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ALCTS
2020 Exchange Virtual Conference (Zoom and ST dual output)
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>> Okay... welcome, everybody to day two of the ALCTS/LITA/LLAMA exchange. Before we begin, I want to offer a thank you to our presenters from Monday and working group members for working hard in the background during everything going on. I also want to thank our gold level sponsor, Emporia State University and their School of Library Information Management for supporting the EXCHANGE

We have a fantastic schedule of presenters today, including our virtual poster sessions and lightning rounds. Before we get to our schedule, I have a couple things to cover.

So... first off, on a -- there we go. On a somber note, one of our presenters, Joshua Lynch passed away last month. He was going to present this afternoon. He was a metadata services specialist at the University of Illinois. I'd like us all to pause for a moment to respect his passing.

Thank you for that. In light of the COVID-19 health crisis, the leadership decided to move the virtual forum -- or the core forum online to create a safe, interactive environment, accessible for all. The 2020 Core Forum will be scheduled for November 18th and 20th. Offering virtual hands-on activities and sessions with multiple tracts to help people hone in on particular problems, as well as cross-pollinating ideas from across different areas of librarianship. In light of this, the call for proposals has been extended to Friday, May 22nd and details can be found at HTTPK//forum.LITA.org/call-for-proposals. The call for proposals is still open for another couple weeks.

Now... onto the virtual poster sessions. I request that everybody visit our virtual poster hall at exchange2020.learningevents.org. Please convene back here by 12:45 eastern for our first full session presentation of the day.

Thank you.

>> Hi, everyone, welcome to today's session, day two. For those who are just joining us, we are in the start of the first session, but we are inviting participants to go to the website the exchange2020.learningtimesevents.org/virtual-posters. We'll reconvene in this room in about 35 minutes from now. So... please feel free to take the time to review the various poster sessions that are offered and... we will be back.

>> For participants just joining us. To clarify, we received e-mails from various participants. The poster sessions are not live sessions, we're giving you time to review the poster sessions that have been submitted. They're static documents that you can feel free to review at your leisure. And... you do need to be signed into the website in order to view them. Once you're there, you can feel free to take a look and review them and then have any discussions in the asynchronous format, using the forums, located beneath each respective poster session.

So... this is a time for you to, I suppose, self-direct your learning and experience and we'll come back with live sessions and further audio, over the course of the next, in... just, just over 30 minutes from now. So... feel free to enjoy the poster sessions. They're great. Thanks.

>> Well, welcome back, everybody to The Exchange and our first presentation for the day. Today... we're going to be seeing Recruiting From Retail presented by Susan Martin, Jessica Glomb, Tina Erikson, Max Maller and Philip Stefani

>> Welcome to Recruiting From Retail: The University of Chicago Library Acquisitions Department Experience. I'd like to introduce our panel today. We'll be presenting. I'm Susan Martin. Let me just put a little bit -- there we go. I'm Susan Martin. Until March of 2020, I was the head of Acquisitions at

the University of Chicago, but... beginning April 1st, I'm not chair of collection development and management

>> My name is Tina Erikson. I'm receiving and rapid cataloguing supervisor at University of Chicago Library

>> Hi, everyone, glad to be here today, my name is Jessica Glomb. I'm the Library Order Supervisor at the University of Chicago Library.

>> My name is Max Maller. I'm an assistant at the University of Chicago Library.

>> Philip? Are you there? We have a person on, who is called in and I don't know if he was still having some --

>> Can you hear me now?

>> Yes, we can, thank you. Good

>> Philip: I'm receiving and rapid cataloguing assistant at the University of Chicago Library.

>> Susan: Before we get into our presentation today, I'd like to provide a little background on the library and the department, so you can understand some context. The University of Chicago Library serves a diverse university community of faculty, staff, students and researchers and... we have over 11 million print volumes, 62,000 linear feed of archives and manuscripts and 153 terabytes of digital materials. The acquisitions section is one of four sections within a technical services department and we're located here, and you can see in the picture, at the Regenstein Library. Monographic orders, receiving and rapid cataloguing and electronic resources management. These three units handle, on an annual basis, over 40,000 firm and approval orders. They receive over 50,000 items, both paid and gift. And... manage over 3.8 million e-books and streaming media and over 190,000 active and inactive serial titles.

The section is staffed by two librarians, two supervisors, and 13 clerical staff. The clerical staff are unionized and members of local 743, the International Brotherhood of Teamsters.   Over the past two years acquisitions saw a number of staff retirements and turnover. This turnover is what's precipitated an excellent and timely opportunity to rethink the tasks and work of the units as well as the skills needed to build for the future.

The first of our interactive activities is a survey and we'd love to hear from you guys. Have the type of tasks and work in your library or department been asked to do changed significantly over the past two years? We'll give people a few minutes to respond. 2/3, that's what we discovered as well. The acquisitions work had changed drastically over a period of time. The acquisitions section at Chicago was print-focused and structured for that type of work flow when I arrived there. The work of the department was slowly changing and continuing to change, moving from a primarily print-based department that focused solely on acquiring and receiving to one that had a significant print component.

But... we added in the electronic resources unit and so... now it also incorporated electronic books, databases, media, datasets and emphasis within technical service for each department to conduct quality control and database cleanup on a regular basis, as well as maintaining and troubleshooting our electronic resources and database cleanup that entitles.

The departments work flows were becoming increasingly dynamic and complex. They overlapped the units. There was a greater need for staff, with strong management and critical thinking, high-level computer and customer service skills. And during the same time period, we saw the department had experienced a decrease in staffing levels, due to a reduction in workforce in 2016. Positions that were empty, were not filled. Now we faced additional turnover with the staff retirements.

Tasks needed to be automated in order to keep up with the volume and automation would rely heavily on reworking workstreams and paths, as well as introducing new technology, which needed higher level computer and more critical thinking skills. Skillsets that were, many times, lacking in this section. Print, though still strong at Chicago, was increasingly coupled with the need to understand electronic materials and their idiosyncrasies and needs. As positioned opens up, we knew it was the perfect time to look at what staff were currently asked to do and where the work was headed.

We would recruit for these future tasks and... future-needed skillsets. Two important pieces of the staffing puzzle were two supervisor vacancies and the ordering and receiving units.

Given the challenges of changing work and staff, or... the lack thereof, I needed unit supervisors who were strong, experienced managers, folks who could manage staff with a variety of skills and abilities and who could be effective recruiters and trainers for new and current staff, as well as folks who could look critically at work flows. I wanted candidates with strong customer service, focus, and skills, as these two positions liaised with vendors and library subject specialists. I knew that any library-specific skills could be taught. The candidates who possessed my highly desired skills came not from another library, but from retail management. Jessica and Tina will now speak about their experiences. Neither had library-specific knowledge outside being a library patron, but possessed the highly-desired soft skills of people management, customer service and critical thinking that are difficult to teach, but... were going to be crucial for the success of the department. Tina?

>> Tina: Hi, everyone.

>> Susan: We're going to be talking about managing -- are you all set?

>> Tina: Yes, I was a General Manager of a cafe, as well as retail store and so, I'm going to describe a little bit of my experience applying and transitioning over to the library.

So... coming in as a manager of a high-volume store, the retail-specific points, that were initially on the job description really stood out to me as things I knew I could excel at. They were people manager as well as managing invoices and processing materials.

So... I wanted to change job settings, but continue to use some of these skills I developed, but I developed them almost exclusively in retail and seeing that there were specific job requirements that I already knew that I could excel at, I wanted to take a risk and apply for this position. I was very used to working with diverse teams between four to eleven employees and two to eight students at a time. Susan was looking for a people manager, it was a standout phrase I felt confident about.

Also... regardless of my previous roles, the most-fulfilling aspect of any job I ever held has always been the ability to build meaningful relationships with the people I serve and that I work with. So... that was something I was very interested in pursuing further.

One of my strengths was a systems operator. I thrived on the challenge of keeping my inventory variance low and high volumes stored. That involved keeping meticulous records of invoices, recording exceptions, doing quality control, reaching out to vendors, as well as managing my work flows and training my team to ensure that we had an accurate count of all stock in our stores. That could easily translate to library acquisitions.

An avid reader, the thought of transitioning from tea to books, it was something I was eager to pursue.

>> Jessica: Hi, everyone. Most of my experience in retail comes from Whole Foods, actually, but I worked for a smaller chain in the Chicago area known as Now Foods. So... I have a background in high volume retail and procurement, mainly in natural products, and health-related types of products.

Also... a background with vendor and customer relations and... store management experience.

So... you might ask what drew me to a library acquisitions job?

Well... first and foremost, I thought that I would be placing orders to serve the community in a meaningful way. Something that, to me, was more meaningful than just getting vitamins onto a shelf that people didn't really need.

I developed an expertise in database ordering from my experience and with internal ordering systems that the company's used in retail. And... I was eager to keep on learning and to learn a new system in a new industry I cared deeply about. I think that the written word is one of the most-important things ever developed by humans and it's something that I've devoted a life-long passion to.

Ordering materials, though... is somewhat of a science, actually and... I thought that some of the same principles could be applied across industries. I was really glad to find out that they, in fact, could.

So... I was also excited to continue to till the soil of vendor and customer relations in a new field. And... getting to know the vendors and customers in the library industry has been wonderful. But... overall, it's been one of the most-rewarding parts of the job as a purchaser in my career. The more that you can foster an open and honest relationship with vendors and clients and tune into the idiosyncrasies of these relationships, the more fruitful your day-to-day procurement operations will be. And I found that to be true in retail and also true in the library field as well.

So... we're going to be moving on now, to talking about job descriptions in the libraries, but first we'll start with a survey.

>> Tina: For those who answered yes, are library specific requirements required qualifications for the job? I'll give you guys a minute or two to answer that and we'll take a look at the results.

>> Susan: Let's take a look at the results now. Wow... that's really interesting. So there are very -- 89% of you said for non-librarian job descriptions there, are library-specific requirements where only 11% said no.

And for those who answered yes, are those library desired or required? Yeah... the bulk of them, 74% said desired qualifications and only 26% indicated that they were absolutely required. That's an interesting poll.

We had started to -- we're going to be talking about our, what we've done for retooling job descriptions. Many were required and job-specific skills and requirements.

>> Jessica: Crafting a job description for potential candidates can either attract a strong, diverse pool, or... it can alienate potential applicants, as we've noticed through our experience.

