Propose, Plan, Execute, and Deliver: Developing a National Forum and Digital Deliverables around Data Quality Evaluation

Grace Liu, Bobray Bordelon, Rashelle Nagar, Jordan Sarti, Uyen Nguyen
2023 Beyond the Numbers Conference
Propose: How the Idea is Developed?
Propose: The Initial Idea and a Failed Proposal

NLG-LIBRARIES-FY21

West Chester University

The Role of the Academic Libraries in Promoting the Quality and Integrity of Business and Finance Research Data: A Pilot Study

West Chester University (WCU) seeks the Research in Service to Practice Grant of $149,950 to support a 2-year pilot qualitative study to address the high priority gaps of academic libraries in understanding business and finance research data quality and integrity issues and investigate the role of academic libraries in promoting the business research data quality and integrity. The study will develop new service models, best practices, and collaborative approaches for academic libraries and librarians and build the capacity of academic libraries to serve as catalysts to the scholars and researchers community.
Propose:
The Second Attempt to Make the Change

West Chester University

Building Capacity of Academic Librarians in Understanding Quantitative Data, Data Quality Problems, and Evaluating Data Quality: A National Forum

Summary

West Chester University in collaboration with Stanford University, the University of Illinois at Urbana-Champaign, collaborative consultants Mr. Bobray Bordelon (Economics & Finance Librarian/Data Services Librarian at Princeton University) and Marydee Ojala (Editor-in-chief of Online Searcher, formerly with Research Library & Information Center at the BankAmerica Corp.), will request $149,992 funding to organize a national open forum (one prep session and six expert panel discussion Zoom conference sessions) on building the capacity of academic librarians in understanding quantitative data, data quality problems, and evaluating data quality. This project ties closely to the Laura Bush 21st Century Librarian Grant Goal 3 and Objective 3.3, especially for building library workforce skills and expertise in cultivating critical and creative thinking skills. The target group of this project is academic librarians including subject
Propose:  
Pre-to-full Proposal: Build a Stellar Team

- Ms. Grace Liu (Principal Investigator), West Chester University
- Ms. Rashelle Nagar (Co-PI), Stanford University
- Mr. Bobray Bordelon (Collaborative Consultant), Princeton University
- Ms. Marydee Ojala (Collaborative Consultant), Editor-in-chief of Online Searcher
- Dr. Jodi Schneider (Project Advisor), the University of Illinois at Urbana-Champaign
- Ms. Jordan Sarti (Graduate Assistant), the University of Illinois at Urbana-Champaign
- Ms. Uyen Nguyen (Graduate Assistant), the University of Illinois at Urbana-Champaign
# Plan: 1st Year Schedule of Completion

## Schedule of Completion

<table>
<thead>
<tr>
<th>Activity (Year 1: August 2022- July 2023)</th>
<th>Project Lead</th>
<th>Baseline Time Estimate (hrs.)</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase I Pre-Forum Planning</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Bi-weekly project meetings &amp; quarterly formal assessment</td>
<td>GL, JSch</td>
<td>60 24 24 24 8 18 18</td>
<td>Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul</td>
</tr>
<tr>
<td>2 Organize pre-forum informal focus group</td>
<td>BB, GL</td>
<td>12 10 2</td>
<td></td>
</tr>
<tr>
<td>3 Develop forum themes and panelist guidelines</td>
<td>GL, BB, MO</td>
<td>15 4 4 2 2</td>
<td></td>
</tr>
<tr>
<td>4 Identify 30+ expert panelists</td>
<td>BB, MO</td>
<td>8 30 10 4</td>
<td>Extended</td>
</tr>
<tr>
<td>5 Develop consent forms for recording, copyright, etc.</td>
<td>GL</td>
<td>12 2 2</td>
<td></td>
</tr>
<tr>
<td>6 Recruit 20+ expert panelists, request intro and slides</td>
<td>BB</td>
<td>5 40 5 10</td>
<td></td>
</tr>
<tr>
<td>7 Hire graduate student assistant</td>
<td>GL, JSch</td>
<td>20 6</td>
<td></td>
</tr>
<tr>
<td>8 Setup Zoom conferences, registration, and presenter prep</td>
<td>RN, JS</td>
<td>6 2 12 6</td>
<td></td>
</tr>
<tr>
<td>9 Advertise and promote the events</td>
<td>BB, RN, GL</td>
<td>8 12 3 8 4</td>
<td></td>
</tr>
<tr>
<td>10 Conduct literature review to complement expert opinions</td>
<td>GL</td>
<td>33 8</td>
<td></td>
</tr>
<tr>
<td>Phase II Execution</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 Host the national forms (7 sessions)</td>
<td>BB, GL</td>
<td>20 24 12 12 12 12</td>
<td></td>
</tr>
<tr>
<td>12 Conduct participant feedback survey and analysis</td>
<td>GL</td>
<td>12 2 2 2</td>
<td></td>
</tr>
<tr>
<td>13 Clean up and produce forum transcripts</td>
<td>MO, JS</td>
<td>5 5 32</td>
<td></td>
</tr>
<tr>
<td>14 Compile PPT, panelist intro, recordings, etc.</td>
<td>GL, JS</td>
<td>5 4</td>
<td></td>
</tr>
<tr>
<td>15 First-year project assessment</td>
<td>GL</td>
<td>10 2 2 4</td>
<td></td>
</tr>
</tbody>
</table>

