Mitigating Risks
One Small Step at a Time
Finding Manageable Ways to Help Cataloging Staff Prepare for the Changes to Come
ILA/NLA/NSLA Joint Conference 2019
Melissa Moll (melissa-moll@uiowa.edu)
The University of Iowa
Thinking about the changes to come...
“Libraries are knowledge organisations and the knowledge of the library’s staff ultimately decides what the library can do and what services it can offer its users… A library needs to keep and uphold the present knowledge, but also to map out the knowledge gap to develop the further growth of knowledge and raise competencies in required areas.”

“Effective, efficient information organization requires a highly trained cataloging and metadata workforce who regularly keeps their knowledge and skills current through continuing professional development in their specific areas…”

AGENDA

Identifying Risks

Training Expectations

Mitigation Strategies

Enabling Communication

Audience Participation
Identifying Risks
Identifying RISKS
Identifying RISKS
RISK mapping

- LOW probability of an accident
- LOW consequences of an accident
- HIGH probability of an accident
- HIGH consequences of an accident
Identifying RISKS

- System migrations
- Keeping up (skills & knowledge)
- More to do + fewer staff hours
- Changing standards & best practices
- Staff changes & retirements
- Budgets
example RISK mapping

LOW probability in the near future

LOW consequences

BIBFRAME
Library management system (LMS) migration

RDA 2020 (original cataloging)
Staff retirements

RDA 2020 (copy cataloging)
Class Web update

LCMPT best practices update

HIGH consequences

HIGH probability in the near future

LOW consequences
What are the risks for your community?

Where would you plot your community’s risks?

LOW consequences

HIGH consequences

LOW probability

HIGH probability
“The progress principle:
Of all the things that can boost emotions, motivation, and perceptions during a workday, the single most important is making progress in meaningful work. And the more frequently people experience that sense of progress, the more likely they are to be creatively productive in the long run.”

Ulm Cathedral
The view from the top
“apparently small acts, which are often ephemeral and hard-to-see, events that are public and private, often unconscious but very effective, which occur wherever people wish to help others to succeed”

Rowe (2008)
Micro-affirmations

“tiny acts of opening doors to opportunity, gestures of inclusion and caring, and graceful acts of listening”

Rowe (2008)
Hypotheses about Micro-affirmations

- Affirm the wellbeing and skills of “affirmers”
- Build trust
- Motivate excellent behavior and performance
- Teach *specific* skills
- Meet the *specific* interests of recipients

Rowe (2017)
tiny acts of opening doors to knowledge which occur wherever we wish to help cataloging staff to succeed
Hypotheses about Micro-training?

- Affirm the wellbeing and skills of our cataloging staff
- Build trust
- Motivate excellent behavior and performance
- Teach *specific* skills
- Meet the *specific* training needs of each staff member
Hypotheses about Micro-training?

- Affirm the wellbeing and skills of our cataloging staff
- Build trust
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“The progress principle: Of all the things that can boost emotions, motivation, and perceptions during a workday, the single most important is making progress in meaningful work.”
## Risk mitigation

<table>
<thead>
<tr>
<th>My community's risks</th>
<th>Probability (near future)</th>
<th>Consequences</th>
<th>Mitigation via Training Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>RDA 2020 (original cataloging)</td>
<td>High</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>RDA 2020 (copy cataloging)</td>
<td>High</td>
<td>Medium</td>
<td></td>
</tr>
<tr>
<td>Staff retirements</td>
<td>Medium</td>
<td>Medium</td>
<td></td>
</tr>
<tr>
<td>LMS migration</td>
<td>Low</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>BIBFRAME</td>
<td>Low</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>LCMPT BP update</td>
<td>High</td>
<td>Low</td>
<td></td>
</tr>
<tr>
<td>Class Web update</td>
<td>High</td>
<td>Medium</td>
<td></td>
</tr>
</tbody>
</table>
## Risk Mitigation

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<th>My community’s risks</th>
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</thead>
</table>
| RDA 2020 (original cataloging) | High | High | Watch RDA Toolkit YouTube videos  
Monitor RDA-L  
Read one RDA Beta Guidance page weekly |
| RDA 2020 (copy cataloging) | High | Medium | Brief overview of one RDA 2020 concept at each monthly department meeting  
Revise copy cat instructions where needed |
| Staff retirements | Medium | Medium | Training partner / Job shadow |
| LMS migration | Low | High | Monthly update summary via email |
| BIBFRAME | Low | High | BF Update Forums at ALA Annual/Midwinter |
| LCMPT BP update | High | Low | Small group discussion (affected staff only) |
| Class Web update | High | Medium | Small group training (everyone who assigns class numbers or subject headings) |
Incorporating Training Steps as an Expectation

“...the knowledge of the library’s staff ultimately decides what the library can do...”
Incorporating Training Steps as a Professional Expectation