So... when hiring outside of the library, we realize that we would need to organize and prioritize certain job responsibilities and skills differently in our job descriptions, as they related to the changing work in our units.

So... in order to do this, this involved several key points of focus to retooling our job descriptions.

We had to reassess the type of language used and we had to manage our expectations and start to think realistically about which skills were preferred, strongly preferred, and then required. For a clerical position. And we also had to focus on which technical skills could be taught and then those soft skills that we were really looking for that would be more difficult to teach on the job.

So... the next slide, we'll talk more about the language.

>> Tina: We included the following language. It's been pulled directly from real job descriptions that we posted in the past. We intentionally broadened some language to attract more diverse talent from across many different industries. You'll see some examples here. We'll go into a bit more detail. The first one we have is assists with training and management of students, including hiring, training, behavioral and performance management

This qualification was listed for our principal assistant positions who work with student workers. What we're really looking for is for applicants to be able to demonstrate the ability to train or lead others in some professional capacity. While not necessarily requiring that our applicant has "supervised the work of students" in a library. It was more important that we saw some of that broader management or leadership abilities.

Second... we have checks and results invoices working with payments and monographic order stats to resolve problems. This was for a job posting in my unit. We wanted to ensure our staff would be capable of interacting across units. They have some experience with handling in-coming physical materials. For example... Philip's experience with this was in a video store, not in a library. So... we thought it was an easily transferrable skill he possessed and able to convey to us.

Thirdly, we have high priority and complex materials, this language was used for searches for higher level specialist roles. This language covers a range of industries experience. It's left intentionally broad, but... the main focus is that an ideal applicant would be able to demonstrate attention to detail and a sense of urgency, as well as an ability to adapt in a dynamic environment.

>> Philip: Max and I are going to be discussing things that drew us from our retail jobs to working at the library. And why we thought we might be good fits for working there.

From my perspective, when I saw the posting, I jumped at the opportunity to apply. It seemed like the great way to acquire the skills I had from working at a video store. Most of all, I was excited by the prospect of working with materials in multiple foreign languages. I had experience with two European languages and also wanted to push myself with new languages. This unit's high volume intake of materials also appealed to my abilities to work in a complex and busy environment. The job posting also mentioned more technical aspects of library work, including the use of mark language and OCLC interface. Things I knew about at the time, but it excited me because of the skills I'd be able to learn surrounding their use.

>> Max: I just want to say before I start, I've been looking at the conversation in the chat about the term soft skills, I think it's an interesting discussion. I'd like to hear more about that during the Q&A

After selling books hand to hand with an independent retailer in Chicago's High Park neighborhood for two plus years. Part of me saw moving to library work as a routine transition across sectors. As I investigating the position further, I noticed key differences. The language of library acquisitions was about permanence. Books find their permanent home in the stacks. Access to digital resources, except in special cases, is permanent and unlimited. Being part of a mandate that extended until the end of time had a great appeal for me, especially after all the hours I spent in the business where things tend to be transitory. I loved working in retail, I loved our customers, including the many odd balls who would wander in. I liked my employee discount, but... it was clear to me that the library served a higher purpose. I was eager to apply my experience to what's known as our "permanent collection."

>> Jessica: All right... we, on one side of the coin, were talking about job description language and now we're going to flip to the other side of that and talk about decoding those resumes that start coming in from your excellently-worded job description.

Okay, so... we know that resume language doesn't always -- whoop -- go back a slide. I think... one more -- okay... we're back. All right, so... as we have experienced, resume language doesn't always match up to how we described the needed skills. People describe things differently than the way we word them in a very structured job description.

But the terminology used in different industries also varies from library speak.

So... it's crucial that when we learn to decode non-library language, in order to match up the demonstrated skills from our candidates' resumes. We're going to test this out with a quick and easy game.

On this slide, you'll see two columns. In column one, there's a candidate who applied to the library and resume skills they listed. Column two, there's a skill needed for an open position at your library. Everyone can follow along with your handouts to choose which skill and resume skill can be matched together. If you don't have a handout, you can just jot it down somewhere for yourself and we'll go over the results later.

Here we go.

>> Susan: Hopefully everyone was able to get the handouts. If not, they might be under a different link on the website. I'm going to move this forward because I'm mindful of time to the answers for this. There we go.

>> Jessica: We can see how everyone did with the game. If you got them all right... give yourself a pat on the back. If not... you know... we can still see that there are a lot of skills that are really transferrable from these industries and... that's a really great thing.

>> Tina: Have you recently attempted to recruit for a position, but have the search fail?

>> Susan: We're asking this because we have had searches that were wildly successful and we have also, unfortunately, have had them fail in the past. And we are always looking to make sure and try to mitigate the chances of it failing and having to go through all of the library and university to get it reposted. I'm sure we're not alone in that. -- I'd love to know some of the hints from the 48% that didn't fail, that'd be great.

>> Tina: Now that we'll be moving into our interview section, we have a couple tips that we found to be really helpful for practicing a successful interview experience.

So... some of the points are to really ask the questions that will get you the answers that you really want. It seems pretty simple enough, but... it is worth taking a look at every interview question with this in mind.

So... what do you really want to know about your candidate? Secondly, interviews are an opportunity to let candidates showcase the skills that they do have, but not necessarily at the expense of ignoring skills they don't.

So... for instance, if you already know that none of your candidates have a library background... you might want to take your question about mark or bit frame and include it as a follow-up, but prioritize another skillset in the main question. Create a master list of sample questions, pulling from different industries and organize them based on what kind of skills, experience they're able to provide. We're providing a list of acquisitions, we're always on the lookout for additional questions and we remove questions that we found out didn't work out so well.

>> Philip: And... Max and I are going to be discussing our experience of transferring our skills from retail to our new jobs working at the library.

So... for me, from my previous work as an undergraduate and working at the movie store in Chicago, I was able to transfer my comfort and knowledge of spreadsheets, especially organizing bibliographic material across forms. Both places are patron-based lending learning environments. I found much continuity in my work in that sense. Something that wasn't transferrable for me was my extensive customer service experience from the video store and other work. At U Chicago, I didn't work directly with the library's users.

>> Max: Okay... they say never to judge a book by its cover. Whoever coined that expression never worked in a used bookstore. I spent the majority of my shift each day judging books by their covers, assessing condition issues, looking at publication data, skimming blurbs for keywords that would tell me whether a book would sell or not and what section of the store it'd live in. My former employer used to tell his staff that the most-important page of any book, as far as we were concerned, was the one overleaked from the title page. It had all the title information on it. Did the matrix number have a five in it? I grew speedy at sizing up any book in the world according to these criteria within a couple seconds. Those skills served me at the library. Incoming titles and requests

come through our channels with bear bones information provided as to what it is and where to go. I'm proud to carry these skills into the library arena where they serve me all the time.

Interaction with customers, over-the-counter, that's been less-useful to me at the library.

>> Tina: Now that you retooled job descriptions, conducted interviews and hopefully found a perfect candidate, you must onboard your new hire.

We developed best practices to help set our new hires up for success from day one. Some of these, some of these things we found are successful are to do library-specific training and development. So... one of the main learning curves is specific software organization, market structure and OCLC. We had great success using the Elects Fundamentals Core Series providing a practical and theoretical introduction to overview and department-specific work. Enable the new hire to gain all-important context for their work.

Secondly, be patient and understanding. Your new hire will be eager to learn the ropes, but you should be prepared to be available to explain library-specific topics that will be new to them. Have up to date, written documentation that all staff members can refer to. With so much turnover, this is something that we found to be particularly challenging, especially in my unit with some people that have been there 25 years and some fresh out of undergrad. Making sure all that documentation is accurate is crucial.

Finally, encourage collaboration. We have experienced so much success from reaching out to more-seasoned library Veterans to conduct brief tutorials on library practices, such as advanced serial searches, with advanced serials management department and OCLC training from copy cataloguing. It's been really great.

>> Susan: We're almost to the end and I want to make sure we have time for questions. We'll take questions privately and through the forum page as well, under our nice little section. Many people think if something worked yesterday and is still working today, that it will work tomorrow and that's wrong.

This is a favorite quote of mine, I think that, just like chess grand masters and players who are always examining and improving their strategies, we need to continually look back over our processes and adapt them based on experienced technology and the environment.

For example... how we recruit, hire, and onboard and train staff will certainly need to be re-examined in the new normal brought on by the COVID-19 crisis.

The University of Chicago library closed to the public and all staff were moved to remote work from home on March 17th. On March 23rd, receiving and rapid cataloguing welcomed a new staff member to the unit. That position had been completely redesigned and almost had to be completely redesigned again to adapt to the remote work. I changed positions during this time and relocated from Chicago to Tennessee. I got to spend one day in the office and it was long enough to fill out HR work. My interactions with my staff have all been via Zoom. I find myself leading a department -- that I have yet to meet any of my direct reports or indirect reports. My onboarding experience has been relatively positive, but could be improved upon. Many institutions had to put recruitment and onboarding on hold this past spring, due to COVID. However... will that be sustainable as stay at home directives linger much longer or happen again in the future?

Before we go... we'd like to do two more polls before we take questions. Did your library onboard any new hires during the work from home period due to COVID-19? Do you plan on exploring remote recruitment onboarding and training process due to COVID-19. We'll give you a couple seconds to answer the question and take a look at the results then. And then we'll have time for questions. Can we have the results of the polls, please? 40% still said they onboarded new hires. 60 didn't. And... 55% are not sure if they're going to explore. 24% said yes. Yes... I guess that would probably be dependent on your institution, or your -- the policy set by the city or your -- the higher institution you belong to. Still... 60% didn't hire, but 40 did. That's really great. Very interesting.

Well... thank you so much for joining us today. And... feel free to contact us, our contact information is here. I know that this presentation, the slides will be available afterwards, so... feel free to reach out to us, personally. And we'll take some questions.

>> Jessica: A question I could read here that was published here in the Q&A section... did we cover where to reach out to the fresh pool? Techniques for recruitment? Any suggestions on that?