**First Year Total**: 231 152 71 58 20 100 30
# Plan: 2nd Year Schedule of Completion

## Schedule of Completion

<table>
<thead>
<tr>
<th>Activity (Year 2: August 2023 - July 2024)</th>
<th>Project Lead</th>
<th>Baseline Time Estimate (hrs.)</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly project meetings &amp; quarterly formal assessment</td>
<td>GL, JSch</td>
<td>32 12 12 12 8 12</td>
<td>Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul</td>
</tr>
<tr>
<td>Edit transcripts for an adapted, edited collection</td>
<td>MO, GL</td>
<td>26 6 40 10</td>
<td></td>
</tr>
<tr>
<td>Create intro and prepare other book content</td>
<td>MO, GL</td>
<td>14 15</td>
<td></td>
</tr>
<tr>
<td>Confirm the manuscripts with panelists</td>
<td>MO, UN</td>
<td>5 5</td>
<td></td>
</tr>
<tr>
<td>Design book cover, format, register ISBN and publish</td>
<td>GL, MO</td>
<td>20 10</td>
<td></td>
</tr>
<tr>
<td>Develop synthesized data evaluation strategies</td>
<td>GL, BB, RN</td>
<td>30 12 2 6 8</td>
<td></td>
</tr>
<tr>
<td>Organize post-forum informal focus group</td>
<td>GL</td>
<td>18 2 2 2 4 2</td>
<td></td>
</tr>
<tr>
<td>Gather expert feedback, revise, finalize the strategies</td>
<td>GL, BB</td>
<td>16 10 2 2 5</td>
<td></td>
</tr>
<tr>
<td>Create infographic guides</td>
<td>GL</td>
<td>28 2 2 2</td>
<td></td>
</tr>
<tr>
<td>Build project website</td>
<td>GL, UN</td>
<td>20 2 2 2</td>
<td></td>
</tr>
<tr>
<td>Disseminate project deliverables</td>
<td>GL, BB, MO</td>
<td>15 5 5 2 6</td>
<td></td>
</tr>
<tr>
<td>Evaluate project outcome and submit IMLS report</td>
<td>GL, JSch</td>
<td>16 2 2 2 4</td>
<td></td>
</tr>
</tbody>
</table>

| 2nd Year Total | 235 53 99 32 20 70 |
| Two-year Summary | 466 205 170 90 40 100 100 |

Personnel: Yan (Grace) Liu (GL, Project Director); Bobray Bordelon (BB, Collaborative Consultant); Marydee Ojala (MO, Collaborative Consultant); Rashelle Nagar (RN, Project Member); Jodi Schneider (JSch, Project Advisor); Jordan Sarti (JS, Graduate Assistant); Uyen Nguyen (UN, Graduate Assistant)
Plan:
Seven Webinar Sessions

1. Evaluating Data Quality: Challenges and Competencies
2. Quality Assurance in Data Creation
3. Understanding and Evaluating Governmental Data (U.S. and International)
4. Commercial Data Quality Issues
5. Data Quality: Reproducibility and Preservation
6. Data Quality: Evolving Employer Expectations
7. Librarians’ Role in Cultivating Data-Literate Citizens
Plan: Event Workflow

**WORKFLOW & TIMELINE**

IMLS National Forum Webinar Series

**EVENT DAY**
- Setup virtual background
- Drive slides (RN)
- Monitor Q&A (JS)
- Moderate session (SB)

**40D BEFORE**
- Send topic & questions to speaker (BB)

**25D BEFORE**
- Zoom registration link received (RN)

**20D BEFORE**
- Bitly links & promotion message ready (RN)
- Speaker consent & bio received; website updated (UN)

**17-15D BEFORE**
- Event promotion (All)

**7D BEFORE**
- Notify panelists about Zoom link and event time; Request slides (BB); # of registrants update (RN)

**3D BEFORE**
- Cue sheet & presentation slide ready (RN)

**1-2D AFTER**
- Attendee list received (RN);
- Feedback survey sent (GL)

**5-7D AFTER**
- Video recording & auto transcription received (RN)
- Video/Audio uploaded to Vimeo & website (UN); Speaker update (BB)

