

Assessment of DC National digital Stewardship Residency Program

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This document is an assessment of the initial year of the National Digital Stewardship Residency (NDSR) program which ran from September 2013 through May 2014, placing ten recent graduates from MLIS (or similar) programs into 9-month Residencies in a variety of institutions in the Washington DC area. The program was funded by the Institute for Museum and Library Services (IMLS) and administered by the Library of Congress (LC). The program has spawned NDSR programs based in Boston and New York City beginning in September 2014, and will be resumed in Washington DC in 2015.

In order to inform the descendants of the initial NDSR program, the orientation of this assessment is towards learning lessons from the initial DC cohort that can strengthen the programs for those later cohorts. Many of the early observations and incomplete findings from this assessment were shared with the administrators of the Boston and NYC cohorts in time for them to plan accordingly.

Methodology

The contract for assessment was not approved until late April 2014, and there was no opportunity for collecting baseline data for comparative purposes. Therefore the assessment is based primarily upon qualitative data gathered beginning May 2014. The assessor also examined a wide variety of documents generated during the life of the program, including training documents, work plans, and a variety of reports by both Residents and by their Supervisors. But the assessment is primarily based on self-reporting from the various individuals involved in the program.

The most illuminating data came from two lengthy focus groups and follow-up interviews. The evaluator prepared approximately 50 topic areas to interrogate, with a slightly different set for the Residents than that for their Supervisors. One focus group was attended by all but one of the direct Supervisors in the Resident-hosting sites, as well as a higher-level administrator from one of the sites. The missing Supervisor (who had taken a job at another organization) was interviewed separately, and her responses were quite consistent with the sentiments expressed in the Supervisor focus group. The second focus group was attended by the eight remaining (of the ten initial) Residents¹ with one of the two non-attending Residents contributing real-time responses to some of the questions via instant-messaging between her and one of the attending Residents.

¹ Two of the Residents departed early to take jobs outside the DC area.

Focus group attendees were guaranteed anonymity in terms of attributing their remarks. An audio recording was made of each focus group session, and was erased after the assessment was completed.

Findings

Importance of the Program to the Hosting Organizations

Though the Residents made harsh critiques about the mechanics of the program, the overwhelming sentiment among all Supervisors and Residents was that the program was both important and valuable to both participants and to the institutions involved. The value was much broader than learning skillsets; it also included anthropological, cultural, educational, and organizational dimensions. The Supervisors repeatedly used terms like “transforming” and “transformational” to describe the results of having the Resident embedded in their organization for that length of time. And one Supervisor referred to the Residency period as “a big win” for both the organization and the Resident. Another organization felt that the Residency was so important that they created a separate tab for it in their annual report to their Board.

One Supervisor talked about “a generational dimension to this—older professionals learning from younger; a generational impact.” Another mentioned that “we can learn from her, she can learn from us.” Another said that having a Resident embedded in the organization for so long became “like an anthropological study; holding up a mirror to our organization.”

The prestige of being selected by LC and IMLS to host a Resident had an internal effect on a number of the institutions. The endorsement of being selected by these outside bodies in a competitive process raised the profile and priority of digital questions within the organization.

Several Supervisors talked about positive institutional effects of just having a resident dedicated to digital curation issues. One said that this provided an “extremely valuable” function of raising the awareness of these kinds of issues within the institution as a whole (not solely one department or committee). Others discussed the value of having one person who could focus on these issues fulltime, without having to worry about other duties. Another felt that having the Resident made it easier to answer questions from management. Others discussed the value of having a fresh person coming from outside the organization to ask both naïve and probing questions, but who became close enough to the organization to transcend being an outsider. Still others mentioned that the Resident brought a knowledge base and skillset that was not previously present in the organization.

One of the most important effects of the Residency cited by multiple Supervisors was “silo-busting”. Because a number of the Residents had cross-departmental responsibilities, the Resident was able to cross departmental silos in ways that even a long-time employee given new cross-departmental responsibilities was not able to (because other departments continued to identify them with their prior departmental home). Residents were often seen as fresh faces with no alliance to the culture and perspectives of a particular department, and thus were able to seriously cross borders between previously isolated departments. And in some cases their recommendations for inter-departmental sharing were taken more seriously than they would have been coming from veteran employees.