>> Susan: I know we were working with our library's HR on trying to get the word out, widely. Beyond sort of the library circle. I think this is something that, I know that we have struggled with. We were sort of comfortable of knowing all of the different Listservs that we put out the positions. Our am HR had some local Listservs that they put out that were more based -- a couple that were equity, diversity and inclusive-based. There were a few that were based, specifically in Chicago, for that, but... that's always something that I think we struggled with and it would be great to be able to get it out, beyond, sort of, the regular realm of folks to get it into a more diverse pool

We also, sort of benefitted from having that indeed web crawler and scraper take the position off and I know that some of the folks that have applied from non-library backgrounds, who were also, had really good skills, came from seeing it on Indeed.

>> Okay... good answer. Another question from Jesse Lambertson. Thinking about soft skills and hiring, what better, human-oriented skills would you like to see in cataloger's metadata colleagues?

>> Susan: Hi, Jesse, thanks for your question. That's really interesting. About soft skills and people orientation. I'd say that anything we were looking for in acquisitions, you might want to look at for catalogers and metadata. That's anyone with a customer service background. If they've done any instant in customer service, whether it's been on a phone, in a phone bank or... across the counter in a retail store, they're going to have those people skills that you're going to -- that will be able to translate over, no matter where they are in the library. Whether dealing with a vendor or client or dealing with their colleagues sitting in the next cubicle. I'd look for those kinds of things for that. I think that that's really important.

>> I can respond to one of the other questions in the Q&A, what was the -- from Jennifer Dougherty, what was the biggest challenge from those transitioning from non-library settings to

the library setting? Answering from my own experience... I think the biggest challenge was seeing how my new role fit into a larger infrastructure. Parts of which were sort of invisible to me and that wasn't a short coming of the library, it was just how things work. In a large lending institution. At the buck store, I could see every -- all the moving parts. I had a hand in most of them, but... figuring out how my own tasks Fu any time a larger work flow took a lot of adjusting. I had a lot of support from supervisors and colleagues on how to do that. That was the big leap for me from retail to working in the library. I don't know if others want to respond to to that?

>> Tina: Moving from a leadership role to another leadership role, that was a challenge to me when I first started. Organizing work flows and how they fit in the bigger picture. The example I'm thinking of is assigning my unit based on print approval work flow, versus firm orders. Really learning the timing for assigning out materials and that requires some understanding of library acquisitions and it, it, you know... has a lot to do with language and has a lot to do with, with that library world that is -- I don't have to think about that in retail. Approvals and firm orders and how to time materials was something that forced me to examine how I even structure my week as a supervisor, how I can assign things out and... my unit staff, structuring there, work days and work weeks as well.

>> Jessica: I think that's an interesting question and all of us could add something, but... the most, I think... I wouldn't call it challenging, but... like, eye-opening thing to me, coming from like, a mainly -- really corporate-driven background to a library and to doing a real public service for the community, at large, not just for this generation or this day or fiscal year, but... for generations to come. That transition in transitioning the mindset and work flow was, I think... eye-opening and really, a good thing. My way of thinking about orders and claiming things, for example... you know... coming from a corporate retail background was well... you know, if we haven't gotten it, for over a year... we'll just write it off, right? Why are we spending the time going after you know... this, this volume that we haven't gotten for a couple years because it hasn't been published?

Learning and understanding that you're not just developing, you know... like a collection of things to be sold to contribute to a bottom line in the year, but... actually, a collection that's meant to develop, you know... a body of knowledge for generations to come was really great.

>> Susan: Thanks, that's all the time we have.

>> Frank: Thank you very much. We're now going to a ten-minute break. Thank you to our presenters. That was a fabulous presentation. If we weren't able to get to your questions, ask them on the discussion forums on the Learning Times site. We'll reconvene at 35 past the hour for our next session. Thank you and have a good break, everybody.

>> Thank you, everyone

>> Thanks, bye

>> Thank you.

[Break].

>> Good day, everyone, I'm Michael. I want to welcome Laura March and Amelia Gibson.

>> Laura: Wonderful, thank you, all. Welcome to our presentation. We're here to talk about building and maintaining inclusive spaces online. Hopefully you're here to learn about purposeful design and purposeful inclusion. If you haven't already, take the poll you see on your screen. There are two different questions, one focuses on institutions, versus you, individually. We'll discuss some of the responses at the end of our session. Direct links are available for you online at go.UNC.edu/studyexchange. Feel free to reach out to me on Twitter. My background is in accessible web design and instructional design, particularly helping professors transition to online learning. I'm interested in topics around intersection of technology, creativity at libraries and the rural institutions. I'm part part of The Equity, Data and Communication Lab at Chapel Hill. Amelia can be reached at Chapel Hill. Her primary research interests focus on ways information and data are used by and against marginalized communities, health and wellness, and communities of color.

After this introduction, Amelia will speak with you and I'll go over strategies. We'll finish up with time for Q&A.

Wonderful... thank you all for participating in that poll. I'll close it for now. Amelia, the floor is yours. Are you able to connect your audio?

>> Amelia: I think so, can you hear me?

>> Yes.

>> Amelia: Okay... great. Can you go to the next slide? Okay... thanks. So... when planning any program that involves technology, there are both institutional logistics that have to be considered and technological logistics to work out. Some of those things overlap. Some of you, I'm looking at the poll, it looks like a lot of you feel like your institutions and you, personally, have done this work to build inclusive environments. You might be familiar with some of these institutional perspectives, but... I'm going to go into a little bit of detail if we have a moment today. I'm going to touch quickly on how to think about some of these institutional logistics and Laura will focus on the tech for today.

Before that, we want to give you ideas of the kinds of programs this might apply to. These programs are great for folks that might not come into the building for a number of reasons. Many times that includes people with disabilities, right? This might be a good list for libraries that are trying to reach out to folks during quarantine or isolation, due to COVID. There are a number of people who are immuno compromised, might have extreme anxiety and other disabilities that keep them from coming into the library building.

So... doing these kinds of programs are good for reaching those types of people, in addition to everyone, you know... we're talking about inclusive programming, not just programming for people with disabilities, special or separate programs, right? And doing these kinds of programs, in my opinion, helps make the experience better for everyone. Doing them well, makes the experience better for everyone. This is something that we see a lot of the time when we talk about any kind of inclusive programming. Works well for people with disabilities or disabled people, generally helps everyone.

Online story times, we've seen a lot of those come out of libraries. A lot of literature-related spaces recently. Ask Me Anything sessions for librarians and community members, online book clubs, watch parties, online sessions that answer some of the more-popular seasonal questions that the library staff might get.

Yeah... Amy is saying, remember closed captioning -- we'll get to that, right? Also... speaking of that -- consider providing information -- any information or any programming that you do consider providing it in multiple formats, right? Closed captioning is a form of text format. If your program, your content is provided in a video format -- a visual format, also consider providing access to it in written text format as well. If your program is provide in text format, considering providing audio narration of that text. This is one of the basic tenants of Universal Design for Learning. Provide any content that you get in multiple formats, okay?

So... next slide. So... with most program planning, you need to think about division of labor and for those who do programming in your libraries, you're accustomed to thinking about that on the fly or naturally, right? When you start out doing online programming that happens online. You need to do this very explicitly to avoid overlooking important parts of your planning.

So... for example, figuring out who has control over what elements of the library's presence tends to save time later on. Makes things easier on the back end. Typically... library staff have to request support from the city or staff IT staff to do anything to the website. Sometimes there's a specific person who is assigned to do social media for the library. And so... think about the ways that, the work that you're doing, if the program, itself happens online. Might be different, right? Next slide...

This is one example of a framework for planning an online event and division of labor. It may look slightly different depending on your content. If you were still a librarian, this might look different in terms of, in terms of being able to, needing to separate this -- the job functions to different people. But... here, we have programming, administration, advertising, in some systems, this person isn't often connected to the programming themselves, but they do have regular access to the library's social media. You have to think about what it looks like if the program is conducted using that social media account. What the permissions might look like. Technology... same question. Right? How does this look different if the event, itself; using the library's technology. I encourage having community representation and planning, especially when you're talking about being inclusive in terms of disability, right? A lot of times we have programs planned according to the expressed desires of people who feel comfortable speaking to the library staff and to the librarians and those are not always people from marginalized communities, right? And security. This might look a little different in a chat room or Zoom than it does in a physical space. What does it mean to have a security person in an online, open, public forum that, that anyone can access, right? What does that -- how -- what might that entail? Okay?

Next slide.

So... here, a few questions for you to consider. What resources or support does each person need? Who normally manages these resources and what might that mean in terms of responsibility and access to the library's web space? What does it mean to share that access or responsibility? Who is currently allowed to represent the library online? Does that current structure prevent the library staff from interacting with the community on the web? It might be possible to make multiple levels or accounts. You might have an official library count and a less-official account for online programs or story times. Do these people have the training or the, the time that they need to do this work in an inclusive way? And to do this remotely? And if not, how can they get that support?

Then, what happens if there's conflicts between institutions information values and the information values of the community. Right? Or the people -- especially people with disabilities in the community. Who is responsible for gathering information about what the community needs? How to implement that? And who deals with community feedback, right? All of these are institutional planning points that should happen when you're doing that kind of work. Next slide?

So... one of the things I hear a lot holds library staff back from creating inclusive programming is reliance on third party software or platforms that don't support accessibility.

This is my call to folks on the management side -- push for the -- at the very least, basic accessibility standards, right? Ask how, ask your, your vendors how to use some of their basic accessibility functions. Push for, for content, accessibility guidelines, the minimum, the very least, the minimum compliance with WCAG, ADA, Section 508 and other applicable laws. In your licensing agreements, ask for alternate formats for people who need them. If it's not available, ask why.

Scott is saying whole communities and consortia need to push vendors harder.

It doesn't happen if vendors aren't pushed.

The final thing I have to say is set clear guidelines for inclusive programming that all staff need. If there's one thing to take away from this portion of the presentation, is that building inclusive programs is not just the job of your children's librarian. I hear that a lot. When I ask who in your library works on accessible inclusive programming, people say it's the children's librarian. It's not the job of just the one staff member who has a special interest in working with disabled patrons, it's everybody's job, right?

So... staff can represent the library in person, but also on social media or online should have clear guidelines for using that technology. Do you use identity-first language? Do you say disabled person? Do you say autistic person? Different communities in different places have different preferences, being aware of that, having common guidelines across the library is helpful.

People should be aware about things like photo-captioning, text appropriate at reading levels, web developers should have content on web accessibility guidelines and one thing that we, seems really small, but becomes very important if you need to use screen readers, et cetera... is that all staff who post documents, including PDFs, especially PDFs, should ensure they run internal accessibility chokes documents that are published by the library, right?

