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Staffing the Repository: How to build your team and use it effectively

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Staffing the Repository

How to build and use your team effectively
by Brad Matthies

2.10.2011

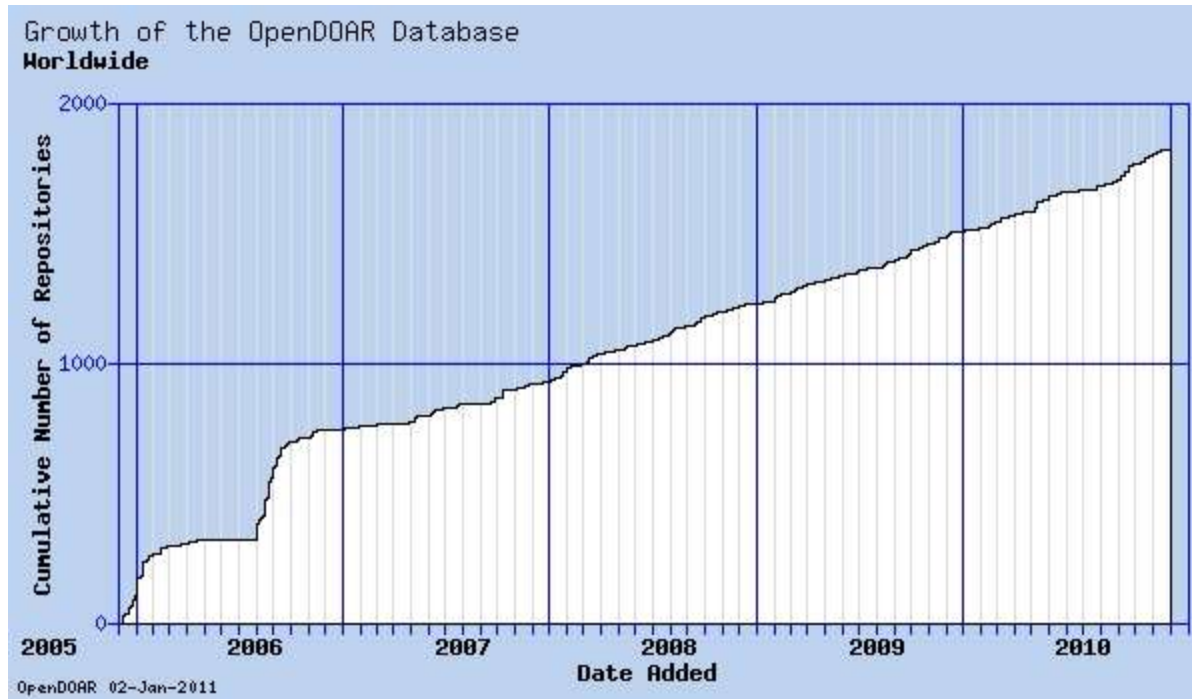
Agenda

- ▶ Briefly address resistance to IRs
- ▶ A little about Butler Libraries
- ▶ How we developed our distributed workload
- ▶ How to achieve scalability
- ▶ Some suggestions for small and medium-sized libraries

