BHL Staff Activities Report

**POST PROCESSING WORKFLOW**

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| **Issue** | **Quick Win** | **Challenge** |
| Lowering % of unresolved issues (currently at 29%) | Workflow: Grace performs issue triage and assigns issues to appropriate BHL member library staff | Managing follow-up on issue assignments – varying levels of participation by BHL member library staff |
| Communicating with users after they have reported a problem | 1. Auto-response: “thank you for your feedback”  2. Implementation of [feedback@biodiversitylibrary.org](mailto:feedback@biodiversitylibrary.org) Gmail account to respond to user feedback | Dividing up and sharing the workload to increase turn-around times in responding to user inquiries.  Some user inquiries are going unanswered. |
| Improving staff participation in the post-processing workflow = Technical tools + Communication mechanism | To convert to hosted Gemini system ($1500/yr)  Upgraded system to address major staff needs | Proposal to implement a mandatory “buddy system” |
| Reducing the number of user-reported problems | 172 PDF issues reported  Staff working w/ Mike L. to change the workflow for users creating their own PDFs | Encouraging users to download the entire book via IA, NOT through the create-your-own PDF process  Some users significantly slowing the PDF processing and delivery queue for others |

**PORTAL EDITING**

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| **Issue** | **Quick Win** | **Challenge** |
| Staff training: Empowering all staff to perform portal editing for their own contributions to BHL | “Help” link implemented on Admin Dashboard (Mike L.) provides how-to documentation to fix title and volume errors | Implementing additional portal editing modules to address:   1. author/creator 2. bound-withs |
| Fulfilling user requests to fill in gaps for incomplete monographic series and serial volumes available in the portal | Using Gemini to communicate among staff to get the gaps filled  FedEx acct funded to support gap fulfillment from non-scanning BHL member libraries (Bianca to develop process and administer) | Bidlist tool is unreliable; many bids to not match against content actually scanned  Need for more regular communication among BHL members where Gemini falls short  At times, we are simply unable to fill gaps, esp. for ingested titles |
| Users need page numbers articulated, esp. to identify plates and create their own PDFs | Interns @ MCZ, Cal Academy, and Field have been manually inserting page numbers | Long queue of books needing pagination. Need for more resources and an improved pagination tool. |
| Accessing 1 scanned item/title from multiple bibliographic descriptions (volume in a serial vs. title in a monographic series) | Work-around proposed to handle major serial publications/monographic series such as *Fieldiana* and *Memoirs of the MCZ* | Current data architecture does not support discovery and access of items with multiple bibliographic descriptions |

**METADATA**

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| **Issue** | **Quick Win** | **Challenge** |
| Are we legally able to share our metadata with other major institutions/library organizations? | OCLC example – agreement under review to allow OCLC to download and use BHL metadata in WorldCat for the assignment of new ISBN nos. | How would other institutions be able to obtain an export of BHL metadata for their institutional catalogs?  Requests received from (via Gemini):   * Stacy Pober, Manhattan College * Judith Emde, University of Kansas |

**WORKFLOW**

Who is still scanning: MCZ, MOBOT, NHM, NYBG, SIL

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| **Issue** | **Quick Win** | **Challenge** |
| Ensuring high quality of scanned material | Some retrospective and post-scanning QA underway at AMNH, SIL, MCZ  Just-in-time QA happening as a result of user feedback | Not enough time and resources available to implement standardized QA best practices as part of scanning workflow |
| Fulfilling user requests for content they want added to BHL | Using Gemini to communicate among staff and process requests | Supporting increase in amount of user requests received  Maintaining queue of requests that cannot be processed |

**COMMUNICATION**

**External**

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| **Issue** | **Quick Win** | **Challenge** |
| Some users experience difficulty finding the content they need and downloading PDFs [~20% of Gemini issues concern problems downloading PDFs] | Video user tutorials have been developed and are linked directly into the BHL portal (see “Tutorials” link) | Taking time to develop narrative tutorials (that can be printed out) in different languages  Improving the BHL FAQ |
| Members of BHL global have requested membership to the public facing wiki |  | Policy decision: who should be able to join/edit the public facing wiki? |
| Communicating with users about what BHL is and providing documentation explaining BHL services | Public facing wiki implemented along with continued release of information via blog posts and twitter posts | Few resources available to maintain public facing wiki and keep information up to date |
| Collecting feedback about what users like and do not like about BHL to direct project developments for the future | BHL Survey launched March 15, 2010 as a joint effort with BHL-E; available in 6 languages; already 421 respondents! | Incorporating results of the survey into project planning |

**Internal**

* Collaboration success!
  + Rotating responsibility for monthly staff calls
  + Outstanding Collaboration Citation awarded by the Association for Library Collaboration and Technical Services (ALCTS)
  + Committees with regularly scheduled conf calls work best. Need to secure a reliable BHL conf call line – staff looking into possible solutions.
  + Staff training/documentation via wiki pages and how-to guides created ex. portal editing
* Communication strategies
  + **Short term issues vs. long term issues:** Communication among BHL staff works well for short term issues (quick wins). Concerning long term issues (challenges), communication may break down, momentum may be lost and ultimately, issues may remain unaddressed.
  + Staff do not understand how to pass information up the decision chain. Issues may need buy in from Tom G., Chris F., the EC, the IC, Martin K. – what is the best way to communicate these decision points for the future? Should there be a chain of command? Where does Mike L. fit in?
  + Decisions that address BHL challenges need to be formally documented both internally and externally where appropriate.

**DECISION POINTS**

* Do you approve of the “BHL Buddy System” proposal? Should participation be mandated?
* What is the appropriate decision tree or chain of command to address BHL challenges?
* Who should be able to become a member of the public facing wiki?