

## The Give and Take of Coordinating Concurrent Large and Complex FDLP Projects - Transcript

Good afternoon and welcome to the FDLP Academy webinar, the give-and-take of coordinating concurrent large and complex FDLP projects. This is Kathy Carmichael, and I will be here today as our presenter, James Rhoades. He's a social sciences librarian and depository coordinator at Old Dominion University library in Norfolk, Virginia, but before we get started, I want to walk you through our health to do reminders. If you have any questions you'd like to ask a presenter, or any technical issues, please feel free to use the chat box, in which people on desktop computers or laptops, is located at the bottom right-hand corner of your screen. James will answer questions as they come in. We are recording today's session and will email a link to the recording and everyone for this webinar. We will also be sending you a certificate of participation in the email you used to register for today's webinar. If anyone needs additional certificates because multiple people watched the webinar with you, please email FDLP outreach at GPO.gov and leave the title of today's webinar along with the names and email addresses of those participants. Desktop computer or laptop users may zoom in on a slide being presented. Click on the full-screen button in the bottom left corner of your screen to expand, and click on the blue return button to get back at the default view. At the end of the session we will be sharing this webinar survey with you. We will let you know when the survey is available, and a URL will appear in the chat box. We will very much appreciate your feedback after the session, including comments on the presentation style and the value of the webinar. Now I'm going to turn it over to James.

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Thank you so very much, Kathy. I'd like to just take a moment to introduce myself and come on live screen here. I hope everybody can see me. I just want to give you a little bit of my background. I've been at Old Dominion University since 2013. Prior to that, I was at Florida State University, down in nice and warm Florida. During my time at Florida State University, I started there in 2006, I had the opportunity to work alongside of and observe and watch, probably what I think to be one of the best librarians, and absolutely the best government librarians I've ever encountered, and her name is Marsha Goren. She's retired, but she's always in my thoughts, and I'm just so appreciative of all the things I learned from her, and I just wanted to say that at the outset. Now I'm going to turn my camera off and I'm going to do a little presentation. I hope it encourages you, and I hope that you can find some things hopeful that you might be able to apply in your day to day working with documents. Okay. So we are going to go to the next slide here and talk a little bit about the goals of the session, and I think this is important, because for myself, I'm the social sciences librarian, and another hat I wear, of many hats, is being the coordinator -- the dispositive coordinator at Old Dominion. But at a time -- I became that in 2013 when I arrived at Old Dominion University, and after about three years I was thrown a little curveball, and I'm going to talk about that in a second. So I'm hoping today that we can get to know one another. There is going to be some interactivity with this, and talk about planning and any plans should have some type of workflow, whether it's formal or informal, how you can really get the best out of people that are working with you, and not to get carried away with very unreasonable expectations. So, okay, this is slide three and this is where we can get to know one another. If you look at the screen, and you look under where it says file, yours might say quick start. I'm not sure, but there's a little arrow. I'm going to put my cursor over that, okay? Well, when you click on that, because it's off -- but if you click on it, then you can come to the mat and you can actually put a little arrow to say where you're from. So let's just get an idea where everybody is from. If you're on the telephone, I'm sorry that you might not be able to participate in this, and I'm sorry if you're international. Only for the United States. Wow, so there's a lot of people from all over. Okay, well. this is really neat. Nobody from Alaska today, or how about Hawaii? No,? Okay. Okay, so we are going to move on to the next slide. And I'd like to thank Ashley from GPO,