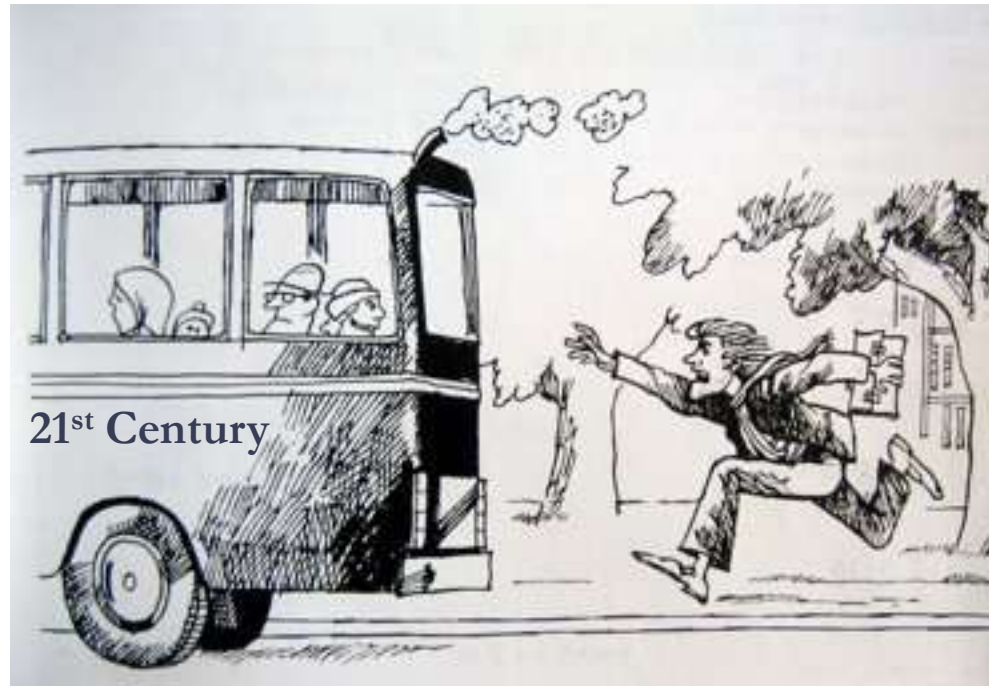


2001: A Librarian Tells Me That...

“Repositories are just a fad.”



Established Fact: In 2011 Most Academic Libraries Are Pursuing Digital Initiatives



An Appeal To Logic: Academic Libraries Are Changing

▶ Several Recent Reports

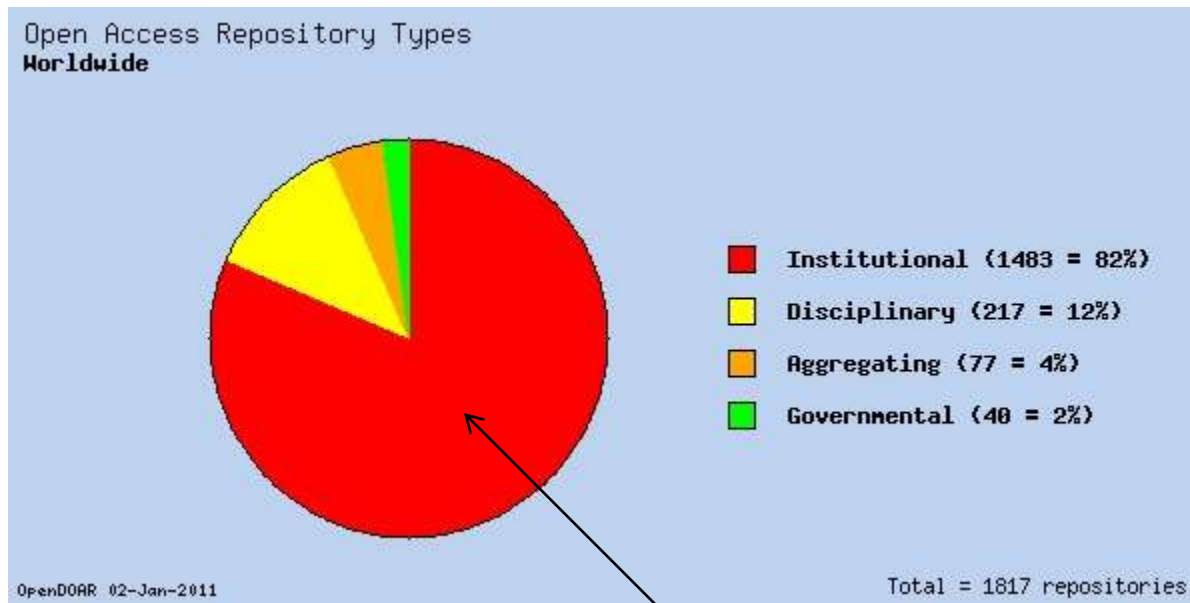
- ▶ *Research Libraries, Risk and Systemic Change* by OCLC Research (2010)
- ▶ *The Digital Information Seeker* report by the Higher Education Funding Council (2010)
- ▶ *Ithaka Faculty Survey* (2009)

▶ According to these and other reports...

