HIRING ELECTRONIC RECORDS STAFF

Different Approaches and Their Experiences

SERI Educational Webinar
Tuesday, July 8, 2014
2:00 pm Eastern

ACKNOWLEDGEMENTS

This project is made possible by a grant from:

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THE BIG PICTURE

Framework

Digital Preservation

Staff

| IT to Archivist | Archivist to IT | ER Archivist to ER Archivist |

POINTS OF DISCUSSION

- Train someone already on staff

- Hire IT professional & train on archival principles

- Hire Archivist and train them in IT

- What are the skill sets of potential employees coming out of school?

PRESENTERS

Dave Joens
Director
Illinois State Archives
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Matt Veatch
State Archivist
Kansas State Historical Society
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Bryan Collars
Archivist
South Carolina Department of Archives & History
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HIRING AN ELECTRONIC RECORDS ARCHIVIST

At the Illinois State Archives

Dave Joens
Director, Illinois State Archives

HISTORY

- Having an electronic records archivist on staff was on the long range plan 13 years ago

- Began looking for one ten years ago

- Early applicants touted their scanning experience

HIRING HISTORY

- We hired a long time archivist/records manager.
    *Had some computer background.

- We hired an IT person with no Archives/RM knowledge.

- We hired a fresh graduate of Library Science school.

JOB DESCRIPTION AND DUTIES

- Borrow heavily from other states.

- Know if the position is Archives/RM or both.

- Be specific on duties.

- Don't underestimate speaking/writing abilities.

- If possible, place directly under the director.

SKILLS NEEDED

- Has to know records management systems.

- Archives/RM knowledge important.

- Knowledge of government experience nice but teachable.

- Ability to present ideas verbally and in writing.

- Ability to translate from IT-ese to Archives/RM-ese and back.

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PROMOTING/TRAINING FROM WITHIN

- I don't see the IT background. It isn't computers. It is RM systems.

- For a first time hire, it is nice to shake things up with an outsider.

- Promoting from within leaves a hole in the staff that, in the future, will be filled with input from the new hire.

MEET OUR
ELECTRONIC RECORDS ARCHIVIST

Kristopher Stenson

- Master of Library Science, Archives Specialization (2011)

- Master of Arts, Early European History (2005)

- Bachelor of Arts, History, (2002)

INSTITUTE of **Museum**and**Library** SERVICES

SERI State Electronic Records Initiative

CoSA

COUNCIL OF STATE ARCHIVISTS

ARCHIVIST OR TECHNOLOGIST?

That is the Question

Matt Veatch
State Archivist
Kansas State Historical Society

REQUIRED SKILLS

- ARM Fundamentals
  - Scheduling
  - Appraisal
  - Description
- Subject Matter Expert
  - ERM/DP standards and best practices
  - ERM/DP projects and initiatives
  - ERM/DP training opportunities
  - Technology watch
- Business Analyst
  - Business process analysis
  - Information systems analysis
  - Records analysis

REQUIRED SKILLS

- Technology User
  - Completely comfortable with all aspects of technology as a user
    - Office apps
    - Databases
    - Social media
    - Mobile technology
  - Technology well integrated into work life
- Collaborator
  - Interpersonal skills
  - Basic fluency in several languages:
    - ERM/DP
    - IT
    - Business process analysis
    - Archives
    - Everyman
  - Negotiations (vendors/inter-organizational)

REQUIRED SKILLS

- Technologist
  - Coding
  - IT infrastructure knowledge
    - Storage
    - Networking
    - Security
- Policy Development
- Trainer
- Marketing & Sales
- Change Management