“The quality and effectiveness of library and information services depend on the expertise of staff. Constant flux in the needs of societies, changing technologies and growth in professional knowledge demand that librarians and other information professionals expand their knowledge and update their skills on an ongoing basis.”
Incorporating Training Steps as a Professional Expectation
Incorporating Training Steps as a Competency Expectation

“Correlates training needs with identified internal and external changes that impact the library” – Page 34
Incorporating Training Steps as a Departmental Expectation

Departmental Plan
FY2020

Training focus:
- RDA 2020
- Diversity, equity, and inclusion
- Classification Web (new user interface)
- Skype (text, phone)
Incorporating Training Steps as a Job Expectation

2019 Work Plan

Action Plan:
- Watch webinars offered by the RDA Steering Committee
- Complete RDA Toolkit workshop series Summer 2019
- Every month, spend 1 hour exploring the RDA Toolkit
- Watch RDA Toolkit videos
- Complete RDA Toolkit Beta Site and watch 2 videos on the RDA Toolkit

Goal 1: Focus this year’s training efforts on the RDA Toolkit

Restructure and Redesign Project (RR Project)

Meeting:
- Attended training meeting held in the office
- Attended training meeting held in the office

Cataloging:
- Focused on the frontlog this month

Monthly Activity Report

- Watched 2 RDA Toolkit videos
- Read an article on BIBFRAME
- Held a meeting on fixed fields in holdings records
Incorporating Training Steps as a Job Expectation at the point of hire

Q: Tell me about a time you learned to do something you’d never done before...
Incorporating Training Steps as a Supervisor Expectation

How was your week? Did looking at the best practices document help?

Meanwhile, at their weekly check-in...

Yes, thanks for suggesting that. This week I want to find more examples.
Incorporating Training Steps as a Migration Expectation

Migration Plan

- Map out timeline
- Identify training needs
- Install tech infrastructure
- Draft how-to instructions
- Hold small group training
“You need to figure out what you want your leadership team to be intentional about—because if they aren’t intentional about it, it won’t happen. There’s hundreds of things that will naturally happen. And then there are the things that won’t.”

5 tricks to keep working out / training (no matter how busy you are):

1. Schedule it
2. Start small
3. Do shorter workouts
4. Commit for just 30 days
5. Make it a ritual

Stryker, Krista. "5 Tricks to Keep Working Out (No Matter How Busy You Are)." Accessed August 19, 2019
https://www.mindbodygreen.com/0-10741/5-tricks-to-keep-working-out-no-matter-how-busy-you-are.html
SCHEDULE IT (for yourself)
SCHEDULE IT (for everyone)

At some point during your workday on Wednesday, October 9, watch this 25-minute video on Appellation Elements in the new RDA Toolkit.
SCHEDULE IT (for everyone)

TRAINING UNMEETING (POP-UP VERSION)

Announcing...

Alma Day!

Today, Wednesday, May 18 is C-M’s first official Alma Day between now and migration.

What, you ask, is an Alma Day?
It’s a day when everyone in C-M tries out their workflows in Alma.

If cataloging is a regular part of your activities:
- Find at least 3 physical items currently waiting to be cataloged. (Items that have come to us in 2016.)
- For each item, use an Alma external resources search to locate copy in WorldCat.
Today's meeting agenda

- Project updates
- HR updates
- 10 min. training: Macros
CHOOSE YOUR OWN mini TRAINING ADVENTURE

DO SHORTER WORKOUTS
Phase 3 C-M Alma Training: “Choose Your Own Adventure”
May-June 2016

C-M Alma training during May and June will focus on:

- Self-guided exploration in Alma (“Choose your own adventure”)
  - Aim for at least 30 minutes each week.
  - Consult Ex Libris documentation or our local C-M Alma training materials as needed.
  - Include your Phase 3 training activities in your MAR, noting what tasks/workflows you explored.

- Group sessions on specific tasks, workflows, or categories of work will be offered (examples: GovDocs, linking, work orders, itemized sets, etc.)

Possible Alma topics for your self-guided explorations:

- Search strategies, especially using data points for which you have search results: title/author, MMS ID, items in a particular location, number of items in a particular month, etc.
- Search external resources (e.g., WorldCat)
- Search the authority file in the CZ
- Shelf listing (LC class numbers, accession numbers)
- Try out all the Alma macros/shortcuts/hotkeys
- Import, overlay, or merge a bib record
- Edit a bib record (add/delete fields or subfields, open the 002 record to their authority records, etc.)
- Create or edit a holdings record
- Relink a holdings record
- Delete a bib or holdings record (if you have that user role)
- Create, copy, link, or delete an item record
- Update item-level information
- Expand a record from a template
- Create a logical or itemized set
- Initiate a work order (e.g. send an item to binding)
- Copy cataloging end-to-end workflow
- Gift cataloging end-to-end workflow
- Other end-to-end workflows or tasks that you perform