- ▶ Academic libraries are changing from places of **knowledge access** to places of **knowledge creation**.



Institutional Repository Solutions *Can* Help Libraries Create New Knowledge



Your Library Here!

The Small To Medium-Sized Library Dilemma



Librarians at smaller institutions often have multiple job duties. Therefore, it can be a challenge to take on new initiatives or to maintain new systems with only a finite amount of staffing.



What Follows Is One Possible Way To Staff Your Repository

▶ **But first...**



A Little About BU And The BU Libraries

▶ **Butler University**

- ▶ Private liberal arts college with 4,437 students
- ▶ Six colleges
- ▶ 55 undergraduate, one professional and 18 master's degrees

▶ **Butler University Libraries**

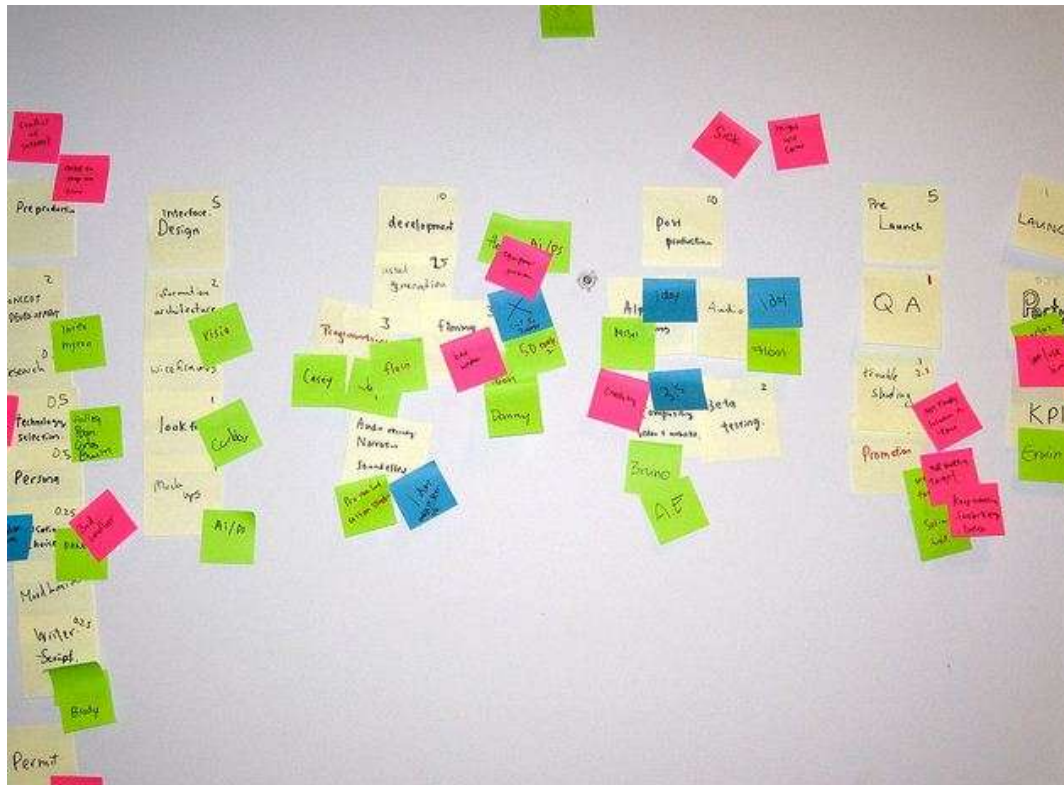
- ▶ 12 FT Faculty Librarians
 - ▶ All have subject liaison duties and are expected to publish, present, and be active professionally
- ▶ 13 FT Staff
- ▶ 10 -15 student circulation workers



BU Digital Commons

- ▶ Over 2,700 objects in approximately 2.5 years
- ▶ Collected undergraduate and graduate ETDs
- ▶ Archived two journals
- ▶ Actively publishing one journal
- ▶ Populated 30 series
- ▶ Built a gallery of Selected Works pages on behalf of faculty
- ▶ **Never have had more than ½ of an FTE at any given time**
- ▶ **Workload distributed across several FTE, student employees, interns, and volunteers**

