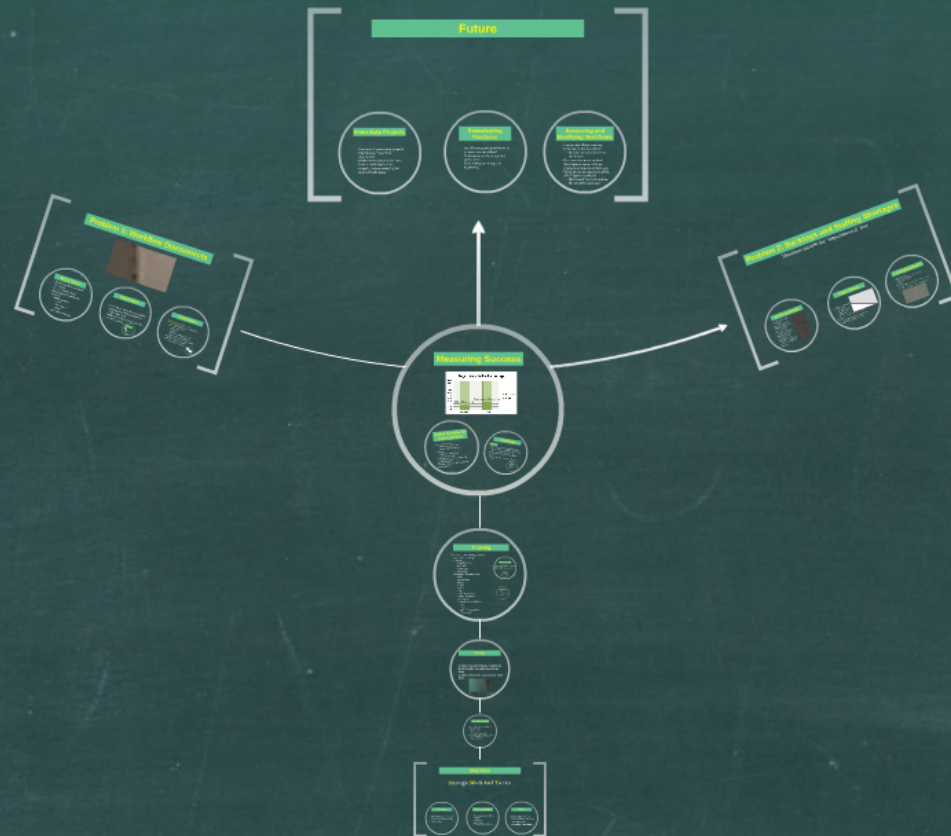


The image shows a screenshot of a spreadsheet application, likely Microsoft Excel, displaying a large table of data. The table has multiple columns, including what appears to be item IDs, titles, dates, and status indicators. The data is organized into several sections, with some rows highlighted in light blue. The spreadsheet is titled 'Digital Backlog' and contains numerous rows of text and numbers, representing a list of digital items that need processing or metadata creation.

Cataloging Needs

- Additional staffing for:
 - Multiple retro Special Collections projects
 - Authority Control checks
 - Processing
- Backlogs:
 - est. 20-25,000 catalog cards checked against online catalog
 - est. 50% would require original/copy cataloging





Responsive Workflow Design :

Creating collaborative **cross-departmental** teams for
Cataloging, Digital, and Archives

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Digital Discovery Library
Utah State University
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Utah State University
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Developing the idea

- Special Collections strategic initiative and position review
 - External needs
 - Internal needs
 - Position recommendations
- Getting approval from administration
 - Cross-departmental positions
 - Temporary staffing

Hiring

- Qualities sought by hiring committee
- Backgrounds and skill sets of those hired
- Qualities necessary according to those hired



Our fantastic team: Seth, Rosie, and Anna

Training

Extensive initial training sessions:

- Archival Processing
- Software
 - CONTENTdm
 - OXYGEN
 - Connexion
 - Sierra (III)
- Standards/Formats/Rule
 - EAD
 - Dublin Core
 - DACS
 - MARC
 - AACR2
 - RDA
 - ISBD Punctuation
 - Subject headings
 - Local notes
 - Controlled vocabularies
 - AAT
 - TGN
 - AFS Ethnographic Thesaurus

Phased Training

- Phase 1 - Metadata Creation (3 months)
- Phase 2 - Cataloging (3 months)
- Phase 3 - Archival Processing (1 month)

Partnerships

Summer Training Series

- Omeka
- Excel
- History Pin
- Teello
- Digital exhibit building
- Digitization
- Digital format conversion

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Peer-to-Peer Training

- Multiple trainings due to fluctuations in metadata team
 - Initial training by Metadata Librarian
 - Subsequent trainings done by team members
- Quality Control
 - Peer review

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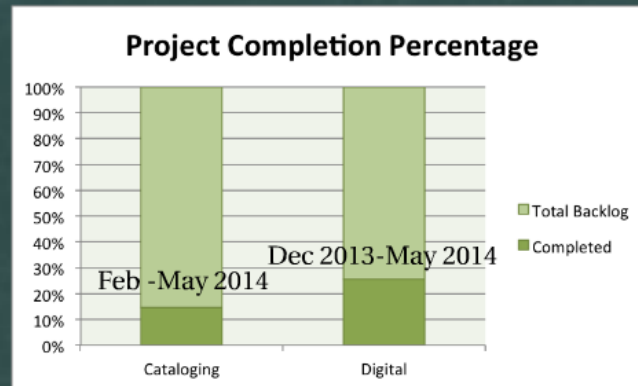
Partnerships