DO SHORTER WORKOUTS

CHOOSE YOUR OWN mini TRAINING ADVENTURE
Self-Guided Training Topics
July – December 2019

LOCAL WORKFLOWS
☐ Read the new barcoding procedures (expected in August)
☐ Locate your three most-used workflow docs on the new SharePoint site

CLASS WEB
☐ Spend 10 minutes navigating through the Class Web components
☐ Explore the three classification browser options of Standard / Enhanced / Hierarchy

RDA TOOLKIT
☐ Watch a video on the RDA Toolkit YouTube channel
☐ Spend 15 minutes navigating the RDA Toolkit Beta site
☐ In the RDA Toolkit Beta site, read “Introduction to RDA” (under the Guidance tab)

TECH
☐ Watch the university training video on Skype

PERSONALIZED TRAINING TOPICS (consult with your supervisor)
☐ ____________________________
☐ ____________________________
☐ ____________________________

DO SHORTER WORKOUTS
CHOOSE YOUR OWN mini TRAINING ADVENTURE
TRAINING THEME OF THE MONTH

COMMIT FOR JUST...
12 months
<table>
<thead>
<tr>
<th>Training topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>385 Audience</td>
</tr>
<tr>
<td>386 Creator</td>
</tr>
<tr>
<td>Relationship designator best practices</td>
</tr>
<tr>
<td>380 Form of work</td>
</tr>
<tr>
<td>655 Art music vs. Chamber music -- current practice?</td>
</tr>
<tr>
<td>When to add 546 for language?</td>
</tr>
<tr>
<td>856 when to add?</td>
</tr>
<tr>
<td>Practice of adding SH generic + specific</td>
</tr>
<tr>
<td>Review adding &quot;extra&quot; description to item record description</td>
</tr>
</tbody>
</table>

Add a to-do

LCMPT | Thu, Jun 6
T4: THIRD THURSDAY TRAINING TEAM

COMMIT FOR JUST...
once a month
Reach the summit of Marc Mountain!

Sessions held daily
6th – 10th

Commit for just…
a few (intense) days

*For sustenance, coffee and muffins provided daily to boot camp mountaineers
COFFEE + CUPCAKE = TIME TO TRAIN!

MAKE IT A RITUAL
NEW RDA TERM OF THE WEEK

Metadata Description Set
One or more metadata statements that describe and relate individual instances of one or more RDA entities.

IN OTHER WORDS:

Metadata statements: Metadata description set:
WE DID IT!
Mitigation Strategies
pt. 2
Leverage the power of a team

**THE PROGRESS PRINCIPLE**

**CATALYSTS**
actions that directly support work, including help from a person or group
Learning Teams

Upcoming Library Events - Teaching Librarians Journal Club

| Description | The Instruction Team is starting up the Teaching Librarians Journal Club again! Our recurring meetings will be on the last Wednesday of each month at 10:30 AM in 2032 LIB. Everyone is welcome to attend.

At our upcoming meeting on Wednesday, July 31st, Tim Arnold will lead the discussion of a working paper from Stanford: "Lateral Reading: Reading Less and Learning More When Evaluating Digital Information." We hope you can join us! Please let me know if you have any questions or if you'd like to volunteer to lead the discussion at a subsequent meeting. |
Training Partners
Identify expertise
Round-robin training
Training fair
Drop-in training

10-11 a.m. today
Drop-in training from Maggie on the new time records

Pet of the week
Cutter the cat who prefers catnip toys in alphabet or number shapes

THE TRAINER IS IN
Celebrate the wins!

THE PROGRESS PRINCIPLE

NOURISHERS

events such as shows of respect and words of encouragement
Celebrate the wins!
Enabling Multi-directional Training Communication
BROADCAST
COMMUNICATE
CONNECT
CORRESPOND
DISSEMINATE
GET ACROSS
IMPART
INFORM
PASS ON
TRANSFER
TRANSMIT
via paper
RDA Recording Methods (4-fold path)

Source: Name, Title, Recording Methods, Transcription, and Facilitation Techniques: Perspectives from the IFLA RDA Platorm Meeting, Nashville, Canada, October 21-23. CC BY 4.0
Relationship designators are always preceded by a comma, unless the heading (access point) ends in an open date.

Example:

**OK:**

700 1 _ $a Doe, John, $d 1900-1999 $e author.

**Not OK:**

700 1 _ $a Doe, John, $d 1900-1999 $e author.

Further details and examples can be found in the PCC Training Manual for Applying Relationship Designators in Bibliographic Records, pages 18-20.