Developing A Distributed Workload



Content & Staffing: July 2008 – December 2008

▶ Content

- ▶ *Butler University Botanical Studies* (discontinued journal series)
- ▶ Faculty contributions

▶ Initial staffing

- ▶ Project manager (approximately 16 hours per week)
- ▶ Access Services had the equipment, scanning expertise, student help, and ability to adjust staff workloads



Assessment: July 2008 – Dec. 2008

- ▶ **Hands-on project management (i.e. initially the project manager did it all!)**
 - ▶ Allowed the project manager to learn the process and set reasonable goals for his team
 - ▶ Not sustainable long-term
- ▶ **Content**
 - ▶ Selected Works and faculty contributions not growing at the rate we had hoped
 - ▶ Decided to build Selected Works pages on behalf of faculty



Content: January 2009 – July 2009

- ▶ *Butler University Botanical Studies* (discontinued journal)
- ▶ *Word Ways* (active journal)
- ▶ Faculty Contributions (a snapshot of the intellectual publishing history of BU)
- ▶ Building Selected Works pages on behalf of faculty

Staffing: January 2009 – July 2009

- ▶ One librarian as the project manager (approx. 8 hrs/week)
 - ▶ Less direct involvement with production
 - ▶ More involvement with project management, troubleshooting, and marketing
- ▶ One circulation staff (5-15 hrs/week – Journal Publishing)
- ▶ Two student workers (approx. 7 hrs/week each – scanning)
- ▶ One MLS intern (approx. 15 hrs/week – Selected Works)

Assessment: January 2009 – July 2009

▶ Staffing

- ▶ Intern helped develop workflows for Selected Works
- ▶ After internship completed revised/streamlined workflows before assigning to library staff
- ▶ Content selection should be balanced against available staffing
 - ▶ Continuous publishing (e.g. journal series, thesis, etc.)
 - ▶ One-shot contributions (e.g. individual faculty contributions, ceased publications, etc. – content with a definite end date)

Assessment Cycle



Helped us develop our workflows and a “distributed workload”

Staffing: August 2009 - Present

- ▶ One librarian as the project manager (approx. 4 hours every other week)
 - ▶ Project management, troubleshooting, and training
 - ▶ Some Selected Works involvement (e.g. building pages, permissions, uploads, maintenance of current pages, etc.)
 - ▶ Engaging faculty (e.g. E-newsletter, annual report, presentations & one-on-one meetings)
- ▶ Permanent Digital Commons Team
 - ▶ One circulation staff (2 - 4 hrs/week – Journal Publishing)
 - ▶ One circulation staff (5 - 10 hrs/week – Selected Works)
 - ▶ One circulation staff (2 - 6 hrs/week – Thesis work)
- ▶ Rotating Digital Commons Team
 - ▶ One librarian (4 hrs/week – Yearbook Project)
 - ▶ Up to six student workers rotated throughout the year (1- 2 hrs/week each – scanning, checking records, uploading, other duties as assigned, etc.)

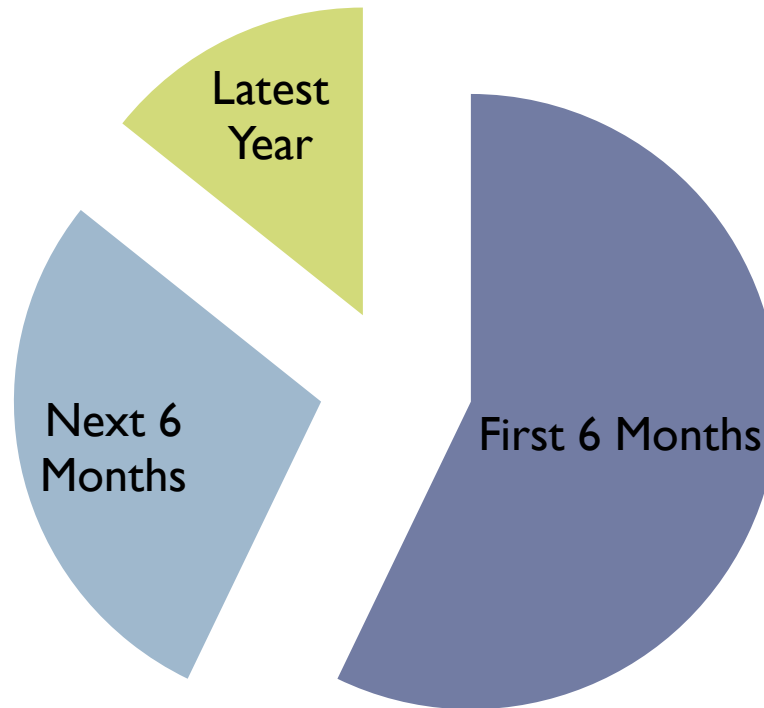
Note: These are estimates and there are weeks when we are not in production.