Type	Skill	IT	Archivist	RM	Expected Level of Knowledge
Hard	Appraisal	(Red)	(Green)	(Green)	(Green)
Hard	Business Process Analysis	(Yellow)	(Yellow)	(Orange)	(Orange)
Hard	DB (Access, Sql, MySql, etc..)	(Green)	(Yellow)	(Orange)	(Orange)
Hard	Description	(Red)	(Green)	(Green)	(Green)
Hard	ERM/Digital Preservation: Standards & Best Practices	(Red)	(Green)	(Yellow)	(Green)
Hard	Information System Analysis	(Green)	(Red)	(Red)	(Orange)
Hard	Mobile Technology	(Orange)	(Green)	(Green)	(Orange)
Hard	Office Applications	(Green)	(Yellow)	(Green)	(Green)
Hard	Preservation: OAIS, ISO16363, PAIMAS, PREMIS	(Red)	(Green)	(Green)	(Green)
Hard	Projects/Initiatives	(Yellow)	(Green)	(Yellow)	(Orange)
Hard	Records Analysis	(Red)	(Green)	(Green)	(Green)
Hard	Scheduling	(Red)	(Green)	(Green)	(Green)
Hard	Social Media	(Yellow)	(Green)	(Orange)	(Orange)
Hard	Technology Watch	(Green)	(Red)	(Yellow)	(Green)
Mixed	Providing Training	(Yellow)	(Orange)	(Green)	(Orange)
Soft	Vocabulary Fluency in : Archives	(Red)	(Green)	(Yellow)	(Green)
Soft	Vocabulary Fluency in : Bus Process	(Orange)	(Red)	(Green)	(Orange)
Soft	Vocabulary Fluency in : EDRM/Pres	(Red)	(Yellow)	(Green)	(Green)
Soft	Vocabulary Fluency in : Everyman	(Yellow)	(Orange)	(Green)	(Green)
Soft	Vocabulary Fluency in : IT	(Green)	(Red)	(Yellow)	(Green)
Soft	Interpersonal Skills	(Orange)	(Orange)	(Orange)	(Green)
Hard	IT Infrastructure – Networking	(Green)	(Red)	(Red)	(Yellow)
Hard	IT Infrastructure – Security	(Green)	(Red)	(Yellow)	(Yellow)
Hard	IT Infrastructure – Storage	(Green)	(Yellow)	(Orange)	(Yellow)
Hard	Coding	(Orange)	(Red)	(Red)	(Orange)
Hard	Policy Development	(Yellow)	(Green)	(Green)	(Green)
Mixed	Change Management	(Green)	(Yellow)	(Green)	(Orange)
Mixed	Marketing (External/Internal customers)	(Yellow)	(Green)	(Green)	(Green)
Soft	Negotiation (Vendors /Interorganizational)	(Orange)	(Orange)	(Orange)	(Green)

		IT	Archivist	RM	
	29 Skills - How many Expert (Green)	9	9	8	
	29 Skills - How many Advanced (Orange)	5	3	10	
	29 Skills - How many Intermediate (Yellow)	7	10	8	
	29 Skills - How many Basic/Unskilled (Red)	8	7	3	
	19 Hard Skills - Meets Expectations	10	11	12	
	19 Hard Skills - Does NOT meet Expectations	9	8	7	
	10 Soft Skills - Meets Expectations	3	5	3	
	10 Soft Skills - Does NOT meet Expectations	7	5	7	
	8 Preferred Skills - Meets Expectations	5	4	3	
	8 Preferred Skills - Does NOT meet Expectations	3	4	5	
	21 Required Skills - Meets Expectations	8	8	12	
	21 Required Skills - Does NOT meet Expectations	13	13	9	

"REAL" WORLD EXPERIENCE

- Archivist to Electronic Records Archivist
  - Can be successful

- Technologist to Electronic Records Archivist
  - Can be successful

- Electronic Records Archivist to Electronic Records Archivist
  - "Born digital" archivists exist
  - We need to attract them to state archives!