They should be ensure that videos are captioned and whenever possible, that transcripts are provided. Right?

So... my takeaway for my presentation portion is that, is the idea that accessibility isn't something that's ever finished, right? Sometimes people try, things aren't perfect, they get frustrated and give up. Think, don't think about accessibility as something you do one time or included, the same way, something you do one time and it's done. It's an ongoing process. And then, software updates and changes, as your community changes and grows, you need to continue to communicate with people and make sure that your strategies evolve and that your programs remain inclusive. Thank you.

>> Laura: Thanks, Amelia. As promised, here are a few technological strategies to keep in mind as you're thinking about improving online inclusion. I'll keep this quick, but... feel free to review our online slides and reach out with any other questions. First up, making use of accessibility tools within social media.

So... as Amelia shared and as we can see, if you click on the closed captions button here... we're currently shifting to virtual events to accommodate closures during the pandemic or, are already part of our virtual events here. In Zoom, we could have live captioning without much hassle. It has native sign language interpretation features too. Facebook and YouTube are working on these native services, they're rolling them out as accounts -- to different accounts with different amount of [indiscernible] as we speak. If you haven't gotten this on your Facebook or YouTube account or hosting live video event is happening for your institution on Twitter, you'll need to use a third party software system to do that captioning.

So... still on social media for a little bit, many of us know we need to add alternative text to images for people who use screen readers on the website. If you're seeing that, need a refresher or more ideas to write. I'll walk you through this.

You may have seen image descriptions like this inside Twitter posts, which really started in response to the platform not accommodating alt text at all. I heard that old phones don't have that alt text functionality. Let me know yours doesn't. I was asked to give the link again. Sure, it's at the bottom.

Talking about alt text on Twitter. So... again, this has evolved from Twitter not accommodating alt text at all. Now that they do -- if this had alt text, it'd have a button over here saying alt. Here's how you add that. First you have to update your settings, go into accessibility and then into this vision area over here and allow that to be checked. And once that button is selected, an add description area pops up once you've uploaded an image. They're also testing some AI here and it will auto create some crazy descriptions for you, whether or not you decide to have alt text. It might be good to see what they're describing your image as, compared to what the image actually is.

Interestingly enough, on Facebook, you don't have to tux on any extra settings, it's inside an options link that will show on your image, see that very faint options sign and within the submenu, you can change alt text over here. If you forget to do this, at all, you can just Google it, how to add alt text on Facebook or Twitter and so many options will pop up for you as well.

Next up is making sure that your website's content is organized. And this means using a contemporary hierarchical structure. Meaning using paragraph tags instead of line breaks and perhaps, even more importantly, making sure that your headers are nested correctly.

So... any time you're using an H3 tag, it must be directed after an H2 tag. For people using screen readers, experiencing out of order headings or lists would be like asking a sighted reader to navigate a physical book with no page numbers.

Under that organizational umbrella, ensure your layout is unresponsive. I'd consider using percents, instead of pixel widths, you can see why here. Similarly, making sure to separate your content and page style. More-specifically, consider using progressive enhancement. On this slide, you can see the three different layers of building out a navigation system. The first step or layer uses HTML, that's all the way on the left. And... that would be useful for somebody using a screen reader or mobile phone that has limited functionality, like that old BlackBerry we're seeing in the comments. You can change the order of pages by putting a number into that form.

The next layer or adding CSS and styles to make it prettier in the middle, it does the same thing. It makes it prettier, but doesn't change the functionality. The next step to the right would add in JavaScript or HTML5 which allows users to drag and drop pages in a different order. Users who cannot do that drag and drop, have the functionality of those who can. It's hidden underneath the visual editor, get to interact with that content -- still be able to do whatever they can that you're asking them to do, like changing navigation structure, it's just underneath these other layers that people with additional functionality are able to get to.

And here's what the code looks like on the back end. It's starting simple, moving to complex, but... really without removing that functionality of the original foundation.

Another area to doublecheck is making sure that your text is easy to read and not an image file. On the easy to read point, Microsoft Word and even Outlook have been offering automated readability checkers to check the grade level of your written content. Again... there's how-to on the slides as well.

Checking your color contrast, a tool to use is WebAIM's color contrast checker and it allows you to see if the color combinations pass different WCAG levels. As librarians, I'm sure you know how to do optical character recognition inside your PDFs, but... don't forget to clean up issues or mistakes. You can do that straight through Adobe Acrobat. Those how-to links are available in the slides as well.

So... moving on to descriptive linking... this is something that's not currently happening in Zoom, which is why we have to pace those ugly, long URLs. They're on it -- I've been assured. As the name implies, hyper links should describe where it's being pointed. Constantly linking the words click here, not good practice. Much harder to figure out where you're going to go. Users aren't clicking anything, they're tabbing on their phones or hitting enter on their keyboards. Similarly, having a screen reader waste time reading all those long URLs is unappealing for of those us who are sighted. Hopefully we'll get this fixed too.

One quick note about creasing accessible forms, one of the major errors caught about automated checkers. Don't forget about image-based CAPTCHA codes. Think of users with dyslexia. There's a write-up about the inaccessibility of CAPTCHA forums and visual turning tests on the web.

So... now on to evaluating your work. Not only should you check your content using an automated accessibility checker, but... also ask real users for their feedback. So... a website can pass all the automated tests available, but still be confusing or unuseable to your actual users. This is another reason it's important to build relationships and listen to disabled community members.

So... with all that being said, at the bear minimum, you should be checking your work. I like to go through the basic of reviewing that together and do it yourself with an automated accessibility checker. Let's run your websites through WebAIM. Pop open another browser, head to wave.WebAIM.org. I'll give an example on the next slide. Take some notes of your results and share them in our chat. We're at wave.WebAIM.org. And I put in the UNC library's website. You can see the contrast errors are happening on our library hours page. With the gray text, you can barely see it says closed there. Let's take, maybe... two minutes and try it yourselves. Go to wave.WebAIM.org and share your results with us in the chat.

Anybody see any major surprises pop up? You can use your own school if you'd like or... maybe another institution you think is a really good job or another institution that does a really poor job. 20 contrast errors. Oh no. Can you tell, right away, what those are? Were there particular colors?

>> Interesting with the emergency announcements on COVID-19. I've seen how institutions have chosen to put a pop-up or... use the cookie functionality. I know in European websites where you have to have the accepting cookie functionality as part of your website. People are changing that into COVID-19 language.

Again... things to think about, if you actually want to use that that way or think of other solutions.

Interesting, a lot of low-contrast errors coming from university of color usage. So... if you see back in here... I was testing our UNC Carolina blue, versus just a couple degrees darker into that -- really in blue -- there's a big difference on what can pass and what can't pass. Evelyn found some structural errors. That's talking about those out of line headings. Again... thinking about it, like... unordered page numbers in the physical book. Interesting. And dealings to social media, some null or empty alt text. Very interesting. Congratulations for Susan, with no errors on her page. Same with Mary Ann. Bethany asked about area. Area is -- I know I've seen it used in WordPress pages. It's a plug-in-themed back end area. Oh no... sorry to hear that, Debra. And an empty button. Okay... thank you all, for doing that. I'd like to learn more about what you will are seeing. Thank you so much for coming to our presentation today. I'm cognizant of the time, but we talked about purposeful design and use of digital resources to improve online inclusion. We're happy to take questions you have about the automated accessibility checker, ideas for remote programming or anything else you see like to talk about. Thank you so much.

>> Thank you, Laura and Dr. Gibson. If there's a question, please feel it into the chat box and Laura and Dr. Gibson are free to answer those questions.

>> Laura: I see our Bitly isn't in here, let me add that right now.

Interestingly, now, inside, inside PowerPoint and inside Google Slides, we have the ability to add alt text. Once you're hovered over here -- you can see I have the logos in here. Or... something in for... this forms, it may be alt text, describing what you'd want people to actually take away from this image.

>> Amelia: There are a lot of accessibility settings on your own computer you can use for screen reading, but there are also free screen readers you can download. It's helpful to test your documents and your sites using a screen reader. It takes a little bit of practice to learn how to do it, but... once you do, it's easy to see why it's important to be able to tab through things. Why it's important to use your headers and all of that. That's a really great way to test your -- check your work.

>> Is there any comment on the approach to recruiting people with accessibility needs to participate in research or testing? That depends on your community. I'd say, whenever you can, compensate people for their time, but... also, including people on your board who have disabilities is helpful and giving them the same consideration that we give everyone else in terms of their ability to influence the library's programming. So... yes. One thing that I think is a pet peeve though is just assuming that people have nothing to do and they'd be able to spend lots of time on the library website without any recognition or compensation. Just be mindful of that

>> Laura: Our favorite question from Ellen about events on doing hybrid events. So... Amelia, would you like to share what you did as host of our class?

>> Amelia: I ran a course -- was it last spring? Disability informatics course was a hybrid course at UNC. It was a face-to-face class every week, but... we did an open Zoom -- it wasn't really a forum, but we broadcast the lectures

on Zoom and took questions. What it really took was two people for, for a hybrid event. So... be mindful that you will probably need someone to run the program in-person and another person to run the program -- or to manage the program online. It's not something that is easily and well-done by one person.

We had live captioning, so... that's something that does take a little bit of money, I think, but... not as much as you might think. And... as Laura, I think, mentioned, there's always the option, if you absolutely cannot afford to do live captioning, there's also the option of doing captioning after the fact, with programs like Otter or... you know... there are a number of web -- there's a number of online captioners that will give you a transcript that you'd have to clean up.

>> Laura: Those are all on slide 15. You can see what those options are.

I think that facilitating an event that is hybrid takes a certain skill. You need to have somebody that is facilitating the in-person, versus somebody that is facilitating the online version. So... asking questions and getting people involved, so they're not just passively taking all the information. We're doing a great job on this back channel and... having one person be expected to read all the back channel, while also, helping everybody in a physical room. It's too overwhelming, but... it's lovely in having those two facilitators.