- University of Michigan
- University of Toronto
- University of British Columbia
- University of Alberta
- University of Saskatchewan
- University of Manitoba
- University of New Brunswick
- University of Regina
- University of Winnipeg
- University of Northern British Columbia
- University of Northern Iowa
- University of North Dakota
- University of South Dakota
- University of South Florida
- University of Florida
- University of Georgia
- University of Alabama
- University of Mississippi
- University of Tennessee
- University of Kentucky
- University of Missouri
- University of Arkansas
- University of Louisiana
- University of Texas
- University of Oklahoma
- University of Wisconsin
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- University of Alabama
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- University of Illinois

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Measuring Success



Added benefits for team members

- Broad list of skills :
 - Software experience
 - Rules and standards
- Service:
 - Library committees
 - Reference desks
- Flexibility for team members to pursue interests
- Tangible projects with goals and deliverables

Take Aways

- Positives**
- Dedicated staff can knock out backlogs more efficiently than dedicated staff time
 - Moral boosting for rest of staff
 - Responsive teams can meet deadlines faster
 - Team based approaches provide support systems



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- R
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- Tea
- sys

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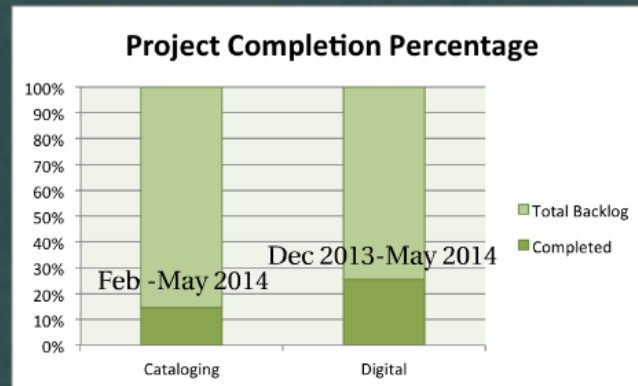
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- Training takes time, plan for it
- Plan for the workload of the supervisor to double in the beginning
 - Just remember - the long term benefit is greater than the upfront cost
- Communication is essential
- Measure success visually
 - For your team
 - For your administrators

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Future

Immediate Projects

- Manuscript processing projects
- Identifying material for digitization
- Adding new digital collections
- Look at bulk digitization
- Ongoing retro cataloging for Special Collections

Reevaluating Positions

- Recalibrating responsibilities as projects are completed
- Making one or more position permanent
- Responding to changes in leadership

Assessing and Modifying Workflows

- Are our workflows creating backlogs in the first place?
 - How do we prevent this in the future?
- How can we create archival descriptions once and then extrapolate into other formats?
- What are the perspectives of the SWAT team members?
 - How would they streamline the workflow process?



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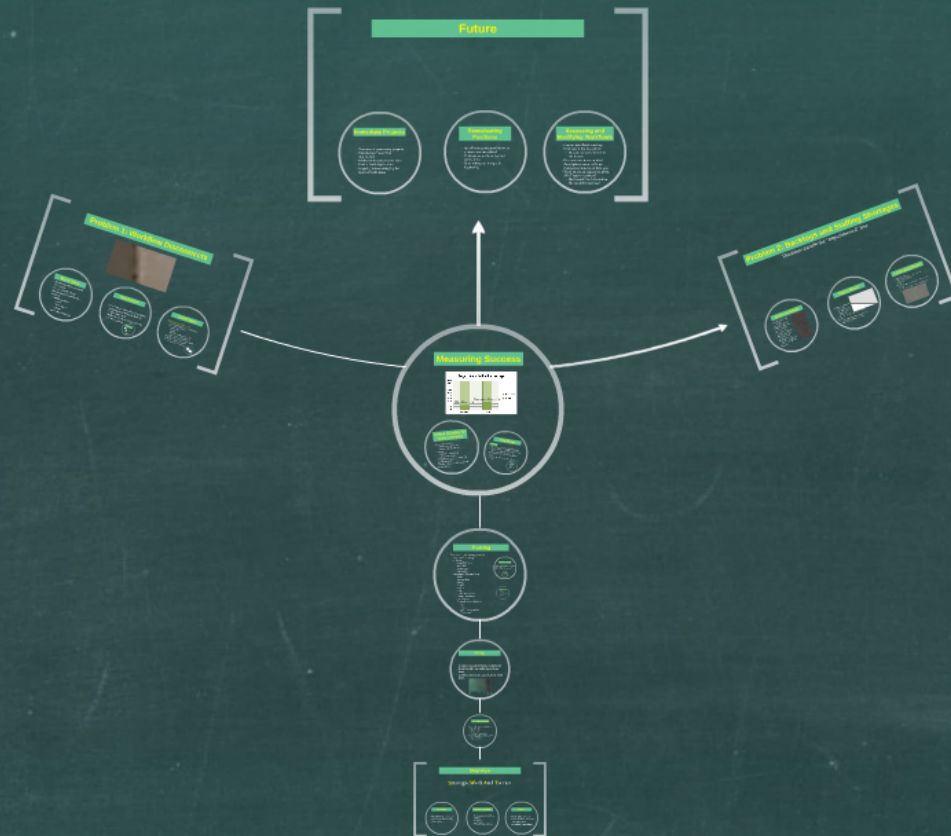
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