More than one Supervisor had initial fears that hosting a Resident would involve “baby-sitting”, but they were instead surprised that they ended up hosting “a well organized and formal person”.

In general, the Supervisors felt that their Resident helped them learn more about the complexity of digital stewardship. One said that they now know that it involves a large learning process, with the need to balance challenge and expectations. Another said that the Resident helped them learn about the digital world and what types of platforms are out there; sometimes confirming what outside consultants had previously said, and in other cases defining the landscape in newer ways. Another said, “Before we can even think about the technology, we need to put in place workflows and communications.”

One Supervisor felt that hosting an NDSR event at their institution had both “strategic value as well as important programmatic value”. He said that it had significant impact on higher-level administrators that “will pay strategic dividends for us down the road”.

And some Supervisors saw their mentoring of a Resident in a national context: “Not only a chance to contribute to an individual, but to contribute to the profession on a national scale.”

The Supervisors were all in general pleased with the Residency, feeling that all their initial hopes and goals had been met. Their consensus was that the Residency delivered at least as much as it had promised at the outset. But they were unclear as to whether the Residency had met LC’s goals. (further details about this are in “Administration of Program” section)

In terms of sustaining the Residents’ work, a number of the Sites did focus on handing over the Resident’s findings and continuing work to regular staff, but not all were able to mainstream these into regular organizational activities. In some cases this was due to staffing issues (not enough staff, no staff with the proper training or background, a time gap between when the Resident left and when they would be able to hire for a new position), and in other cases it was due to poor planning. *The central NDSR Administration should stress the importance of a transition plan that*

makes sure that the Resident's work will be picked up after the Residency ends. And they should stress that part of being a good digital steward requires planning the transition of their own departure.

Importance of the Program to the Residents

The Residents were glad that they went through the program, but were very frustrated about operational aspects of it. Many of the issues can be attributed to this being essentially an experiment that no one had tried before. It is important that future iterations of this project attempt to address these issues, and the large number of items that need to be addressed are spread throughout this assessment (and indicated with *Italic script*), as well as gathered together in the section "*Recommended changes to the Program*". The foremost issues revolve around increased clarity (of expectations, tasks, deliverables, schedules, commitment, etc.) and the issue of status (that Residents should have a much higher status than Interns, and should be treated accordingly). The consensus was that they would happily engage in this again if issues of clarity and status were ameliorated. And the Residents all said that they would love to mentor and host a Resident sometime in the future.

The Residents all felt most proud of the Projects that they completed. They felt that they learned technical, project management, administrative, and collaborative skills. They felt a sense of accomplishment at completing a lengthy and involved project likely to have a direct impact on their organizational host. And they all felt confident about giving public Talks about their projects at professional conferences and meetings. Several mentioned that they now feel more immersed in the field (through going to conferences, knowing the scope of what people are doing, common problems, etc.), and that they feel more confident about their own knowledge base now that they're aware of wide knowledge gaps around digital curation among library world professional colleagues.

There was not a consensus among Residents about how much that they had really learned in terms of digital curation skills. One said that s/he had only marginally more experience than before. One felt that they had developed a niche expertise that they could export to certain jobs tasks in the future but not others. Another felt much more qualified than before, but still felt that there was an enormous number of further important skills that s/he still hadn't learned. And almost all of them felt that they were much better positioned for future jobs because of the experience, though one or two felt that this was just because the Residency looks good on a resumé. One said that s/he didn't feel more competent, but did feel more marketable.

Most felt that the most important thing they got out of the Residency involved people. There was near-consensus that the very strongest part of the Residency was

the cohort. Several months into the Residency they began having weekly informal gatherings amongst themselves which led to sharing of common problems, lobbying for changes in the program, and to the planning of a professional event. They also felt that the professional connections that they made through the Residency were critical to their future careers. One even remarked, “We made professional connections that will pay off. As far as my project goes, that I’ll forget about.” (even though the project was cited as the most important part of the program)

Though the Residents focus group did not discuss it, the Assessor believes that one of the key things learned through the Residency was the reality of how cultural institutions operate. The Residents gained significant experience in inter-departmental conflicts, encountering delays because a key staff member needed to take care of higher-priority items, managing cross-departmental projects, bureaucratic snafus, etc. – all experiences that were not likely discussed in their MLIS programs.