>> Amelia: Christopher was asking if we seek enter of disability tools used by site visitors? It's part of the programming, right? You're making it available to the public, it should be available to as much of the public as possible

>> Laura: I tend to take like a Universal Design approach to that so that -- I'm not necessarily looking for specific users that have the turn on certain settings. For example... I have the chosed captioning on, on my Netflix account because... I, obviously, can't concentrate enough, especially if I'm listening to people with different accents. I like to have those closed captions on. I wonder if you can go inside the YouTube studio and see how many people do that. That'd be interesting to see but... for putting in alt tags or using other methods... I really just make sure to have that testing with actual users that are going to be using these in the site.

There's a reference to sign language help in Zoom. If I can escape out of here... if you go into your -- like your institutional Zoom settings. You might be able to see... hopefully this doesn't broadcast everything for you. Inside your settings, language interpretation here. And that's in the in-meeting advanced. You can turn on the closed captioning and you can also turn on language interpretations, save the captions, I believe there was sign language itself, ASL... maybe that hasn't been rolled out into my institution yet. But... those look like video inside video options that you see in other Zoom contexts.

I do hope there'll be more acceptance of online events post pandemic. I think they're lovely. Here in North Carolina and I didn't have to buy a ticket to go to any, anyplace or... pay for a hotel room, which is difficult on my graduate student budget and I think they can be just as engaging, if not more, on the back channel than an in-person event. So... I do hope.

>> Amelia: Thank you. YouTube studio does allow you to see how many people in your audience turned on captioning or subtitles and will break it down by language selected.

>> Only 48 degrees -- no... I think it's in the mid-70s here.

>> Yeah... mid-70s outside. [laughter]

>> I'm glad to hear, Bethany, you're enjoying your first online conference. I think that might be it for us. We do want to thank you all, again, please do get in touch if you have any other questions.

>> Amelia: Thank you.

>> Thank you, Laura and Dr. Gibson. It was informative and useful presentation, thank you, again.

Remember, if you wish to continue the discussion, please go to the discussion rooms or reach out directly to our panelists.

>> Everyone, we'll be switching over shortly to our next presentation. Please keep, stay tuned for that one. We'll begin shortly.

Thank you.

>> Welcome back, everyone. Hope, I hope you are enjoying the conference as much as I am. Now I'd like to welcome Emily

Nimsakont. Cataloguing and metadata trainer with Amigos Library Services

>> Emily: Thank you for being here for the presentation today. I'm excited to be here presenting for the EXCHANGE. I hope you all are excited to learn about today's topic, documenting library work. As you can tell from my title, I'm from the cataloguing and touchable services side of library work. I worked for a state library, academic library and doing asset management for a corporation. I've gotten kind of -- I started approaching documentation from the tech services end of things, but... the more I've gotten into it and presenting on it, the more I realize is this applicable to all areas of library work. I've broadened my scope here and we'll be talking about different ways in which documenting our work is important. I want to talk about why we need documentation. Why is this necessary? So we don't look like this person when we're trying to remember how to do a task that we only do once a month or once a quarter or even once a year. Documentation is really important for kind of, streamlining work of all types.

There are a couple more specific snare years of why documentation is important. One of them is, you might be in a situation where you have multiple people doing the same work. You have different reference librarians who standardize how they record their reference statistics or student workers who work the circulation desk, checking out items in different ways and your electronics kits are getting messed up when they're checked back in.

So... any situation where you have lots of different people doing the work and you want it standardized, you want your work product looking like storm trappers in a row in the main part of the slide -- rather than the guy peeking out in the inset. You want to make sure that things are coming out the same, basically. When you have a lot of people doing the same tasks. At different times.

On the other end of the spectrum, you might not have multiple people doing something, you might just have one person doing something and even worse, just one person who knows how to do something. Yes... I see Susan's comments, we want to be like the Rockettes all kicking in unison. If you have institutional knowledge residing inside just one person's head. That's not good for the long-term if something happens to that one person. To go with images on the slide, I've heard many people talk about, what happens if that one person gets hit by a bus? Which is one way to think about it, but... it's also kind of, a little morbid, so... I prefer to think about it as, what if that person wins the lottery and quits work immediately?

Either spin you want to put on it, it's not best practice to have knowledge of how to do something residing within just somebody's, one person's head.

Another reason that you might want to have documentation and I have a feeling this is something that we are all kind of dealing with now, given the current COVID-19 pandemic is that organizational changes can make it very important to have documentation in place. And this can be something like departments merge allege together, perhaps your eresources department, technical services department used to be separate and now they're under one umbrella and get their work flows syncing up or... you know... a library, itself, merges with another department, perhaps the IT department on a university campus or something like that. You will need to think about, you know... it's good to have documentation in place, so that you can say this is how we are currently doing it. How does it need to change?

And... like I said, this current situation is a big deal. For a lot of you, I'm sure your work location has changed. So... number one... documentation, having, in place, is important because... again... with those multiple people doing things differently, if they're literally in different locations and can't just shout over to the next cubicle or walk down the hall and say "how do we do this?" Then... you, having a documentation that everybody can access is very important. And I'm seeing all the comments about oh my gosh, they're shaking hands -- yes... it was really weird going back on these slides that I started doing before the current situation, saying wow... they're definitely not social distancing. Yeah... I do -- I worked from home, normally, even before this whole thing started, but... I can see how it's a huge change walking to someone's desk to ask a question. The work, itself, may change, similar to how your work may change if you merged apartments or something like that. Having that documentation of how you used to do it is important. So that you can reflect how it's doing now.

So... just to get some interaction going and hear what you all are thinking on this topic, what processes need to be documented in your library? Go ahead and type that into chat. There may be things that are documented. Feel free to include that as well. What types of things do you have documentation for and what types of things do you wish you had documentation for? Cataloguing procedures, wow. A lot. We aren't allowed to say all the things -- yeah... probably, that's really, everybody's answer. Public service points. Processing archival materials. Lots of stuff is coming in. Yes... this is something relevant to all areas of library work, I'd say. E-book packages, updating all out of date documentation.

If you paid attention to a subtitle of this presentation, it was lessons we can learn from technical writers. This is kind of the standpoint I've been taking as I've been developing presentations and training about documentation, recently. I'm just starting the process of getting certified as a technical communicator. I think it's helpful for things like this, so... to make sure we're all on the same page about that, what is a technical writer?

This is a definition I got from a book I'll be referencing several times throughout this presentation. The technical writing process and... I admit -- this definition doesn't do -- it's a writer who develops technical documents.

So... what is a technical document? It's a document of a technical nature, again... using the term to define the term, not great. It assists someone to carry out a process or procedure or use a product. Things like user guides, procedures, manuals and quick reference guides and... imagine, properly, procedures and manuals are probably going to be the things we're most-thinking about here. But... you know, some of the other ones, quick reference guides for patrons, things like that, may come into play in libraries as well.

So... how can technical writing help? What does technical writing bring to this process? And help us navigate writing documentation?

So... from the Technical Writing Process Book, it helps because it's a definable, predictable, repeatable process. Once you get in the mindset of writing documentation from this technical writing standpoint, you can plan and schedule and make sure things actually get executed, rather than saying, we should probably write that down some day.

So... if you'd like to try it out a little bit, I'm sure, as you see, you have plenty of things in mind that you need to document in your libraries, but... to kind of simplify it, for this presentation... if you would like to try out a really quick process and we'll have opportunities to share in chat, ideas about documenting it, there is a Google document I have with a -- document explaining the activity. I'll type that URL in the chat as well.

That is awfully long, linked from my blog post on the EXCHANGE blog. That might be quicker to get to. There's a link in there that says instructions.

But... what you'll see when you go to that link -- if you don't want to do it now -- you can do it after the fact and talk about it on the discussion boards. There's a scenario where you need to write documentation for the process of generating a report of items that have never circulated at your library. And so... I have a mock back into the catalog, using tiny cats software. And you can sign in with the following information.

That's amigos_training and exchange 2020 is the username and password. I'll type those in the chat as well.

When you get there... the task is to figure out how to generate a report of items that have never circulated and write a document, detailing how to create this report.

It's fairly simple. When you get to the back end, it looks like this. You click on the report button... you click on the items not leant link and there was a bonus activity, click the filter by date checkbox and put in the start and end dates you want. That's a fairly simplified process here. We'll refer back to that throughout the presentation for some brainstorming. What I mainly want to share today comes from the Technical Writing Process Book. Kieran Morgan bases the plan on five steps. Plan, structure, write, review and publish. I'll go through each of those steps and what is involved in those steps.

For planning, the first activity, you should think about is... defining the scope and the process and the stakeholders for whatever it is that you're documenting. The scope is, the work to be done in the documentation project. What process is it that you want to document? This goes hand-in-hand with defining the process. Where does this particular process begin and end? What exactly are you focusing on? Otherwise -- you can have scope creep where you start throwing in lots of other things that need to be documented in your libraries. I recommend focusing on one discrete process to start with.

And then you also want to think about the stakeholders. Which I know is kind of a very, you know... corporate buzz wordy type word, but... in this case, I want you to think about both the audience, who is going to use this documentation? Is it your circulation staff, reference librarians or tech services folks? Who does this process matter to? Who is going to be inconvenienced if this process is not done the right way every time? Does it matter to your library administrators? Does it matter to your patrons? Things like that.

I threw three things at you in that last step, scope, process, and stakeholders. We'll talk about stakeholders right now. Think of a process in your library. Type in the chat, who are the stakeholders for that process. Tell us what the process is and who is one stakeholder you can think of? You can think about our mock catalog activity, trying to pull up items that never circulated? Who would be a stakeholder for that? Somebody who participated in the process or somebody for whom that activity would matter.

People saying library staff and patrons are probably stakeholders for pretty much everything we do. Consortia partners, that's another one to think about. Temporary fillin or new employee, yes... they are people who would use your documentation. Students, faculty, staff, community. Those will come after, absolutely. A lot of the reason to do it is to prevent that hit by a bus or win the lottery situation. Other library units, exactly. Donors, that's another one to think about.

For items never circulated, the library director, collection development librarian, absolutely. Acquisitions, you may need to make decisions about what to read or what not to buy, similar-types of items -- absolutely. Things you want to think about, kind of go with the journalism Ws and age question -- who is the audience? Why do they need the documentation? When will they use it? Where and how will they use it and what's important to them? What do they need to know? Keep those in mind as you go through your process.

The next step in planning is to select the techniques and tools. I'm going to go through it really quickly. The slides will be there for reference on the EXCHANGE website, later, to come back and refer to these. You might use fairly standard office software, word processing software, image editing software, desktop publishing. I won't spend a lot of time on those. The last three are what I'll talk about in more detail.