It May Seem Like This...

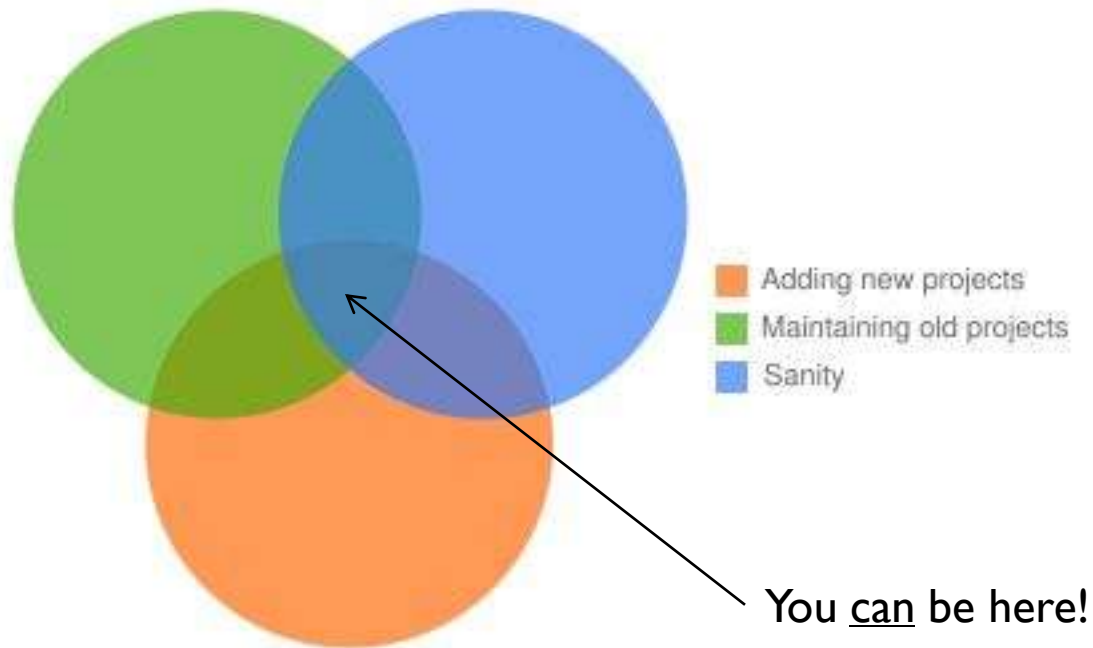


It's Really More Like This!

Project Manager's Weekly Involvement



The Zen of Scalability



Achieving Scalability

▶ Scalability

▶ “The ability for workloads to be enlarged if needed.”