Program Administration

The Residents were highly dissatisfied with the program administration, and cited approximately 50 specific problems they experienced. Most of these problems can be clustered into the specific areas: Lack of administrative resources, Lack of clarity, Lack of status, and Better communications.

Lack of administrative resources

- Most Residents and Supervisors cited a serious decline in central administrative support for the program when the interns assigned to help the central LC program administration left and were not replaced. Several went so far as to claim that “the program started to fall apart after that”.
 - *It seems clear that additional staff need to be committed to managing the program. Beyond that, some of this perception appears to stem from the fact that the interns’ only job was to support the Residencies, while higher-level administrative staff had responsibilities for managing a variety of programs. Perceptually, it would be advantageous to have a single “go-to” staff member as point-of-contact for the Residents and a higher-level administrator seen as devoting perhaps 40% or more of their time to the Residencies.*
- Residents and Supervisors felt that they had nowhere to turn for more technical digital curation issues. They felt that some of this should be supplied by the central program administration, and at times they felt lost. This affected both regular work, but more importantly they wanted someone who could read interim reports, help advise them on continuing education during the Residency, etc.
 - *There are several ways that this could be handled:*

- *Have someone with a digital curation background as part of the administrative staff*
- *Re-assign some NDIIPP staff to be on-call to get involved answering questions, reading reports, and advising on continuing education*
- *Ask an outside Board of Advisors to periodically devote time to do this kind of advising*
- *Develop a dual-mentoring system (Resident direct supervisor + outside digital curation specialist assigned to each Resident), as the NYC NDSR project plans to do*
- Both Supervisors and Residents were unhappy at what they regarded as the low compensation given to Residents. Some of this was due to many Residents not realizing the tax implications from the lack of income tax withholding (only realizing this at tax-filing time). But, in general, the sentiment was that the compensation was low for professional work in the DC area. This feeling of being “underpaid” led the Residents to feel more cavalier about leaving the Residency early to take a permanent job.
- Supervisors would like the central administration to facilitate the building of a community wider than just the Residents (who organized weekly meetings amongst themselves, as well as a public event at NLM).
 - *The supervisors thought that LC should go further in facilitating the Residents in terms of getting them together regularly, encouraging them to plan grassroots events (like at NLM), etc. They also felt that LC should facilitate interactions between the Supervisors (like lunch every other month, monthly teleconferences, a group email chain, etc.). This would be like a cohort model for the Supervisors. They also expressed a desire for arranging formal visits to each others’ site (but the Assessor has some skepticism as to whether this fits with their time constraints).*

Lack of clarity

- Residents felt a lack of clarity as to expectations, tasks, deliverables, schedules, commitment, etc.
- Both Supervisors and residents were unclear as to the goals of conference travel and professional development activities. Were these primarily a learning opportunity for the Resident? Or a way of promoting the Residency Program as a whole? Or of highlighting the Resident’s main project? Or some combination of these?
- Though all the Supervisors were clear about their own goals in hosting a Resident, many of them were unclear about what LC’s and IMLS’s goals were. They felt that they could have better contributed to the Residents’ professional development if they had better understood LC’s and IMLS’s learning objectives.

- Most Supervisors felt that they took on the supervision of a Resident on top of their pre-existing fulltime work duties. There was no resentment over the additional time required, but Supervisors did feel pressure from their additional obligations. They all felt that any meetings or other obligations that would take them out of their own buildings needed to be calendared well in advance – months instead of weeks ahead of time. Some also felt that they could get senior administrators more involved in particular events if they had the dates far enough in advance.
 - *At the beginning of the Residency period the central administration should attempt to line up dates/times for Supervisor meetings every 6-8 weeks across the entire Residency period. (The supervisors felt comfortable figuring out their own agenda for some of these meetings, depending on then-current priorities.) Public presentations and other demonstrations or visits should also be placed on their calendars at the outset of the Residencies. The Supervisor consensus was that they would rather have dates reserved on their calendars that needed to later be dropped (this was preferable to trying to add a date to their calendar later on).*
- *Much of the lack of clarity was due to first-time start-up issues. But in the future, the central administration should set up a website with calendars, timetables, clear explanation of each deliverable, etc. And any changes to these should be marked in a different color and also emailed to both Residents and Supervisors along with a note as to why the changes were made.*