Depending on what it is you're documenting, you might want to consider special help authoring tools, these are made for writing help documentation for, like... technical products. When it comes to these, their ability, beyond traditional word processing software, they have the ability to solve problems of scale, they're great when a team of authors are working on a project. It allows for things like document control and version control and reusing components of content. If you have chunks of processes that are involved in several different processes, you can repurpose content and not have to write it all from scratch, every time.

And so... those examples I put on the slide, HelpNDoc is free, the other two are subscription tools. Content management systems are also things that, they're things that will be referred to constantly, you might want to put it, not just on a paper document or Word document somewhere, but something like WordPress or internet like SharePoint. That's something you might also use for that.

Yeah... that's true, we'll talk more about that, Travis, your comment in chat. Sometimes e-mailing multiple copies of documents around is a really bad way to make sure we're all on the same page.

And you also might use flow chart or process mapping software. Instead of a text-based documentation, you more have a chart of how to do things. I like LucidChart for that, to track where things are coming from and where we need to go to get them in our digital asset management system. If you're a type of person who operates more visually, than text-based, a flow chart or process mapping software might be the way to go. I haven't seen the LucidChart ads, thanks, Jennifer, I'll look that up.

Another step in planning is to schedule the project. And by this, I mean, schedule -- not when you'll do the process, but when the documentation should be done. It's really easy to put this on the back burner and wait, but... you can do this, even just a high-level timeline, where you say this'll be done by

July... or you can actually schedule each step, saying we will have the basic structure done by this, we'll have you know... the final product done by this. You can have a very detailed schedule, if you want.

Another thing to consider when planning is to check for templates or style guides. If there's some way to kind of standardize the appearance and the headings of your documents, use them and... if they're -- you don't have them, maybe consider creating them to get your ducks in a row, so to speak. When making -- you know... it's easier to navigate documentation when you know what to look for, you know... where is the table of contents going to be when all your processes look the same, it makes people -- it makes it easier for people to follow them.

And another step in planning is to gather information, this can be existing documentation in your library, if it's something that has been documented before, it might need to be updated. You can start with existing documentation. Or... you can look at other library's documentation for similar processes, if they have something available on the web, where there's a website called library work flow exchange. That's really useful as well. For people posting how they do different things.

And... lastly, if there is no existing documentation or even if there; you should talk to people who do the process, if that's not yourself.

And even if it is, if there are multiple people who do the process, talk to them and kind of see what are the unifying factors between how they all do the process.

The next step in the technical writing process is structure. Creating a structure. And sort of an outline of what the documentation is going to cover. In the technical writing process books, the author refers to it as a table of contents. It doesn't have to literally be a table of contents, but... you kind of interchange that with structure.

There are several different types of structures, I'm not going to spend a lot of time on narrative, because... that's pretty much what it sounds like. Lots of text and I don't think most of our documentation is that. And... the last one is system-based, which is like... technical specifications for products, something that you know... someone who is selling a product, users manual, might generate. I think we're not going to really have that very much in libraries either.

So... the, I'll go back for a second. Process-base, where you literally lay out the steps in doing a process and library-base, which I know is confusing for those of us in libraries, but... think of that as more like a Wiki or a blog where you don't necessarily need to follow things step-by-step. You can go and look at one article on a particular topic when you need that information.

So... what kind of structure usually applies to your library's documentation? Library, process-based, narrative, I'm guessing most of them are probably process-based, but you never know. While you're typing those in -- I like that comment, Lauren. Does this make sense to someone who doesn't live in my head? Absolutely, that's what we're after. I have narrative and process-based coming through. Process-based structure is based on a sequence of activities, usually involves a verb/noun format, download report, something like that. A very simple -- yeah... I'd say, Ellen -- I see your question. Process-based is like work flow. Exactly.

So... to create a process-based one, use any existing information you gathered about the process and then you'll create what's called a process model.

And one way to do this is start at the very top level. Describe the process in ideally, less than six terms, that capture the entire process from start to finish and... it may seem kind of incomplete, but we're going to add more details later.

So... for our mock activity, perhaps, and again, I'm extrapolating a little bit to tie that into what you might do with the information afterwards -- your top level might be download the report from librarycat.org, add report to spreadsheet, collate monthly reports for the annual report.

The next step is to create a sublevel for each step. So... the first step, download report for librarycat.org might have three steps underneath it. And I'm mindful of time here, so... if you'd like to -- you can go ahead and brainstorm some second-level steps for the mock catalog process. For download report, some of the steps that would be involved in that.

But... I'm going to keep going with content so that we don't run out of time here and so we have time for questions.

And then you can either map this model to a table of contents or... you're doing it in the more LucidChart flow chart type of thing, you can organize it in a flow chart.

Library structure, on the other hand, is more like a blog or internet, where people can, there are a set of individual units that can stand on their own. And some things to keep in mind, when you're doing a library structure is, you know... name things in a consistent way, use tagging, like... assign subjects so that people can find everything on tech services or everything on circulation when they want you and use a system that has breadcrumbs so people can navigate back to where they want.

And... again, I think we can probably all agree, it'd be a process-based structure for the mock activity. And so... once you've -- the last step in your structure part of the process is to review the structure with the subject matter experts and kind of get their go-ahead. So you're not just going off on a wild goose chase and have to be reeled back in later.

The next part of the process is to write and writing the first draft is kind of a way to just get going. I like this quote. It's always possible to edit a bad page, but not a blank page. Just get something written. That's important to do. And go back to the stakeholders and review the draft. You may need to complete this a few times to incorporate changes.

One thing I found interesting when reading about this process is that you want to be aware of what's called unconscious competence. People who are really good at doing something, but... they're really bad at articulating how they do it. Which isn't to say don't use them, necessarily, but... also get perspectives from other people.

And I've been the unconscious competence at times in the past. In high school, I tried to tutor languages, I was just learning Spanish, for example, just came really easily to me. It was really hard for me to explain how to learn it. So... just because somebody thinks it's easy, doesn't mean they're the best person to explain it. Getting multiple viewpoints is important.

And then, I've got this circle of arrows on here, because... you just repeat this. Review and revise the draft as much as you can.

When you've got it, kind of, at a final draft stage -- not the final published project, format and lay it out the way you want. Make sure the headings look the way you want. This will depend on what you want to do, which type of, if you're doing a flow chart or... a library-based or... you know... more process-based, things like that. It'll depend on how you're editing. When you've got it to what you call your final draft... then you start the review phase. This is one last time to look at it.

And... you should define a review team. Some places are in smaller institutions where the review team might just be the two librarians who work there. That's okay. If you're at a larger institution, define who you want to look it over. And... one thing to think about is... to consider creating a review matrix so everybody's assigned to a particular thing to look at. So... not everybody's bogged down looking at language, spelling and grammar. You assign that to one particular person. So... it probably, perhaps someone who maybe, doesn't have as much content knowledge on it. They can look for the grammar stuff and... somebody else can look for adherence to the template or style guide. Someone else can actually check the process for... for accuracy.

And so... once you've got your review team in place, also ask your stakeholders to review it. Collate the feedback, good, bad, everything and revise the draft if necessary.

Again... here's another type of document you might find useful. Having a review of the log where you actually collate all the feedback you got, who it came from, and then mark it closed when you've actually taken care of that issue.

Officially obtain approval to finish, from whoever -- if it's your director, whoever can say "yes, this is good to go." Document that in e-mail or whatever to make sure this is officially official. Get your seal of approval, so to speak.

Let's see... I'm going to go back. A question to go back to the other one for the review matrix. In this particular example -- they can be, you know... different, depending on your project. I had someone assigned to a style guide. Someone assigned to little things like language, spelling and grammar. And someone who actually checks the process for accuracy.

And so... the final thing, moving from the review to the publish phase is to finalize the document. No major changes should be made at this point, just minor clean-ups. Check formatting and layout, are styles and fonts correctly applied? Do pages break when they're supposed to? Things like that. Establish document control. What I mean, there's two aspects that go into it, a revision history association... noting, you know... can be as simple as adding something to the front page or the bottom of the webpage that says revised May 2020 or something like that. Just so people have an idea on... when this was last updated and then, something that notes approval, you know... did the library director approve this documentation and... you know... just -- a note that, you know... yes... this has been approved as the official way to do this.

And so... then you publish the final draft and... I say publish, that can take many forms. Not necessarily sending it to a printer, but putting something on a website, SharePoint, sending an e-mail with the final version of the document, something like that.

And then communicate with your stakeholders. If you have published something, by a method other than e-mailing the document... or if there are stakeholders who didn't receive a copy of the document, but need to know what's going on with it... sending out an e-mail message to the stakeholders would be good.

So... I know that probably, people have been wondering how do we fit any? Although... I have seen people who said that you know... they have a lot more time to do documentation now that we have our kind of, removed from our libraries in a lot of ways.

And I'd say -- I say yes, that is an important question, but... why do we fit this in is something to think about. I'd like to make the point that doing the heavy-lifting once can make it easier later on. Writing this documentation now can seem like a pain, but it'll make doing the process and editing the documentation later easier, so... it's worth it.

It also, you know... going through this and identifying the stakeholders and everything has a way of creating consensus. People feel like they're all on board for how this is done.

But... there is still an issue of how do we fit this in? And I'd want you to keep in mind, this process can be flexible. You don't have to have a super detailed schedule when you're in the plan phase. You can just create a high level timeline. Your review process might be much less structured than what I laid out here. You can tweak it to fit your situation.

They give a number of examples of people's technical writing outlines that are really -- varied, from a really big corporation where they have to really, meticulously schedule everything from a much more go with the flow type of plan. There are ways to customize this.

That is one resource I highly recommend. I recommend Technical Communication Today, another book I've been reading and getting a lot of good information from. So... does anyone have any questions? That is -- I've seen a lot of things coming in through chat and that's great that everybody is... conversing. I'm looking back to see if I have missed any questions. I've seen recommendations of write the docs --

>> Michael: I have a question for you. An important question, I think I've run into this quite a bit. How do you suggest getting buy-in from staff who, maybe, resisted to putting in the effort to create documentation? That experience?

>> Emily: That is a good question. I've seen some discussion to that effect in the chat as well. I think... hopefully making points I made in the presentation, this will streamline things later -- it will allow for consistency of process. Maybe highlighting some of the ways in which a patron confronting the results of inconsistent processes might experience frustration if not everything is cataloged exactly the same way. They may be missing out on your collection.