**15D AFTER**
- Transcription cleaned up (JS)
- Video CC Updated;
- Transcriptions uploaded to the website (UN)

**20D AFTER**
- Session summary & evaluation completed (GL)
Plan:
Event Promotion

- ALA Connect (ALA, ACRL, RUSA, RUSA-BRASS, IRRT, Core)
- ALA Affiliates
- State Library Associations
- ALA-accredited Library Schools
- Data Librarian List
- Academic Librarian List
- Special Library Association/IFLA
- Other Listservs: JESSE; BUSLIB-L; CODE4LIB
- Past Registrants

<table>
<thead>
<tr>
<th></th>
<th>Session 1</th>
<th>Session 2</th>
<th>Session 3</th>
<th>Session 4</th>
<th>Session 5</th>
<th>Session 6</th>
<th>Session 7</th>
<th>Total</th>
<th>Unique</th>
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</thead>
<tbody>
<tr>
<td># of Registration</td>
<td>1615</td>
<td>995</td>
<td>967</td>
<td>526</td>
<td>582</td>
<td>712</td>
<td>771</td>
<td>6168</td>
<td>3348</td>
</tr>
<tr>
<td># of Total Users</td>
<td>992</td>
<td>517</td>
<td>518</td>
<td>296</td>
<td>297</td>
<td>363</td>
<td>407</td>
<td>3390</td>
<td>1931</td>
</tr>
</tbody>
</table>
Execute: Speaker Recruitment

Speaker Pool

- Recruited - 25
- Alternates not contacted - 23
- No Response - 3
- Recommended someone else - 2
**Execute:** Speaker Recruitment
Execute: Speaker Recruitment
Execute: Speaker Recruitment

- Be open to suggestions from others
- Reach out to those you know
- Find a complimentary mix in terms of sectors, viewpoints
- Do not assume No because seemingly out of scope
- Do not assume yes
- Be persistent and follow up
**Execute:** Moderating Webinar Sessions

For the Event:
- Do not try to do too much if moderating
- Have someone else handle technology
- Have someone else organize Q&A and remove technical & previously answered questions
- Let the audience know what to expect & NOT to expect (hands-on)

**Q&A:**
- Often the most interesting & practical part
- Moderator needs to know the subject area to be able to combine and prioritize
- Leave sufficient time
Execute: Branding

- Logo
- Website design elements
- Slide deck
- Zoom background
Execute: Technology

- Help from GSB Events & Operations Team
- Zoom Webinar
- Link tracking

Understanding & Evaluating
Governmental Data (U.S. & International)
with
James Church, Bill Sermons, and Jill Blaemers

March 30, 2023
Execute: Logistics

- Panelists
- Slides
- Cue Sheet
- Q&A Tracking document
Execute: Takeaways

● Plan, plan, plan
● But be flexible
● Accurately assess technology needs
**Execute:** Transcription & Webinar Q&A

- Cleaning up Zoom transcriptions
- Managing webinar Q&A behind the scenes
- Some takeaways
Deliver:
Build Project Website and Event Sessions

- Speakers confirmed
- Request materials (send reminder)
- Update website
- Speakers approval

Session Speakers

Kira Lillard
Technical Services Librarian,
Federal Reserve Bank of Kansas City

Kira Lillard is a librarian in the Research Division at the Federal Reserve Bank of Kansas City where she is responsible for researchers’ code and data releases, website administration, and is a member of the Data Governance Committee. She holds a BA from The Colorado College, an MA in Asian Studies from the University of Hawaii, and an MLS from Emporia State University. Her research interests include web usability, research access, replicability, and universal design.

Lars Vilhuber
Executive Director, Labor Dynamics Institute, Cornell University School of Industrial and Labor Relations (ILR)

Lars Vilhuber holds a Ph.D. in Economics from Université de Montréal, Canada, and is currently on the faculty of the Cornell University Economics Department. He has interests in labor economics, statistical disclosure limitation and data dissemination, and reproducibility and replicability in the social sciences. He is the Data Editor of the American Economic Association, and Managing Editor of the Journal of Privacy and Confidentiality.

Kathleen Weldon
Director of Data Operations and Communications, Roper Center for Public Opinion Research, Cornell University

Kathleen has managed data collection and management efforts for the non-profit Roper Center for Public Opinion Research since 2016. During that time, she has led the implementation of a new acquisition policy based on a combination of methodological and transparency criteria, enactment of a Transparency Project for all data providers, and development of a bifurcated collection based on methodological evaluations, as well as an enhanced presentation of methodological information to aid in the evaluation of historical data files. Most recently, she has directed the development of inclusion policies for building Roper Center-curated trends of polling questions.
Deliver:
Prepare the Deliverables

- Google Sites:
  - Easier to use
  - Collaboration between team members
  - Sharing with others
  - Limited customizing capabilities
  - Google domain and back-up storage
Assess:
Project Statistics

- 3,348 Total unique registrants
- 1,931 Total unique attendees
- Registrants from 55 countries
- Over 1,000 different organizations
- Diverse sections with academic focus
- 10,000+ Website page views
Questions & Answers

Visit our project website at:
https://sites.google.com/view/imls2022-data-quality