Lack of status

- Residents felt that they were constantly being treated as Interns by both central administrative staff, and by staff in other departments in their host institutions. They perceived a total lack of respect for them as a working professional, not acknowledging that they had completed a professional Masters Degree.
 - *Central administrative staff as well as Supervisors need to be more outspoken in repeating to their colleagues that these Residents were engaged to do professional work, and that they are nothing like “Interns”.*
 - *Unfortunately, most Memory Institutions only have two categories for the people who work there: Professionals or Interns. Not wanting these Residents to be perceived as low-level interns, this program took the title “Resident” from the medical field. Unfortunately, the term “Resident” did not have the desired effect. Perhaps at term from academia like “Fellow” might better convey that these are not Interns.*

Better communications

- Residents cited a number of incidents where they felt alienated or put down by the central administration. Residents and supervisors both cited incidents where they felt that the central administration failed to deliver on meeting a promise or goal. Over time, a series of incidents began to be seen as a pattern, and the Residents became highly critical and alienated from the central administration.
 - Each of these incidents had a relatively easy-to-understand explanation when a direct question was posed to one of the administrators during the Assessment process. Some involved different interpretations of the meaning of a particular word or phrase, and some involved previously unencountered higher-level LC administrative rules.
 - *Better methods need to be explored for more clearly communicating why certain shifts are being made. Rapid feedback methods should be set up so that when participants feel a disconnect from something voiced by the central administration, they can quickly interact to avoid misunderstandings.*
- Supervisors said that they often heard about changes in dates, deliverables, or requirements from their Resident rather than from LC.
- *Any announcements or changes to program dates, deliverables, or expectations should be communicated in person to the Residents (when possible), and should be repeated on listserves directed at both the Residents and at the Supervisors. These should also be posted on the NDSR website.*

In summary, improved administration would encompass: more resources, more clarity, better communications, dedicated NDSR hours, access to professionals knowledgeable in digital curation, I could also include more program transparency and ongoing reliable scheduling and documentation.

Though it was not specifically mentioned by the Supervisors or Residents, many of the administrative problems that arose were due to this being a new program with issues arising that were unanticipated beforehand. Now that a cohort has completed their Residencies, administrators can reflect upon and learn from issues that arose with that first cohort.

Program Expectations

The Supervisors felt that most program expectations were made clear from the beginning, but the Residents felt that expectations repeatedly changed throughout the duration of the program.

Application Process

Supervisors and Residents held significantly divergent views on the application process. Most Supervisors liked everything about the process; one called it “useful and orderly”, referring to the initial letters, the interview questions, and the video submission. The Supervisors felt that the process mirrored a normal job application process. Most felt that a less onerous application process would have led to a much larger pool of applications, and that the heft of the current process had the advantageous result of submissions only by very serious applicants. And some supervisors defended the rigorous application process on the basis that the Residents would serve as “ambassadors” both for the hosting organization, and for NDSR as a whole.

Residents, on the other hand, felt that the application process was far too onerous. They felt that three letters of recommendation were too many for someone likely still in a Masters program. They felt that a period of one month between when the Residency application process was announced and when the letters of recommendation were due was insufficient time to get someone to write a letter. They also felt that letters of recommendation penalized those in Distance Education MLIS programs who had little contact with instructors. And they wondered why they needed to submit both a declaration for Federal Employment (when a number of them were not applying for Residencies within Federal agencies) and an Undergraduate transcript (when a Graduate transcript should suffice).

Another key difference between the Supervisors and Residents was over videos that needed to be submitted as part of the application. Some Supervisors felt that the video submissions were the most revealing portions of the application, and said that in some ways they served a similar function to a resume’s cover letter. They felt that some of the videos revealed character traits (such as creativity) that were unlikely to show up elsewhere in the application process. And to some Supervisors, the video was an indication of technology savviness. But most Residents disliked the video requirement. They did not understand the purpose, and were stymied about what they were supposed to accomplish with the video. Both Supervisors and Residents had some concern about how the video requirement might marginalize some groups: introverted, those without access to/experience with cameras and editing, etc.