I also think, just this process, in general... of... identifying stakeholders and... bringing people into the process of writing documentation can make them feel less like "you need to document this because the higher ups said so." Rather than... we're all working together to make our processes go smoothly. That's be my suggestion for that.

Seeing a comment come in the chat that perhaps you should ask why they're resistant. That's an excellent thing to keep in mind. You may see them as somebody who is not willing to change, but they might have a good reason they're resistant about it, maybe you can work with them to get over that resistance -- get over the hump a little bit. And yes... documentation by word of mouth is not the most-efficient thing at all. I saw someone in chat say, if someone's on vacation and another person fills in and they see the results when they come back, absolutely. As many as learning things the hard way is the way to get people on board, for sure.

I think we have about five minutes left or so, Michael correct me if I'm wrong.

>> This is a great presentation, getting some great pointers, taking some notes. It was really good.

>> Emily: Thank you. I see people talking about their favorite tools in chat. SharePoint and... when it comes to tools -- it's just trial and error -- finding things that work for you in your organization, specifically.

I see Shannon wrote she has staff who are shy writers. They're not good at spelling or grammar, and writing is hard for them. Trying to create a supportive, nonjudgmental environment is important. That's true. Perhaps that's some of the reason to explore flow chart type of things. Find the format that works, not just for people to use, but for people to create as well. Which ones are things that people really... gravitate to, perhaps. Keeping an eye on the chat here. You could bring a consultant to help people with this and yes... this presentation with, mentioning all these tools and stuff, will be available on the EXCHANGE website.

>> Do you recommend one tool over another?

>> Emily: I think I touched on it, but... it really depends on the person using it and the institution, you know... if you are a place that really likes just have, like I said, when I was at my corporate job in digital asset management, they really liked flow chart. Things you could look at at a glance, things that flow from one department to another. Others had more text-based documentation. They'd keep Word documents or put them up on the Wiki. Find what works for you. How do you handle documenting a process that changes with monthly updates?

Holy cow, yeah... that's a good question. That's true -- I don't know that I necessarily have a guidance on that, other than... maybe have an easily-editable document that, as somebody knows in the system updates and assign somebody to be in charge of making it, making the documentation update. Just have somebody who is the -- okay... our catalog -- all of our... whatever, if they updated their documentation, you need to update ours once a month -- something like that

People talking about -- people talking about using conflicting tools or everybody using something different. I've worked at organizations like that too. One month we're all trying [indiscernible] and another month we're all trying Trillo [phonetic] and everybody wants to jump on whatever the hottest new product management tool is or whatever. That can be frustrating too. It's important to use what works best for your organization and not just change for the sake of changing.

I see people that say the process changes sounds like ALMA. Others saying can you refer to the current system guide? I'd say so. I haven't used ALMA. If that's what this is in reference to, I don't know how widespread the monthly changes are, but... hopefully you can just change minor parts of your documentation. To kind of create the culture of, if you notice a change, either make the change in our documentation or talk to the person who is officially in charge of it.

And... yeah, I guess that's something I didn't mention talking about organizational changes, changing your software or your ILS or eresources platform -- that can be a reason for documentation changes as well.

It looks like we're down to less than a minute. Does anybody have any burning questions to throw out there in the last minute? I'm seeing Abigail said we have documentation in a couple locations, Dropbox, Google Drive, yes... staff often forget where to find the correct files. I'd say that you pick one place and perhaps -- just a couple -- [laughter] -- yeah... if you can, pick one place to consolidate and put that into the gathering information step of your documentation. Treat it like old documentation. Even if you don't need to change it, change the place where it's located and bring them all together.

>> On that note: Thank you, Emily, again. That was a great presentation, very informative, very useful. If you want

to continue the discussion with Emily, go to the discussion rooms or reach out to Emily directly. And... I think we will now enter our ten-minute break and we'll convene at five past the hour. Thank you, again, Emily.

>> Emily: Thanks, everybody.

>> Hello, and welcome back to our final segment of day two. The lightning rounds. So... the -- what we're going to be doing going forward is we will be playing the prerecorded presentations and you'll get the opportunity to interact with the presenters in the discussion forums.

As a technical side note -- if you have any trouble viewing the lightning rounds in the Zoom webinar, which we don't see any issues with this year, they'll be available to watch from their individual pages on the EXCHANGE website. Go to program and lightning rounds and click the link for the presentation. This'll be the best way to access the individual discussion forums for each lightning round. Since you're not here to listen to me, on to our presentations.

>> Hello, everyone, my name is Joyce Garczynski. Welcome to my lightning talk. Changing your library's caustic culture with kindness and coffee. Towson University is a public comprehensive university in Maryland. We are the largest university in the Baltimore region, with about 23,000 students. We have a single library, Albert S. Cook with close to 50 employees. Our staff is about half librarians and half paraprofessionals. We have a relatively flat organization with six departments, access services, advancement and assessment, content management, IT, research and instruction, as well as special collections and university archives.

With this flat organization comes some challenges. First... we can only get together as a whole staff about once a month because of our size. And two, our work can be very siloed. It was not uncommon to feel like you didn't know what was happening outside of your department.

I often found myself and my coworkers saying "I wish I would have known about that project that someone else was working on."

In order to encourage library employees to break out of their silos and pay attention to the good work that their coworkers are doing, I created the Shining Star Program. How it works, is that when one staff member notices a coworker doing something outstanding in their work, maybe it's completing a big project, or providing outstanding customer service, that person can nominate their coworker.

The nomination is simply a web form that asks who the nominator is, who the nominee is, and what the nominee did.

Every month, a few days before the staff meeting, I send an e-mail reminder to the staff to submit their nominations.

Then, just hours before the staff meeting, all the nominations from the last month are pulled from the online form. They are read aloud at the end of the meeting so everyone can hear the great work that has happened.

And as a reward, both the nominee and the nominator are entered into a drawing for a much-desired $10 Starbucks giftcard. We have a Starbucks in our building.

In total, this program costs $120 per year.

Then, after the staff meeting, we send all the nominations out to the whole library via e-mail, in case someone couldn't be at the staff meeting.

As demonstrated by these quotes, the Shining Star Program has had a positive impact on the morale and communication of our employees. It encourages employees to collaborate, to notice the good work that others do. It enhances communication across the library. And it makes all staff feel more positively about their work environment.

I believe one of the keys to this program being so successful is that both the nominee and the nominator are entered into the drawing.

This encourages all staff to share what they're working on with one another. And to pay attention to the good work that others are doing.

In fact, this program is so valuable that we've continued it, even though we are now working remotely due to COVID-19.

We are still having monthly staff meetings, they are just held via Webex instead of in person. The only change, really, that I use, that I now use Excel to randomly select giftcard winners, instead of pulling the names out of a basket.

For my library, the Shining Star has proven to be an easy and inexpensive way to improve staff morale and communication.

>> Hello everyone, my name is Jesse Lambertson. My presentation is on metadata futures, UI/UX and discovery creativity and I really want to focus on this idea of metadata features as a collaborative, sort of iteration, concept. I think there's a lot of use in there. My inspiration comes from, mostly the work of Jorge Luis Borges. I want to use this metadata and/or the garden of forking cliffs on the internet to frame our conversation today.

Because... I think it's a good place to start, we're talking about collaborations, aesthetics. All this metadata has aesthetic and we choose what it looks like, based on the context. I want this to be clear, when we're choosing discovery, resources with search results, the aesthetic of those results is part of that discovery aggregation. That's my frame of mind I want us to have as we're moving. Truth is, aesthetics, you know... sort of takes a role in metadata all over the place. For instance... here, a double and quarter view of a map produced in Russia, produced by this company and you can see there's an associated metadata associated with it. On the left is the same map from the Luna, which includes the digitized object but at the same time, includes metadata associated with it. As you can see, they don't like the same at all.

On the left here, is the same map from the catalog and you can see the MARC tags, the subfield and various pieces that enable results to come back to the user as they do.

On the right is the aesthetic, sort of version of that same metadata and you can see those elements that are designed for the user. There's the blue, clickable link, sort of set, the series and subjects, these can click through all those. On the top is the title, this has been brought to the surface aesthetically, not just topographically to the top, but aesthetically to the top by using a larger font and bolding of sorts.

You know, the truth is, like all of these digital objects and web views we see when we're looking at our resources, they all have tweaked and functional structuring elements that happen behind the scenes. That's what I wanted to do here, look at the level at which the metadata is being operated on and what's happening behind the scenes, and here's the same map from the HTML side, which you don't see unless you're looking at the source code. The point is, it's all there. Here's the same view from OCLC side, which covers some of the same ideas. Bold user-enabled font for picking the right resource. Clickable, blue links. The discovery side has University of Chicago holdings on this map. I wanted to have a place where the clicking stops, for a brief time, because... here... when you click through, you know... looking for the resource and Library of Congress catalog, we see there are no results because... Library of Congress doesn't have this map. So... I just think it's funny for some reason. Anyway... thank you so much for that.

The truth is that MARC is dead. Maybe that's not true -- but the truth is, it's something we have to be aware of. MARC is changing a lot. Right now... it's being changed for link data, it's being set up to interface with new systems and we're also preparing its conversion to new metadata schema which are on their way. Let's keep that on our minds as we move forward. Truth is... the link data or the aesthetics of metadata in the link data environment has been fully enabled by the national Swedish catalog at their library, their entire catalog has pushed link data. An internet search will return it. Library of Congress doesn't have that functionality. Only the link data services available on the internet. Resources and sales aren't exposed to the internet yet, that's a thing. You can see this completely different look to it. All these interfaces on the internet are computer to computer, networks, switches, routing operations of all sorts. It happens at scale where it seems mystic. I want to scale that back and say "it is mystic, but it's really not." For instance, if I go to the Google search interface and tag in Jorge Luis at lib Chicago.edu, I get no results, other than the name of their work which is exposed on the internet, but the actual resources are not. If I do that same exact search on Libris's catalog, I get all these resources and we can see here, that all of those resources, when you click through the Google search to their catalog, look completely different. I want to point out the range of objects we have when we're choosing what metadata looks like. What is the work? The work is people, it's computers and okay... not cyborgs, but lots of iterations in time. I want to keep this in mind as we're thinking. The truth is, I think I say that a lot, but... that's okay. Metadata enables access, that's old hat, but access requires description. They can't have access without metadata of a rigorous and robust type behind the scenes. This means that public services teams, please don't be afraid to talk about metadata to the people you serve. Don't be afraid to talk about it with metadata people. These are the features.