Ashley showed me how to do this. Okay. So how many people at your Institute process or work with government documents? What I'm thinking is that it's kind of like their primary task. At my Institute, it's really -- there's really only two of us. Okay, I've got a feeling nobody is going to click on that one with about 15 people. John, you're very fortunate you've got a lot of people. I'm envious. Okay. So we can kind of -- we are starting to see what people are encountering when they have to do their work. Okay, great. Thanks so much. Okay. How big is your depository -- at least your collection selection? When this project started for me, I was at the 50% to 75%. I think we are at 63%, which I thought was a lot. When I was down at Florida State, it was over 80, I think. There was a lot. Okay, so John, you must be a regional coordinator. Okay. okay. Does everybody like this? I don't know. Okay. So let me just give you a little snapshot of Old Dominion University. You know we've got 25,000 students, 5000 of those are graduate students. We do many different degrees. We have a lot of doctoral degrees. So I'd say we are a midsize Institute, a lot of faculty. and then, I'll talk a little about our federal depository program, in 2017. We've been a depository for over 50 years. I think it was 1963 where we came to the depository and the highlight of what we were doing was with the tonic resource and those are the types of documents we were getting. We get all formats from those people. Maybe that's what you all did. Only two staff members at least in 2017, right now, and in 2017 it was close to 55% collection. In 2017, we had 6804 linear feet of shelved items, and when I say shelved items, we are talking more the mono graphic type materials. I'm not talking vertical shelving or map cases or micro-materials, which we have a lot. There was a lot of that, too. And there was a large number of items that never got catalogued. So unfortunately, they were -- they were very difficult for users to discover. There was a card catalog, but it wasn't easily accessible, so I imagine most people were in that situation where there's a big collection, there is probably a lot of retroactive catalogs that never got to take place. So here's our next interaction here. So do some quick math. How long is 6800 linear feet? You can take your pointer and let's see, who's breaking out their calculators right now? okay. This is why I'm a librarian. I'm not super good with math, and I based it on 120 yards, which would be 360 feet, because I put the end zone's. So if you don't play football, if you're not familiar with American football, this might be more difficult. Okay. The correct answer is -- I think it's 19, possibly 19 football fields, so I just say 20. That's pretty long, right? This is actually an image of our shelving, our compact shelving for our depository, and we had 40 -- you'll notice I'm using past tense with a lot of things. We are going to talk about that. We had 40 ranges of materials, so just to give you an idea of what we had, well, you're probably wondering, what led to this. Well, I think a lots of people realized that 40 ranges or 20 football lengths long of linear feet, of shelving, it's a big footprint. So I imagine most people have experienced this, at least I have over my professional career. Space is a premium, and everybody wants the space. So the idea is to reduce the foot print, but not just reduce the footprint, but it was also -- the idea was to reevaluate our FDL program. This was scary, because this was back in the very beginning of 2017, and my library director is talking to me about -- well, you know, do we really need to be an FDLP? And that really sent shocks down my spine. I was like oh man, this isn't good, because I know how important government documents are. I know the benefits of being a depository. So you know this whole, should we stay or should we go, you know, but you have to think, you kind of have to give them what they want, and what I realize, that was the driving force behind all this, was the footprint, was the space, because the space is about 6000 square foot, about 3 or 4 of my houses all put together. So they've really -- there was need to get that space. so what was I to do as a government document librarian? What do you think? Which one of these that I go to? This could be interactive. Which one do you think I went to to get help? Well, I'm just going to put my arrow in the middle of nowhere, because none of these books were really going to help me figure out how to convince my director the true value. I'm sure there's many good things in both these books. Both of them are sitting right next to me, right now. So the idea was, I needed to come up with a good plan, and thankfully, at the time, this was 2017, I had one of the best regional depository coordinators in the country. I'd tell you all to try to give me some input in the chat, who you think that is, but I'll tell you, I'm

in Virginia. Can anybody go in the chat and take a guess of who that was in 2017? Regional depository coordinator for Virginia, anybody?

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James, while you're waiting for responses, we have a question for you. Would you like to take it now?

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Sure, I can take it.

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Milano wants to know how it was handled since the material wasn't catalogued.