Suggestions to counter-act this included: guidance to hosting sites not to let the video over-influence them, clarity to applicants as to purpose of the video (encouraging creativity; showing off parts of you that don’t come through in the rest of your application), and/or allowing alternatives to video submission, such as a demo of a digital or analog project that the applicant had developed.

Additionally, Supervisors did express some concern about dealing with an increased number of applicants as the program grows. In this initial year, one Supervisor felt overwhelmed at having to look through 18 application packets. They suggested that

the central NDSR administration pre-screen applicants, and only forward about half a dozen to each hosting site.

Orientation/Training

The Supervisors felt that their orientation day in “how to be a good mentor” should have left much more time for interactions between the Supervisors. They felt that this was a missed opportunity at beginning to build a cohort among Supervisors. They felt that some of the lessons given on that day could have been readings that they would do later, freeing up time for them to get to know each other.

The Residents were upset that their “Boot Camp” curriculum was essentially a “train the trainer” curriculum instead of a “train an individual” curriculum. Another high-level complaint was that though important leaders in the field were brought in to instruct them, they had little time to interact with these instructors. They would have preferred reviewing slides in advance, having shorter instructional sessions, and then using the extra time to network with the instructors, particularly raising questions germane to projects (both those planned by the Residents, and previous projects undertaken by the instructors). They also thought that they would have been better able to contextualize the instructional sessions if they had been at their Residency for a week before starting instruction. And they regarded some of the sessions as being insultingly trivial (how to set up chairs, how to send out invitations) when they were craving hands-on sessions training them to use particular pieces of software.

Another widely-held Resident complaint was that the “Boot Camp” was trying to cover more issues than could be readily absorbed in a single week. They suggested breaking up this curriculum into two or three two-day sessions that could be spread out over a month or more. After the initial session, subsequent training could be combined with other activities, including different types of instructional sessions. Residents also expressed a desire for periodic instructional sessions throughout the Residency period, including some on particular software tools for digital preservation.

Instruction for Residents needs to move away from 20th century instructional formats (like lectures) into hybrid formats (like where “students” read slides on their own, and use face-time for more interactive goals like networking, discussions, sharing, etc.). And instruction needs to embrace more 21st century methods like: continuing education with periodic lessons throughout the Residency (learning skills through instruction after you’ve experienced issues on the job), hands-on peer instruction (skill-shares for learning tools like JHOVE, Archive-It, scripting languages, ...), etc.

The Residencies themselves

Supervisors felt that the biggest challenges of the Residencies did not involve technology at all. Many were organizational. “The biggest challenge was for the Resident to learn the organization and the people; we are a very complex organization.” Other Supervisors cited the problem of obtaining the right organizational placement for the Resident (both in terms of status and in terms of departmental affiliation). As mentioned elsewhere, the departmental affiliation of the Resident became crucial in terms of other staff granting them both respect and access, and proper placement was critical in breaking down departmental silos. In addition, quite a few Supervisors felt that it was critical that the Resident have close working relationships both with a content department and an IT department. More than one Resident, in retrospect, did not think that they were placed in the appropriate department.

Supervisors were also very concerned with their mentoring responsibilities. Some cited the difficulty of mentoring tasks that are very new, tasks and responsibilities that the Supervisor is not already well-versed in. Most felt that they had managed to handle the mentoring well, but that there may have been a mis-match between Resident expectations and Supervisor capabilities (see below). The most oft-cited pattern for the 9-month period was: an initial period of extensive mentoring, following by a transition to the Resident engaged in fairly independent work (with occasional consultation with the Supervisor). Most Supervisors felt that this was an appropriate natural flow moving forward, but some felt like they would have liked to have learned more alongside the Residents in the last half of the Residencies (particularly through further training sessions or webinars).

There was a clear mis-match between Resident expectations (that their Supervisor would be an expert in Digital Curation) and the Supervisors’ actual experience and background. The Supervisors felt that they negotiated this fairly well, but also felt the need for the Program to communicate to the Residents that their Supervisor might not necessarily be a Digital Curation expert (and that the Resident could still learn a lot from them). Many Residents felt that their host organization had too high expectations of Resident knowledge and abilities; Residents felt that they should be learning from the organization, rather than the organization learning from them.