With that in mind, I want to say, thank you so much, everybody and I look forward to a fabulous Q&A time when we get there.

>> Hi, everyone, I'm Sheila Rabun, the ORCID U.S. community specialist from Eugene, Oregon. I provide dedicated support for the organizationality members of the ORCID U.S. Community Consortium, administered by Lyrasis in partnership with the big 10 academic alliance, the northeast research libraries. We're partnering with a group of non-profit health research funders.

Currently, we have 133-member organizations, most of which are universities led by university libraries. As you might already know, ORCID is a not-for-profit organization that provides a free unique persistent identifier for individuals called an ORCID ID, which links to an ORCID record, where individuals can keep a record of their affiliations, activities and contributions over time, similar to what you'd see on a CV. Instead of a static Word doc dock, ORCID is interoperable and provides a trusted central hub for storing this data. Currently there, are over 8 million ORCID records stored in the ORCID registry from researchers around the globe. And data within ORCID records can be transferred between the ORCID registry and institutional systems that have been enabled to work with the ORCID API. Or Application Programming Interface.

So... in addition to the ORCID ID and ORCID record, ORCID provides a technical infrastructure that allows for person-based data between systems, allowing for institutions to connect directly with researcher's authenticated IDs and pull data into local systems from ORCID records, as well as write data to ORCID records and get automatically updated when changes are made within ORCID records.

This graphic illustrates the flow of data in the ORCID ecosystem with a researcher at the center, with their ORCID ID and then organizations like publishers, funders and research institutions connecting to the researcher's ORCID ID and transferring data across the ecosystem. The more individuals and organizations participating in ORCID, the more everyone can benefit.

While ORCID IDs are free for researchers, organizations can become ORCID members to take advantage of this functionality in order to mitigate confusion, caused by name ambiguity, so... if somebody has used different names over the course of their career or if multiple researchers have the same name or same initials, the ORCID ID can help to distinguish different people from each other.

ORCID and the ORCID API can also be used to streamline data collection for things like reporting and assessment internally, looking at both individual contributions and also, aggregate contributions and activities of groups, departments, or at the institutional level.

Organizations can also assert trustworthy and accurate affiliations onto their researcher's ORCID records. That data can be read by other stakeholders in the ORCID ecosystem. Ultimately, all of this is designed to save time and reduce administrative burden, both for researchers and organization staff.

In the ORCID U.S. community we have several institutions building ORCID into their systems and work flows and making sure their researchers know about ORCID and get their ORCID IDs. This list is just an alphabetical list of only a few of the mini libraries doing a stellar job of leading ORCID adoption efforts, leading the way for ORCID operability across the research and scholarly communication landscape. We have so many institutions participating, they really couldn't fit on one slide. Examples and case studies from those institutions you see here can be found online on ORCID U.S. community webpages and community resources and exemplars. There are a few specific institutions that I really want to highlight and share with you what they are doing, specifically with ORCID and the library taking leadership.

The first is University of Virginia. The University of Virginia libraries have created an ORCID microservice application that connects to their Samvera institutional repositories for electronic theses and dissertations. This allows researchers to connect their authenticated ORCID ID with their profile in the IR to ensure that authors are uniquely identified and linked to their contributions.

Once an author has authorized the connection between the University of Virginia and their ORCID record... authenticated ORCID IDs are displayed in the IR along with author names. Both in the author's profile as you see here, as well as on any publications by that author within the IR and... the application is set up to also write work citations to the author's ORCID records. The source of the data appears as university of West Virginia contributing to an accurate record of researcher's work and contributions.

Next, I'll talk about North Carolina state university and how their libraries are also leading ORCID efforts.

NC State university libraries have integrated the ORCID API with their homegrown citation index organization. Where their ORCID ID is displayed on the profile and... any works that might not yet be listed in the citation index can be pulled in from ORCID. So... here you're seeing works. Where the source is ORCID and then... works from the citation index can be written to the ORCID record where, again... you're seeing the source of this data as NC State University Libraries which contributes to the accuracy and integrity of the metadata that's, then, going back out into the ORCID ecosystem.

Library staff have also done a significant amount of outreach to get faculty signed up and connected with their ORCID ID. And... staff in the libraries are also helping researchers use ORCID to populate data in a platform called Science CV, which is a bio sketch tool used by NIH and NSF in their grant proposal submission work flows.

And... finally, I want to share with you, a case study from the University of Texas Southwestern Medical Center. They've integrated ORCID into their data warehouse infrastructure. The purple box is the Enterprise Data Warehouse. This integration is allowing researchers to connect their ORCID ID with their institutional account information. UT Southwestern has mandated that all learners get an ORCID ID and connect it with the institution. With the goal of being able to read data from ORCID to help with grant reporting, often years into the future after students may have already left the organization.

UT Southwestern has implemented several methods to encourage researchers to use ORCID. As well as sending messaging about ORCID from deans and upper level administrators to encourage adoption. Within two months of launching their

ORCID integration, UT southwestern has had over 2,000 researchers connect their ORCID ID with the institution. And that is just a brief overview and summary of what all of these institutions are doing with ORCID. They're also participating in creating a community of practice around ORCID in the U.S., which then feeds into the wider ORCID community at the global level. We have colleagues and countries around the world working with ORCID. In the ORCID U.S. community, we are building the future together. The image you're seeing here is a screen shot from our ORCID discussion form. Check out the many resources we have available. Feel free to send me an e-mail with any questions or if you want to talk more in depth about how you might approach ORCID adoption at your own institution, I'm happy to help. I look forward to your questions. Thank you.

>> Hello, I'm Rhonda Marker and would like to welcome you to my presentation on sustaining virtual members in professional associations. I was asked to attend several communities, the one thing they had in common was that all of them had stopped meeting at ALA annual conferences and mid-winter meetings. They were trying to meet virtually, but... were not able to attract new members and new leadership to their committees. Imagine you attending an ALA annual conference, perhaps like last year's conference in Washington, D.C. You have a list of potential committees that interest you. You might want to become active in one of them. Logistics could narrow your choices. If you have an obligation to attend a session in one venue, you will likely choose your next session based on its proximity to the earlier meeting.

Finally... you sit in one of the committees and soon decide that this is your group. You'd like to get more involved. At one point, the Committee Chair says something like... is there anyone who would like to work on this? You don't have to be a formal member of the committee. And you raise your hand. Two other people have also raised their hands. The Committee Chair asks you for your name. After the meeting, you chat with one of the other people who are working on the project with you as you exit the meeting room together. Is it possible to translate that experience into a virtual meeting scenario? Let's step back and look at how organizations recruit, onboard, engage and communicate with their members.

The first step is membership recruitment. We find our members in public, academic, school and organization libraries. We find early career librarians in i-schools and graduate library schools. Where are other potential members? Once we've located members, we want to establish contact with them. Conference programs and meetings are great ways to bring people together. Websites, e-mail messages and e-mail lists and interactions with colleagues and coworkers also help to solidify contact with potential members.

We usually send a welcome letter or e-mail to new members. New member events at conferences are popular, especially the 101 events that many divisions hold at which new members learn how they can get involved. Text-based communications such as e-mail, newsletters and websites also let members know about the organization. Every organization wants to engage its members. There are calls to volunteer, there is value in attending a conference. We always want to see members move from attend to participate. Increasingly, conferences such as this one are held online. Webinars are a great member benefit too.

When we attend conferences, we engage in informal, but often, personally valuable communication with colleagues. When members participate virtually, it's important that our e-mail systems are easy to use and our websites are up to date. And... easy to navigate. Before this session, I asked you to respond to discussion prompts about how we communicate when there's no in-person meeting and how we increase visibility and how members can discover what they don't know about ALA groups. I have a few suggestions of my own. And we're going to look at those now.

In order to find new members, we need to look beyond our current membership, to look outside our bubble, so to speak.

Affiliated associations, i-schools and graduate programs are a good place to start.

Similarly, we need to communicate outside the inner circle of our current membership. Committees and sections should post notices on division level and ALA-wide sites and lists, instead of expecting members to come to us, we need to reach out to them.

Social media is one way to make it easy to share information. We also can target state and regional affiliates to find and communicate with potential virtual members. Some ALA units are already holding online events for new and potential members. What are some of the ways we can entice people to attend these? The virtual equivalent of refreshments will be served. What are online ice breakers that will help people make personal connections? Is it possible to hold breakout rooms so people can chat with each other in small groups? We want to welcome new members, by name, if possible. We want to let people know about volunteer opportunities. If we want new people to get involved -- we need to make it clear by our language that they are welcome. More of our ALA events will be held online. In our discussion, I'd like to hear your ideas about how we can revitalize virtual membership in our professional organizations.

>> Hello. My name is Brittany Richardson. My lightning talk today is on collaborative web content management strategies. A little background... we typically serve around 11,000 students and the team consists of one web services librarian, that's me and two digital development librarians, I've been in this role for almost two years.

Like most libraries, we have multiple content management systems that our team manages, these are just a few. Our main website is being migrated to Drupal. As the web services librarian, I'm the primary editor for the website.

So... as the steward of our library's website, I'm representing the interest of a lot of different departments within the library. I'd like to give you details on two collaborative methods I've used to gather content and input from groups across the library.

One approach is regularly-scheduled web audits. So... I scheduled these meetings every summer with each library department inviting all faculty and staff within the department. And... ahead of the meeting, I send a document with page hits, links to pages they should review ahead of time, and... notes on any immediate ideas or suggestions that I have. And they can add their ideas to the document ahead of time as well. In that document, I'll also take detailed notes during the meeting, documenting action items and areas for further focus.

So... let's take a look at one of those now. Here's an example of one of the audit documents. It has links to statistics. A link to a spreadsheet. Where all the pages are documented. You can see this go-round, they made some notes here. On copy edits they wanted to see on specific pages. Meeting notes and action items. This is where -- especially when they're bigger than just copy edits. We list things we want to accomplish in the coming year. Who is responsible for accomplishing them?

[Captioner has a hard stop at 3:40 p.m. ET].