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Okay, I will be getting to that. Just give me a couple moments. Anybody have a guess for who the regional depository coordinator was in Virginia in 2017? Here we go. Barbie Shelby. Yes! If you've ever had a chance to meet Barbie, I really apologize, is she's now retired, but she is just -- I tell you, she's one of the best. I put her and Marsha Goren right at the top when it comes to government document work. I was very fortunate. So what I did was I said hey Barbie, I need to talk to you. So that's the whole idea with creating a good plan, is talk to your regional depository coordinator, because in most cases, they've been around for a while. They understand things. They have a better knowledge base. You really need to talk to your regional depository coordinator, and luckily for me, Barbie is just the best, and she came from Charlottesville, East to Hampton Roads, to visit me at Old Dominion University. I said hey Barbie, this is what's going on. I don't know what to do. I want to find a way, and at first she scared me because she said you know what it will take a few are all programmed. I said I know, that's just going to be an enormous amount of work. It's going to be horrible, and I don't want to do that, and she said, I've got an idea for you. You're over here in Hampton Roads, and you've got one of the biggest naval ports in the world, and to top it off, you've got flooding here in Norfolk like nobody else, well, maybe New Orleans. So why don't you think about the Navy and the NOAA, the national oceanic and atmospheric administration, and try to become a center of excellence. I said Barbie, we are not members, and she said, you know what, you don't have to be a center of excellence. You just have to find one that hasn't been taken by more than two people. So I said okay, Barbie, and little did I know, she scared me with the idea of getting out of the GPO program. Little did I know how much work would be involved, following her idea, but -- we considered the options, the amount worked, and the benefits, to stay and remain an FDL, and to also become a center of excellence, was just such a wonderful thing. And I have to compliment the people, because to come up with a collaborative program and to call it centers of excellence, it's just -- it's so clever and so smart because it enabled me to be able to sell this to my library director, because who can say no to becoming a center of excellence, and we've got the regional depository for Virginia saying we are going to help you do this, and we are going to collaborate with you on this. So it was an easy sell, and that was really the easy part, was selling it, but you have to be prepared to carry out a plan when you do this, and you've got to be ready to do a lot of work. Okay. So what were ODU's concurrent projects? Okay, first one was to become a center of excellence, and that's a whole application process. We went through it and signed a memorandum of understanding, and then we needed to collaborate with our regional depository, because we didn't have all these documents. We had a lot because of our location, but to really be a center of excellence, to be that archive, we needed to get documents from our regional depository at UVA, University of Virginia. But remember, we needed the footprint, so then we also needed to do a massive weed of the collection. And when you're talking about 2600 or 6800 linear feet of a collection, not even thinking about maps and the micro, then it's a massive weed, you can only imagine. I'll give you a little hint on how big our collection is now. We went from 40 ranges down to less than 20, so we have -- we have to the collection and we really got more -- we really discarded more than half the collection, because we actually received over 6000 items from the University of Virginia, so we could fulfill being -- you know, having the most documents from our regional, for the center of excellence. So we needed -- the thing with this is you have to offer up items.