Most of the Resident projects did not follow the proposal as originally submitted to NDSR during the application process. Some initial proposals were not well enough planned; sometimes there was a mis-match between the Site’s expectations and the Resident’s actual knowledge and experience; sometimes the project was scoped too large or too small; and sometimes the situation had changed between when the initial proposal was written and when the Resident arrived. (And as one Supervisor said, “Digital stewardship is a large learning process; one needs to go through it in order to learn how to balance challenge and expectations.”) Most sites used the original proposal as a reference, but worked with the Resident to significantly change it, often incorporating some of the Resident’s particular strengths.

Supervisors stressed the need to be nimble and flexible, redesigning the project and the workplan. And in some cases, the Resident took on a role similar to an outside consultant, reviewing and redesigning the project and workplan into something that could be completed in the allotted timeframe and with existing resources.

Several Supervisors cited the great value in having the Resident come from outside the organization and provide a fresh look at what they were doing, asking key questions that forced them to clarify why they had done something a particular way. In some cases the Resident confirmed what an outside consultant had already said, while in others they helped to redefine the landscape in newer ways. But an important value recognized by almost all the Supervisors was that the Resident was embedded in the organization for long enough to make appropriate decisions (that an outsider might not make). And most of the Supervisors also cited the critical value in having the Resident able to focus full-time attention on Digital Curation issues (something that no existing staff member could have time for).

Some Supervisors felt that they might be able to obtain internal organizational funds to send a Resident to professional development or training sessions. But they felt that they would need to closely tie this to a stated outcome. Others were more skeptical, and cited lead-time, government restrictions, and other organizational impediments to funding continuing education for Residents.

In the initial proposal, the Site needs to indicate whether they are expecting the Resident to be a solo person (acting like an independent consultant), or whether they want the Resident to be a regular team member. The initial proposal should also include a clause "and if time permits, the Resident will..." to identify some tasks that are not absolutely essential core elements. The original proposal and workplan need to be viewed as simply a sketch, and not a blueprint to follow. This needs to be re-thought once the Resident has been on site.

The NDSR program needs to make clear to Resident applicants that, in many cases, their Supervisor will not be a Digital Curation authority. But that, in all cases, their Supervisor will be an experienced professional who will likely know their own collection, know about planning, be familiar with professional practices, etc. And that the Resident will learn many generally applicable professional practices and attitudes from the Supervisor, as well as specific digital curation practices both from NDSR training, and by working on their major project. NDSR should also make clear that digital curation training really requires working on a major project.

Recommended changes to the Program Administration

Both Supervisors and Residents vocalized a voluminous set of comments that the Assessor has transformed into a list of suggestions for future NDSR iterations:

Administrative Start-Up

- *Consider changing the name from “Residents” to something more like “Fellows”.*
- *Make clear to Resident applicants that their Supervisor is not likely to be an authority in Digital Curation. But that they will learn a lot about general planning and management from their Supervisor, and that the specifics about Digital Curation may come from both NDSR sessions and from actually working on their particular project.*
- *Be very clear to the Residents (both orally and in a written document): how they will be paid (and how that might implicate their taxes); what happens if they want to leave early; dates and scoping for each deliverable; scheduling for events and training sessions, and what will be required of the Residents for the events.*
- *Revamp the training program. Make it shorter at the beginning, and have it continue on a regular basis. Make better use of time together, and expect the Residents to review slides and articles both before and after group sessions. Include training sessions with tools. Let the Residents take some responsibility in choosing topics and making arrangements.*
- *Make very clear to Sites that Residents cannot be managing Interns.*

Scheduling, Communications, Clarity, and Support

- *Increase central NDSR support. Have clerical support to handle program management, web-postings, logistics. Have content-level support so that someone can help choose appropriate sites, advise the Residents on problems, help plan additional instruction sessions, etc. This can be a combination of content advisors and regular NDSR staff. Consider the model put forward by the WGBH NDSR-like proposal to IMLS: assigning both a site Supervisor and a Digital Curation subject expert to each Resident.*
- *Supervisors need to know well in advance when they will need to be away from their organization. It would be best for the NDSR Administration to reserve meeting dates on Supervisor calendars six months in advance, and later just drop ones that are not needed. For any event or meeting that may require some preparation by a Supervisor (like training, tours, and capstone events), the supervisor needs a couple of months of advanced warning. For any event where the presence of higher-level administration is desired, six months advanced warning should be given.*
- *Goals, deadlines, and benchmarks for various Resident activities (main project, training and professional development, reports, conference travel, public events, the Capstone event) should be well articulated and fixed at the beginning, with very few changes as the Residency period progresses. (Participants need to know whether each of these is primarily PR for NDSR, learning or networking opportunities for Residents, or whether there are other goals.) All these should be posted to a website, and any changes posted should also be emailed to all the parties.*
- *Supervisors would like the central administration to facilitate meetings among all the Supervisors. They all vocalized that they would like to have more contact*