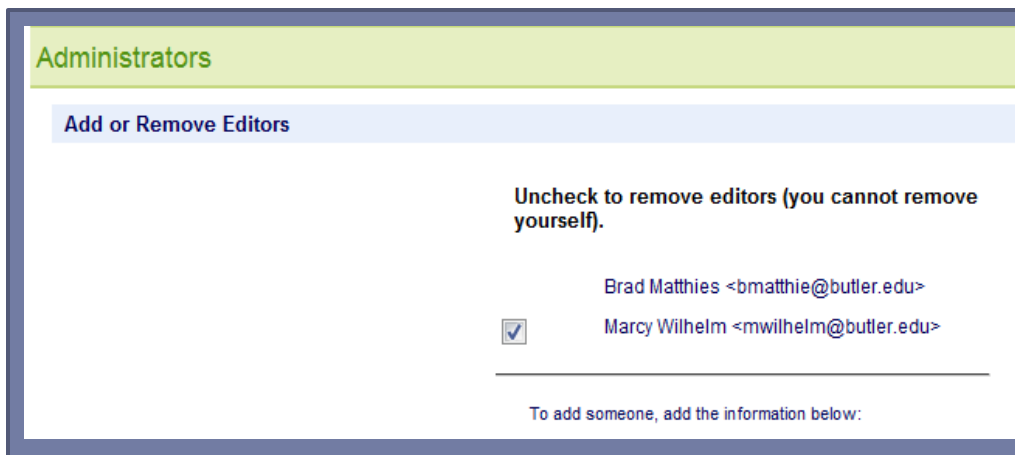
▶ Workflows built around “distributed workloads”

▶ Staff and students all trained on common tasks

▶ Adobe Acrobat Pro 9 (i.e. scanning and document editing)

▶ bepress interface and general workflow within the platform

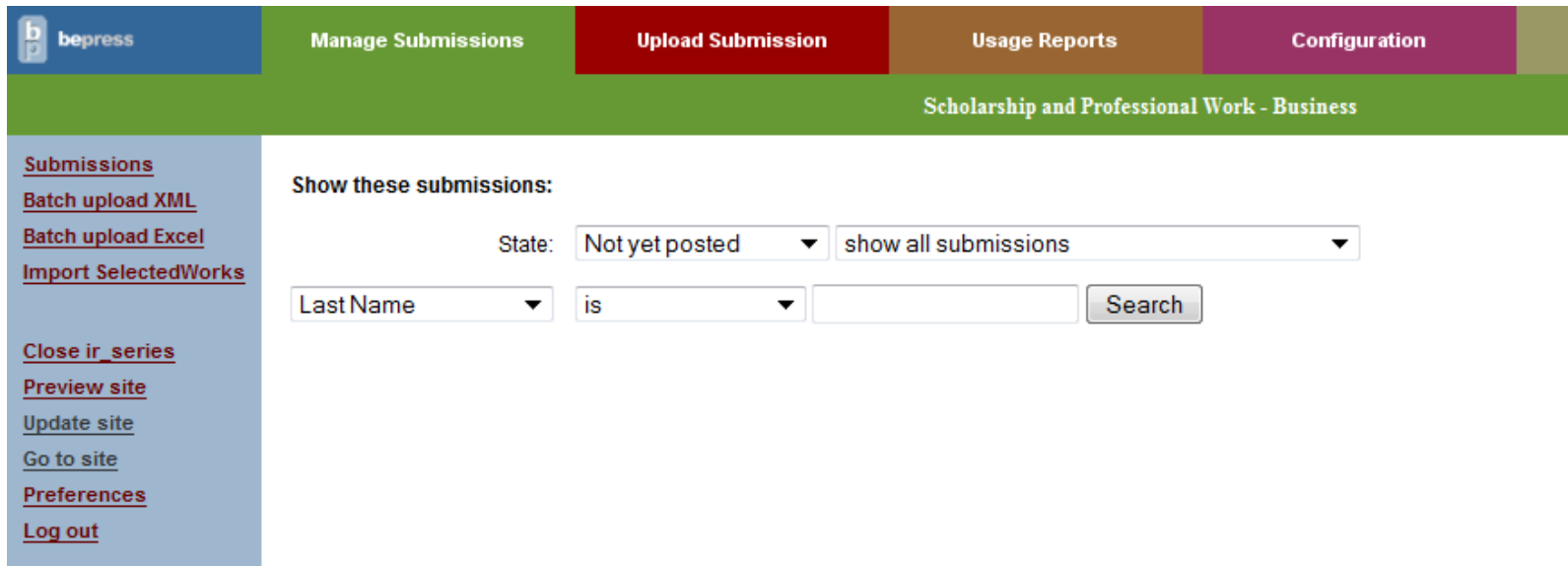
▶ Project manager assigns editors as needed