You have to discard items, and when you offer up the items, we use the disposition database that the University of Florida set up, and what a wonderful tool that is, and the University of Florida should really be thanked for their hard work to put that together. And then you have to put these documents that you're going to discard up for 45 days, and then you have to ship out any items that you claimed, and then I had to think about relocating after the week and then adding the materials from our regional, and then getting everything that comes from the regional process stand catalogued. So it was at this point when I was thinking about all these things that had to be done, I was thinking, man, part of me must not like me very much, because this is a lot of work. And remember there was only myself and one of our staff members that does this. So I thought well, okay, I'll do this until I retire in 30 years. This is going to take me forever. But little did I know that in March of 2018, my director came to me, and it was after a meeting. He said James, I'd like you to stay around. I need to talk to you. All of a sudden I felt like I'm in the principal's office, oh no, what did I do wrong. And he said, you know the project you're working on with the government documents, yeah, I need you to have that done, that space cleared by the end of August. So I kind of looked at him and it was kind of like, so you need me to have that done in six months, and that's when I think a major amount of fear set in, because I'm one person, and it made me realize that if this project was going to get done, there needed to be more than just me and another person, and the other person is Helen . She's just really great at what she does, and there was no way herself and I were going to get this job done, even if we had a couple students. So I said to my director, I said is this going to be a priority, and he said yes, this is going to be a priority. And I said well, it's going to take more than one person. It's going to take different departments because there's different things and I can't do it all. So he was agreeable with that. So the idea was hey, we've got a timeline, but I was like this stuff has got to be saved because before I can discard anything, I need to list it so people can claim it. And I started thinking about all these things that had to be done, and I thought, well, before I can even discard something, I need to decide, well hey, half of this stuff isn't even catalogued, and that's when you have to really work in cooperation with your regional depository coordinator, and you have to decide, you have to set down some things and say, well hey, if I've got something for 30 years, maybe it is a candidate that can be discarded, because it's not even discoverable, and working within a six-month time period, there was just no way that everything could be listed. Okay. so I started thinking about workflows and in regards to staffing, timelines, resources, all these things, and it really requires a great deal of work. Because it's just not easy, and once you get established, the people that you have that work with you, it makes things a lot easier. So this is just a little snapshot from the ASERL documents, disposition database, and you can see I drew an arrow. It's not the best arrow, so let me try to do that again. So you can see how to move this -- you can see right here where it says Old Dominion University. Just in that month of June, we listed almost 28,000 items and so we were doing thousands and thousands of listings for four months. but when I started all of this, it was more of a thought process than it was having things written down, because we didn't even have a simple work flow when we started. This was something that was put together afterwards, in hindsight, whereas we go to the next one, this is an example of a complex workflow. These are our workflows for GPO, kind of how we do things at Old Dominion University. But I didn't have these to work with. I hadn't -- it was more thinking about it, and that's when -- this is kind of my idea of workflows on steroids, because what do you think I mean by that? This is another interact thing to take your arrow and you can point one of the five things that you think this might mean. Is it thinking only about the numbers? Is it thinking about production output? Is it thinking people are machines? Thinking all items are equal, or even worse, thinking you can do it all. Carolyn thinks it's thinking you can do it all. Yeah, thinking about production output for Mark. Okay, if anybody else -- okay. Okay, this is how bad I got, because I'm thinking about timelines, and I came up with this simulated -- I used the simulator that we have at Old Dominion, and I thought to myself, you know, the answer to this workflow on steroids is all of these. All of these are the answer, because, you know, I got to a point where I was thinking about numbers and output, and I thought I