with each other. At minimum, the central administration should set up some kind of communication tool (like a listserve) for the Supervisors to discuss amongst themselves. Additionally, they could facilitate Supervisor get-togethers every 6-8 weeks.

- *Supervisors can do a better job of mentoring if they are given a much clearer idea of what the Residents should be getting out of the Residency experience.*
- *Expectations for Resident travel or other professional development activities need to be clearly laid out even before the Resident begins. Some Supervisors felt that they could submit conference proposals incorporating some of the Resident's project, but to meet conference deadlines, they would need to submit these even before the Resident arrives. Additionally, internal requests for professional development funds or conference travel sometimes have deadlines that pre-date the Resident's arrival. Clarity is needed about what the NDSR administration requires in travel and professional development vs. what it desires, as well as what the NDSR administration will fund.*
- *Because the Residents became absolutely integral to the operation of the organization, Supervisors felt they needed significant advance notice about any meetings, travel, or professional development activities that would take the Resident out of the office for even a few hours. They also felt that they needed a better idea of the total expected out-of-office time at the outset of the Residency so that they could better plan for shifting responsibilities.²*

Further Issues

Stakeholders held vastly different views on the issue of whether a Resident should be allowed to *leave the Residency without completing the full 9 months*. The Residents were unanimous in their feeling that, as long as a Resident worked out task completion with their own Supervisor, leaving early did not pose any kind of problem. (Much of this feeling appeared to stem from Residents' views that the Residency was training for a permanent job, and if a Resident was offered a permanent job prior to Residency completion, they should be able to take it.) The NDSR Administration was unanimous in opposing requests to leave the Residency early because the Residents had committed to a full 9 months, and they felt that attrition would damage the program. The Supervisors were mixed in their reaction to this, with some wanting to strictly enforce the 9-month completion, and about half of them wanting to make it something negotiated directly between the Supervisor and the Resident.

² This widespread sentiment among Supervisors needs to be discussed by NDSR planners. On the one hand, Residents shouldn't occupy key positions where they are so vital to daily operations that they need to be present 40 hours/week. On the other hand, Residents need to command respect from staff in a variety of different departments, and cannot be seen as merely part-time employees.

Future assessment would be eased if NDSR collected baseline data at the start of each cohort. NDSR should put together a list of the general areas it wants to assess (whether stakeholder expectations are met, learning objectives for Residents, changes at hosting sites, etc.), develop a list of sub-categories within each area, and then should work on developing methodologies for assessing each of these. If one knows ahead of time what one wants to assess, in most cases baseline data gathered at the start of the program can be compared to data gathered at the end of the program. This would be likely to yield a much better assessment.

As *New Cohorts* are developed in other cities, there needs to be coordination between the cohorts. Topics and content for instructional modules can be shared, and the same webinars might be offered in multiple locations. Other types of planning documents can be shared across the cohorts. And interaction between the different cohorts could also be encouraged.

Appendix A
Recommendations from 1st Supervisor cohort to subsequent Supervisor cohorts

- Be honest in your self-evaluation of your own organization; are you ready? Do you have the buy-in from your organization? Is your organization really ready?
- In writing your initial proposal, add an "If time permits" clause—particularly looking beyond the initial project
- Future hosts need to clearly understand what the program aims are
- Be careful where you situate the Resident within your organization. Do not place them where they will be too closely identified with a particular department that does not command respect from other departments. Ideally locate them in a department that has already built bridges with other departments. And make sure that they have good access to the IT department.
- All sides need to be aware that teamwork and a well thought out work environment are a goal
- As a host, you should be prepared for the unexpected: government shutdown, snow days. Be flexible.
- Allow for ownership and flexibility; things may not go the way you think they will

Appendix B

NDSR Supervisors Focus Group Discussion Questions

4/21/14

Application Process

Was it clear what you were getting into?