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LCSH free-floating subdivision: $v Biography

This subdivision is used for classes of persons but not for name headings of individual people. The assumption is that if an individual person's name is used as a subject heading, there's biographical content included and the $v Biography is superfluous.

**So this is OK** (class of persons):

650 _0 $a Presidents $z France $v Biography.

**But this isn't** (heading of an individual person):

600 10 $a Macron, Emmanuel, $d 1977- $v Biography.
Use the relationship designator terms found in RDA Appendices I-M ($e honouree)

- Cataloging Tip of the Day by Melissa Moll • 9:23am — Use the relationship designator terms found in RDA Appendices I-M, even when the spelling is British

Expressions in more than one language (preferred titles/uniform titles with more than one language)

- Cataloging Tip of the Day by Melissa Moll • 9:22am — In AACR2, two languages could be named in the same uniform title ($I), with the original language given

Using a relationship designator ($e, or $j for X11 fields) in a name/title heading (i.e., analytical name/title access point)

- Cataloging Tip of the Day by Melissa Moll • 9:22am — Do not use a relationship designator in a name/title access point tagged MARC 700-711 or 800-811, or in a
Name heading with open date + relationship designator ($e)

If the heading (access point) ends in an open date, do not precede the relationship designator ($e) with a comma.

**EXAMPLE:**

OK: 700 1_ $a Doe, John, $d 1900; $e author.
Not OK: 700 1_ $a Doe, John, $d 1900, $e author.

Further details and examples can be found in the PCC Training Manual for Applying Relationship Designators in Bibliographic Records, pages 18-20.

Have an idea for a cataloging tip of the day? [Here’s a link to a form to add your idea.](#)
Have an idea for a Cataloging Tip of the Day?

1. What’s your tip?

Enter your answer

2. Have any examples?

Enter your answer
Build in communication & assessment pathways
Find an easy way for staff to suggest training topics
***
pencil & paper
Find an easy way for staff to suggest training topics

***
online form
Crowdsource the training agenda

What questions do you have about....Classification Web?

We'll build our upcoming Class Web training on the questions you ask here, so ask away!

1. How do I <<fill in the blank>> in Class Web?

   Enter your answer

2. Any tips for using Class Web?

   Enter your answer
Take the collective training pulse

Training Pulse Survey (week of Sept. 9-13)

Please submit your answer by Wednesday noon.

1. Place barcodes for bound monographic print materials (books) on the back of the book, with the spine to the right.
   - True
   - False

2. The new barcode placement for bound monographic print materials (books) applies to both hardcover and paperback.
   - True
   - False

Training Pulse Survey (week of Sept. 2-6)

Please submit your answer by Wednesday noon.

1. How confident are you in using the new Classification Web interface?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Really Confident</th>
<th>Confident</th>
<th>Not Sure</th>
<th>Not Confident</th>
<th>Really Not Confident</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logging into the new Class Web</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Searching for LCC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Searching for an LCGFT term</td>
<td></td>
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</tr>
<tr>
<td>Browsing LCSH</td>
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</tr>
<tr>
<td>Finding a table</td>
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Submit
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<tr>
<td>Risk #1</td>
<td>High</td>
<td>High</td>
<td>don’t panic</td>
</tr>
<tr>
<td>Risk #2</td>
<td>High</td>
<td>Medium</td>
<td>breathe</td>
</tr>
<tr>
<td>Risk #3</td>
<td>Medium</td>
<td>Low</td>
<td>find one small step you can take</td>
</tr>
<tr>
<td>Risk #4</td>
<td>Low</td>
<td>High</td>
<td>implement your one small step</td>
</tr>
<tr>
<td>Risk #5</td>
<td>Medium</td>
<td>Medium</td>
<td>celebrate – you took a step!</td>
</tr>
<tr>
<td>Risk #6</td>
<td>Low</td>
<td>Low</td>
<td>find your next small step</td>
</tr>
</tbody>
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Thinking about the changes to come...
Thinking about the changes to come... 

...are you teachable?
“Effective, efficient information organization requires a highly trained cataloging and metadata workforce who regularly keeps their knowledge and skills current through continuing professional development in their specific areas…”

Tosaka and Park (2018)
What’s your next small step?
Resources

Staff training
https://hbr.org/2018/07/4-ways-to-create-a-learning-culture-on-your-team


http://dx.doi.org/10.21061/vilib.v62i1.1465

Guidelines and competency statements from library organizations


https://www.webjunction.org/documents/webjunction/Competency_Index_for_the.Library_Field.html

Micro-affirmations
[Also published in *Journal of the International Ombudsman Association* 3, no. 1 (March 2008)]

Pulse surveys
https://technologyadvice.com/blog/human-resources/top-5-pulse-survey-solutions/
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Finding Manageable Ways to Help Cataloging Staff Prepare for the Changes to Come

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