could think about people's machines, and I thought everything is going to be the same. So I came up with this, and for the top operator, I had slow, and the second one, I had medium, and the third one, I had, just your rockstar catalog, because this was after we had met our deadline at the end of August, when I started to get those 6000. I actually went and picked them up with one of my colleagues, Sam, and we drove to UVA from Norfolk, to Charlottesville, we picked him up and brought him back, and I think it was about 130 boxes worth of materials, so I started saying, because at this point, my library director said okay, so you met your first deadline, your second deadline is to get all new stuff processed, catalogued, and on the shelf, by the end of December. So he gave me September, October, November, December, to get something done that I'm not a cataloger. Nobody from cataloging reports to me. So I went to a meeting one day with everybody that was kind of working on this, and my library director or was there, and I passed this handout around, and I say, we can get this done, because based on the math, even if you had one slow, one medium, and one rockstar, you can still make the numbers work to meet the deadline. Of course, they all look at me and laughed, because they thought I was crazy. But this is what you do when you're thinking about trying to get a complex and concurrent projects done all at the same time. But you have to remember that there is no way, as a depository coordinator, that you can do everything your self. You're foolish if you think that, and -- but when you're nervous and you're scared, and you want to meet a deadline and get it done, sometimes you think you can, but these types of projects require getting help from many people, from across many different departments, and when I had the initial meeting back in March of 2017, with my library director, and he told me, hey, you have to have this done by the end of August, and I said hey, how can I do that, there's only myself and someone else, I need help, and that's when he said that I could go talk to people, and we started kicking around ideas. Maybe we can get students, and we talk the level of complexity of the work is too difficult for students, I would have two -- this would become a full-time thing. But it was a priority, and I was actually able to get help. We were able to -- I was able to get one person that could give me four hours a day, five days a week, from the cataloging department. Despite her being new, she had a lot of energy. Her name is Karen. She was smart and she was ready to work. So our first task, her first task would be we need to get everything listed that we are not going to keep on the disposition database, because if you don't get that done, then you can't discard anything. You can't move anything. So they're all working together at once, and I was also able to get my friend, Sam, that -- the head of the maintenance -- collection maintenance department, and a few of his students. Remember, this is the end of spring, going into the summer time, so we only had a few students. There was about 3 or 4, and they really did all the heavy lifting. I went through and I touched every document, and if you're talking about 40 ranges and you're talking about 6800 linear feet of documents, you know what I'm talking about. When you get to a big set of things, you're very happy, because it makes your life a little bit easier, but I turned a lot of documents. But I didn't have a lot of input on the team composition. Hopefully if you have to undertake something big, even if it's not this big, but it's something that's complex, and you require help from different departments, hopefully you can convince your director to give you some input, but the great thing, and the way that I found a way to make it work, was that it was a priority, so I was able to say to people in the other departments, you know, this is a priority, and my director backed me up on it. But the more important thing than the team composition is actually finding a way to empower your colleagues, and you know, realizing that you can't do it all your self, that people, every individual brings strength. They bring weaknesses, too, but finding those strengths and then playing off of them, and encouraging them, when it came time to process documents from the University of Virginia, my friend Sam, he works in the shelves and processing items all the time. So he was able to come to me and say, hey, here's a way I think we can streamline this, and we can really process it, and what I did was I sat down with him and I took some away. He suggested, and then I took some of what I saw, and we were able to make it work, and I was able to also do that with Karen. She was giving me 20 hours a week, and we worked very close. We collaborated. It wasn't me saying hey, let's do it this way, it was me saying,

Karen, what works for you, what way can we get the most out of this, and really be efficient with our time? The challenging thing is when it comes to reporting lines, and a lot of you may be in this situation where you have a lot to do for your depository, and maybe nobody reports to you. So it really creates a problem with accountability, and that was my situation, is there were a lot of people working on this project. I would say over probably, in total, anywhere from 15 to 20 people for all the phases of it, and none of them reported to me. So it's very difficult, and that's what made me really think, I want to talk about this project, because somehow we were able to get these things done despite that limitation of people reporting directly to the depository coordinator. And all of this made me realize that as a depository coordinator, you have to have reasonable expect Haitians, because if you think you can't be so rigid and not be flexible, you have to work with people, and realize that there's no way people are machines, and if you think you can try to predict how many documents any particular person can process or catalog at a given time, I'm not even sure that you can do that with your self. Workflows, you know, when you have them, whether they're informal or formal, you have to build some room in their to be flexible. And you never forget that some things are going to be out of your control, okay? So my friend Sam and I, we rented -- it was one of those big hurts -- it was actually an enterprise, big moving truck, the biggest one you could get, like 26 feet long, and we rented that in Norfolk and we drove it to Charlottesville to pick up the documents. Well, there's two ways you can get it to where UVA keeps those documents. Well, one way is underneath a railroad overpass. And I found out that if your truck is taller than that overpass, and I never told anybody this -- Sam knows it. We laugh about it. That truck will not go through there. So we had to back up, and if Barbie or trillion from UVA ever hears this, they'll probably know exactly what I'm talking about, and it was pretty embarrassing, but it was funny, so if your truck is taller than that railroad underpass, don't even try it. It's not a reasonable expect Tatian. Let's review just for a second. No projects will be easy. Planning certainly helps, that's for sure, and remember when you're planning, to always listen to others and be flexible, because that's what's going to help you be successful. It's a good thing if you can come up with some formal workflows. So things are laid out, so if you're not there, somebody else can kind of look at it, keep things going. But at the end of the day, it's people that make things happen, and if you try to do it on your own, you never will, but being realistic is also critical, and thankfully, and I'm going to read this, document librarians and document staff are the smartest and the best, and I truly believe that, and from all of my time doing this, since 2013 at Old Dominion University, and times before that at Florida State University, there's nobody smarter than a document library and, and I just thought I'd include a picture of my friend, Marsha Goren, from Florida State University. It's with deep affection that I just want to thank her and let her be a part of this. She is literally the smartest librarian I've ever known. But thank you so much, and if anybody has any questions, I'll be glad to answer them.