Did you find the number of reference letters, etc. in the application packets excessive?

The questions that they were supposed to ask the applicants

Did they all get their first choices?

Other comments on selection process

What do you think should have been done differently?

Administration of Program

Are they aware of the program goals and what is expected of them

What did they think of LC and mgmt.

Do they have the support they need from LC?

Would you have liked to take advantage of some training sessions yourselves?

Would you want to have more contact w/other mentors?

What do you think could be been done better the next time?

The Resident

Did the Resident have the prior training/experience that you expected?

Would you have been able to support further training for the Resident (w/leave time, funds for workshops, etc.)? If LC asked you to pitch in funds for conference travel/training, would that be a deal-breaker?

How do mentors feel about Residents leaving before 9 months?

Did you do much mentoring?

How do you navigate btwn viewing Resident as student (like intern) and as someone who is supposed to have expertise in digital preservation?

What kinds of professional issues were they exposed to other than technical (administrative, collaborative, project mgmt., etc. challenges)

The Work/Projects

How did the prior description compare to the actual experience? Was the project the right size? How to figure this out beforehand?

Was the primary project useful to your org? (GREAT!)

How do you intend to sustain the projects; was this just a temporary thing, or will it be sustainable?

Your organization

Do you feel like your organization was prepared to host a Resident?

Were there problems for the Resident navigating btwn depts.?

Were the Residents place in the right place/dept within your organization? What kinds of challenges would moving them around pose?

Did you have bureaucratic problems (with badges, desks, computer accounts, etc.)?

What kinds of things did you learn?

Overall Summary

Did the Residency Program deliver what it promised?

Would they host another NDSR?

What would you tell Host sites that might start next year (what do you wish you would have known)?

Appendix C

NDSR Residents Focus Group Discussion Questions

4/20/14

Application Process

Was it clear what you were getting into?

Did the application and notification happen at the right times of year? Did you hear back soon enough?

What do you think should have been done differently?

What would you tell Residents starting next year (what do you wish you would have known)?

Boot Camp

Did it cover the right material? What components might be added or eliminated?

How was the sequencing of the material?

Were these the right instructors?

Was it appropriate to have all this at the beginning, or should it be spread throughout the year?

Are there some subjects/modules that you initially thought that you didn't need, but later realized that you did?

What about the diversity of skillsets needed btwn different Residency functions (curating data vs. objects)

Did the Boot Camp increase your comfort with Technical skills?

Administration of Program

Support

Leadership

Communication & clarity—disjointed and lapses in communications

Intervention when needed

Arranging additional training/fora/workshops

Facilitating communications btwn the Residents (& will that continue as a kind of professional support network?)

Should IMLS have had more or less involvement?

Financial issues

Were ALA and IMLS conferences a good idea?

Travel issues

How many of the problems do you think are start-up (first year) problems?

The Sites

Supervision/Mentoring

Was there a big difference in supervision and mentoring btwn the different sites?

Are some of you envious of each other?

Did you get enough guidance and feedback? Might any of these structures/procedures help improve this?

Your fit w/i the organization. Did you engage much with others? Did you get experience with collaboration?

Did you learn much about how the organization as a whole operated?

Challenges you faced (knowledge, politics, bureaucratic, ...)

What do you think that the org learned from you? Will the work you did have lasting effect on the org? Transformational?

The Work/Projects

Did the work match what you expected?

Was your project about the right size?

Did you frequently need to renegotiate the work and deliverable?

Will the work you did just fall apart after you leave, or are there plans to sustain it?

Your preparation for future Careers

Do you feel prepared to be a digital curator or steward? What more do you need?

Do you think that your experience this year will help your future career? In what ways?

Overall Summary

Did the Residency Program deliver what it promised?

Did the Residency help you develop knowledge and experience in these important areas: Technical skills, Project Mgmt, Administrative skills, Collaborative skills?

Do you think that the program should be continued?

How could it be made better for future cohorts?

Do you feel like you're now prepared for jobs that you weren't prepared to take before?

Once you're out in a job, how do you think you'd feel about hosting a Resident?