The screenshot shows a web interface for managing administrators. At the top, there is a green header with the word "Administrators". Below this is a light blue bar with the text "Add or Remove Editors". The main content area contains a message: "Uncheck to remove editors (you cannot remove yourself)." Below the message is a list of two editors: "Brad Matthies <bmatthie@butler.edu>" and "Marcy Wilhelm <mwilhelm@butler.edu>". The name "Marcy Wilhelm" has a checked checkbox to its left. At the bottom of the list, there is a horizontal line and the text "To add someone, add the information below:".

Achieving Scalability (continued)

- ▶ bepress web interface is designed for a distributed workload



The screenshot displays the bepress web interface. At the top, there is a navigation bar with five tabs: "bepress" (blue), "Manage Submissions" (green), "Upload Submission" (red), "Usage Reports" (brown), and "Configuration" (purple). Below the navigation bar is a green banner with the text "Scholarship and Professional Work - Business". On the left side, there is a blue sidebar with several links: "Submissions", "Batch upload XML", "Batch upload Excel", "Import SelectedWorks", "Close ir_series", "Preview site", "Update site", "Go to site", "Preferences", and "Log out". The main content area shows a search form with the following elements: "Show these submissions:", "State: Not yet posted" (dropdown), "show all submissions" (dropdown), "Last Name" (dropdown), "is" (dropdown), a text input field, and a "Search" button.

Achieving Scalability (continued)

- ▶ **Balancing Project Types – Terminal vs. Ongoing**
 - ▶ Terminal (i.e. those with foreseeable end allowing you to reallocate staff as needed)
 - ▶ Ceased university-owned publications
 - ▶ Small collections of papers or reports unique to your campus
 - ▶ University yearbooks
 - ▶ Ongoing (i.e. those that will need continual staff attention)
 - ▶ Active journals published by your university
 - ▶ Faculty contributions (generally scholarly papers)
 - ▶ Thesis projects (e.g. undergraduate honors, graduate, etc.)
 - ▶ Selected Works (only if you build pages on behalf of faculty)

Achieving Scalability (continued)

- ▶ **Some Additional Considerations (esp. for small libraries)**
 - ▶ **Avoid Scanning Altogether**
 - ▶ Back-scanning large runs of historical documents takes staff time.
 - ▶ bepress will auto-convert MS Word to PDF so look for projects that do not require scanning.
 - Student papers, faculty papers, conference proceedings, theses, etc.
 - ▶ **If you have to scan...**
 - ▶ There are no accepted standards for "archival" scanning, although there are plenty of guidelines.
 - ▶ General use: 300 dpi or less. (faculty contributions, administrative documents, etc.)
 - ▶ Archival quality: 400 – 600 dpi (historical documents).
 - ▶ **Recommendation: Purchase the best scanner you can afford**
 - ▶ Office grade scanners will suffice for most scanning work but it may slow down production.
 - ▶ Advise purchasing an archival quality scanner *only* if your institution has collections worthy of this scanning quality.
 - ▶ See [Paul Royster's paper](#) on scanning for more suggestions.



Concluding Thoughts For Small Libraries

- ▶ One librarian @ 8 hours per month could easily manage 2 – 3 small projects.

Another way to look at it:

Building Selected Works Pages On Behalf Of Faculty	Maintaining The Library Catalog (e.g. adding records, technological maintenance, troubleshooting, etc.)
1 FTE @ 8 hours per month	2 FTE @ 80 hours per month (Butler)
300 faculty w/10 contributions each = 3,000 objects <u>total</u>	4,598 records per year (Butler)
Completed in about a year	Never ends



Concluding Thoughts (continued)


1. Select projects that do not require scanning (i.e. balance your project types).
2. Your production rate will increase as you become comfortable with the bepress platform.
3. Your production rate will increase as you assess and refine your workflows.
4. Get another person involved! (e.g. librarian, library staff, student worker, intern, volunteer, etc.)



Questions?



For questions about this presentation, please e-mail me at:
bmatthie@butler.edu.

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