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Okay, James. We can take a minute or two for anybody to get their questions chatted in.

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Of course I'd like to thank everybody for attending today, and I wish everyone happy holidays.

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Mary Clark knows exactly where the truck got stuck.

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I hope I didn't go too fast, and I hope that everybody found something helpful out of this. If anything, please know and be encouraged that people do appreciate all of your hard work has document librarians and document staff. It's a very worthwhile thing, and I know that users across our country appreciate it.

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Ron Jones would like to know -- Ronnie is not in gov docs. Trying to step in and help my boss when he's overwhelmed, mostly with ASERL. Do you have any ideas so I can get more information to help me with this?

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Well, I would say Ronnie, first place you want to start, is make sure you're familiar with the documents on ASERL's site, toward the center of excellence, and then also, if you're going to need to talk to the regional coordinator, because they're going to be able to give you insight on how you can go about the -- discarding items, because they can give you permission to do things that you might not be able to have. You shouldn't do it on your own without getting permission, and that's something that if Barbie wouldn't have coordinated with us very closely, this wouldn't even have been possible. So everything that we were able to do in such a short time, not even 12 months, was thanks to Barbie Shelby and to her expertise and knowledge.

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Ashley just pushed out the webinar survey. We would really appreciate if you would submit this, because we do make changes and adjustments based on what we hear back in the survey.

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Kathy, do I get to do this, too? Because I think the presenter was great.

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You know, if you want, go ahead.

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I think laughter is a good thing in life.

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Yeah. Okay. Carolyn, Carolyn Hilson, can you talk about the FDLP preservation program and the center of excellence program? Why do they lean towards one another? Do they work together somehow?

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I'll let anybody out there that thinks they can answer this, to answer.

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Now you are not a preservation steward for Navy and NOAA, are you, James?

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I don't think so, I think those are a little bit different.

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Preservation stores are with GPO, and you know you're well-kept to do that with your Navy and NOAA. I don't know if NOAA can do that.

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Kathy, the great thing is Old Dominion University did that, we wouldn't have to go through the discard process again, which would be wonderful.

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Actually, can you unmute Abby? One of our collection librarians said she can speak to the question.

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Hi everyone, can you hear me?

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Yes.

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Okay, great. Actually Kathy basically said this, but any ASERL CO Es can also become preservation stewards for the same collection. You just have to reach out to GPA, through our partnership page. Thank you for posting that. I was going to post that, as well. Reach out to GPO through our partnership page and we can talk about it with you. You can also become preservation stewards and not be ASERL

sectionals obviously if you're not in the ASERL system. So it just thank you for the opportunity to respond to that question.

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Thank you, Abby.

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Okay. Do we have any more questions? I don't think I missed anything. if not, we'll go ahead and close this webinar out. James, thank you so much for that webinar. It was very interesting.

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Thanks, thank you, Kathy.

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I was reliving some of my own depository coordinator days, when you talked about that. That would've been helpful about five years ago. okay. Everybody, thanks for attending. Just keep your eyes out for more gov DOC 101 webinars. Our next one will be in January, on legislative history, and we should have an announcement coming out about that very soon. All right, have a good afternoon, and happy holidays, everyone. [ Event concluded ]