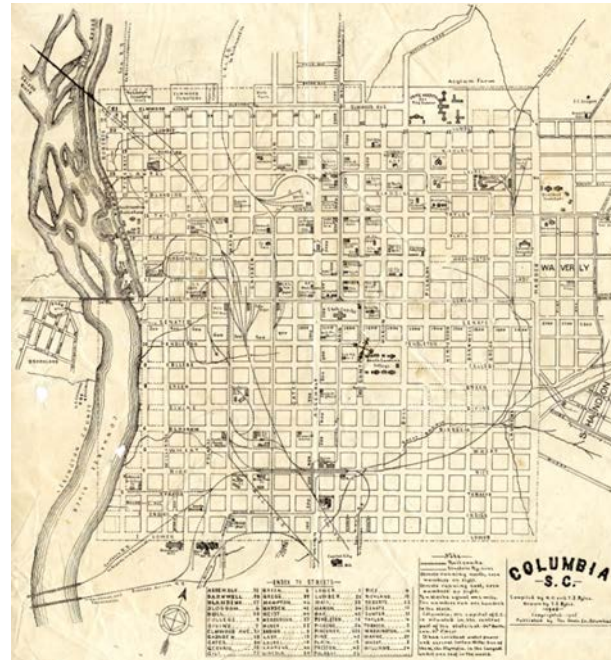# HIRING ELECTRONIC RECORDS STAFF

Bryan Collars
Archivist
South Carolina Department of Archives & History

ROAD MAP

- SCDAH Experience

- Rights and Wrongs

- Its an Electronic Records Archivist

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SCDAH EXPERIENCE

- Legislative approval for new professional staff

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SCDAH EXPERIENCE

- Legislative approval for new professional staff

- Who knows how to hire a new staffer?

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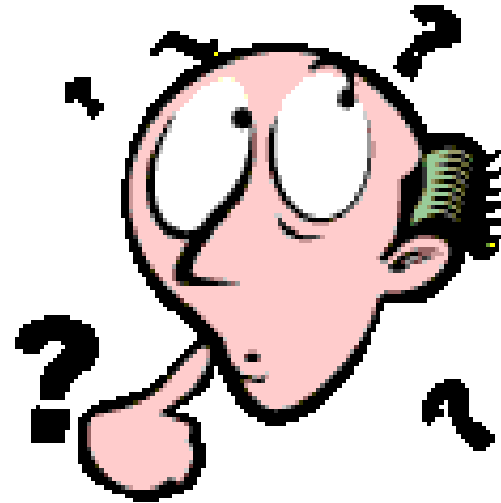
SCDAH EXPERIENCE

- Legislative approval for new professional staff

- Who knows how to hire a new staffer?

- The job announcement!!

Print Job Bulletin

Job Responsibilities	Benefits	Custom Form Fields

This is a re-advertisement. Previous applicants are still being considered and do not need to re-apply.

Under general supervision, works as part of a project team to administer policies and help state agencies and local governments develop procedures and practices for managing their electronic records and systems. Serves as an electronic records archivist with primary responsibility for identifying, preserving, and providing access to archival electronic records. Plans, develops, and implements electronic records management processes, guidelines, and procedures in state agencies and local governments and tests approaches to address long-term preservation and access issues. Plans, develops, and implements procedures for preserving and providing access to the archival electronic records acquired by the department and those remaining in the custody or agencies. Conducts projects to identify, appraise, and develop retention schedules for state agency and local government electronic records, and other duties as assigned.

Minimum and Additional Requirements:

Knowledge of general archival and records management concepts; general knowledge of electronic records issues; Basic knowledge of hardware and software used for electronic document management systems, digital imaging systems, and desktop applications; knowledge of database management , systems analysis, and systems development concepts; some familiarity with metadata and related standards for information processes and their application to archival or record materials; and knowledge of data storage methods, media, and security. This position is critical to the success of the electronic records program and its related goals of providing for the long-term preservation and access issues. Plans, develops, and implements procedures for preserving and providing access to the archival electronic records acquired by the department and those remaining in the custody of agencies. Conducts projects to identify, appraise, and develop retention schedules for state agency and local government electronic records, and other duties as assigned.

Preferred Qualifications:

A Graduate Degree In Library and Information Science or Public History and/or Graduate Training in Archives Administration, Records and Information Management.

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SCDAH EXPERIENCE

- Legislative approval for new professional staff

- Who knows how to hire a new staffer?

- The job announcement!!

- The applicants

- Application review

- The Interviews

THE APPLICANTS & APPLICATION REVIEW

- Broad and varied range of applicants

  Security Guard   Paralegal   Administrative Asst.

  Sorority Advisor   Social Workers   Insurance Agent

  Recent Graduates of Library Schools

- Application review
  - Eliminated 90% of the applicants just by reviewing their resumes/applications/or CVs.
  - Common issues for rejection: Lack of formal training; no understanding of ER issues; and interests really lie elsewhere.
  - A successful application primarily three things:
    1. MLIS or Archival Admin Degree
    2. Internship or Workstudy position in an archival setting
    3. An exposure/familiarity with Metadata Schemas, Archival Software and programming languages (C++, SQL, Visual Basic, etc.)

THE INTERVIEWS

- How conducted

- Principle questions

- What is it with digitization?

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THE INTERVIEWS

How conducted

- Phone

- In Person

- Skype

THE INTERVIEWS

Sample Questions

- What do you think are the biggest challenges for managing electronic records currently? How might this change over the next 5 years?

- Tell about your experiences with open source software.

- Discuss how the use of proprietary software as it relates to archives and the long term storage of electronic records.

- What is a file naming convention and why is it important?

- What archival software have you utilized?

THE INTERVIEWS

What is it with digitization?

- Many applicants read "Electronic Records" and equate it with digitization.

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RIGHTS AND WRONGS

- Don't rely on just your state's jobs portal

- Do post the position announcement on professional job posting sites (SAA, etc.)

- Know that employment agencies mine job posting sites

- Don't rely on HR staff to weed out unsuitable applicants

- Do ask pertinent technical questions

MEET OUR
ELECTRONIC RECORDS ARCHIVIST

Brian Thomas

- Masters of Information Sciences, Archives Specialization (2013)

- Bachelor of Arts, History (2004)

PRESENTERS

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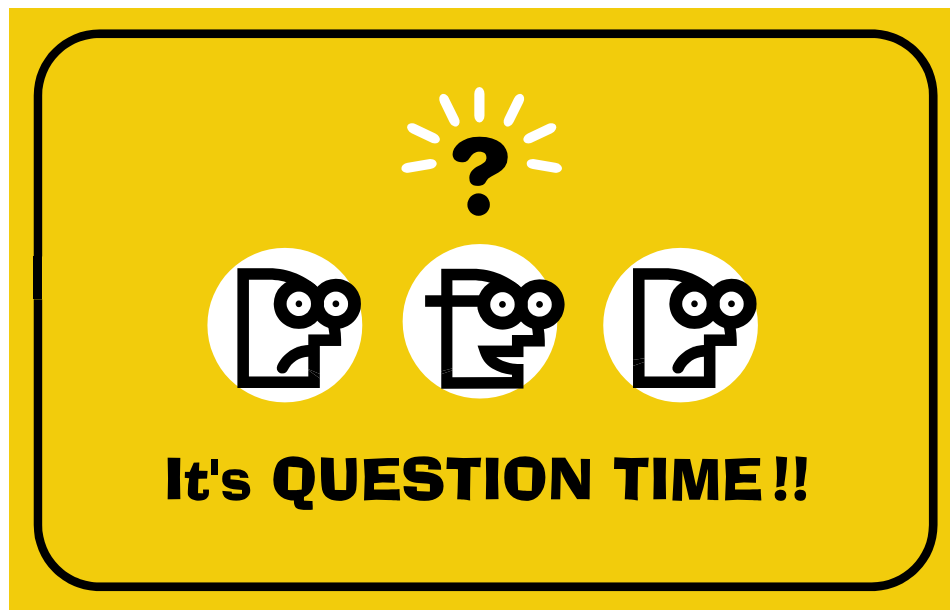djoens@ilsos.net

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QUESTIONS & COMMENTS

It's QUESTION TIME!!

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WRAP-UP

- <u>Just Released: Staffing for Effective Digital Preservation: An NDSA Report</u>

- Post-webinar evaluation will automatically open in your web browser when you exit the session.

- Next SERI Educational Webinar is Tuesday, July 22 @ 2:00 pm Eastern
  - Topic: PERTTS Portal Overview

- Complete webinar schedule is available on CoSA's website:
  http://www.statearchivists.org/CoSA_Webinars.htm

- All webinar slides available from the SERI webinar page:
  http://www.statearchivists.org/seri/STEP/SERI_Educational_Webinars.htm