Zachary A. Valdes

Phone: (936) 294-2512 ● Email: zach.valdes@shsu.edu

Curriculum Vitae

Education

MS, **Library & Information Science** (2011)
University of North Texas

- Information Organization

BA, **Mass Communication** - **Journalism** (2007)
Sam Houston State University, Huntsville

- Major: Journalism
- Minor: Sociology

Employment History

- **E-Resources Metadata Management Librarian (Assistant Professor)**
  Newton Gresham Library
  Sam Houston State University, Huntsville, TX 77340
  (January 2015- current)
  Contact: Ann Holder, (936) 294-1630

- **Special Formats Cataloger (Assistant Professor)**
  Newton Gresham Library
  Sam Houston State University, Huntsville, TX 77340
  (September 2012- January 2015)
  Contact: Ann Holder, (936) 294-1630

- **Publications Coordinator**, Office of the Registrar
  Sam Houston State University, Huntsville, TX 77340
  (September 2007- September 2012)
  Contact: Teresa Ringo, (936) 294-1061

- **Student Assistant, Cataloging**
  Newton Gresham Library
  Sam Houston State University, Huntsville, TX 77340
  (May 2006- August 2007)
  Contact: Tanya Cook, (936) 294-3679

- **Summer Journalist Intern**,
  Madisonville Meteor Newspaper, Madisonville, TX
  (May 2006 - August 2006)
  Contact: (936) 348-3505

Professional Organizations

- **OCLC, Americas Regional Council (ARC)**
- **American Library Association**

Experience   **E-Resources Metadata Management Librarian (Assistant Professor)**
Sam Houston State University – Newton Gresham Library

- Maintain electronic resource and print continuing resource metadata in ILS and EDS. Develop, coordinate, and complete departmental projects to correct metadata errors and improve accessibility of all electronic resources (e.g., e-journals, e-books, streaming media, online databases, etc.), through batch-editing, scripting, and other automated means using regular expressions, VBA, MarcEdit, and ILS custom report functions.
- Manage discovery system and A-Z database. Oversee print and e-journal title and holding synchronization for more than 300 subscription packages, and more than 500,000 e-journals from 107 vendors. Manage annual project to confirm holding date ranges are accurate and that new additions, updates, and deletions are reconciled across all of the library's discovery interfaces. Resolve patron e-resource accessibility error reports submitted via Springshare's LibAnswer ticketing system, and collaborate with Head of Acquisitions to investigate licensing/access discrepancies.
- Oversee metadata control for all NGL electronic resources and print continuing resources, including more than 500,000 e-journals, 800,000 e-books, 15,000 online videos, 4,000 XML/Dublin Core datasets, and 300 integrating resource online databases from more than 150 unique vendors. Manage e-book licensing and streaming media licensing in collaboration with library director and Electronic Resources Librarian. Conduct pre-order searching for e-book sale and streaming media purchase requests, create order records in ILS and tracking records in electronic resource management system, create and co-manage ILS fund and vendor codes, receive and load items, and collaborate with invoicing staff. Provide guidance and functional supervision of staff involved with e-book and streaming media purchasing. Supervise one part-time Technical Services staff member.
- Work collaboratively with Head of Acquisitions and Acquisition staff on electronic resource budget accounting, reporting and planning.
- Develop procedures and workflows for cataloging of electronic resources, including e-journals, e-books, databases, streaming media, and integrating websites.
- Ensure timely synchronization of major transient e-book collections (e.g., EBSCO Academic Collection subscription, EBL PDA) with the library's catalog and discovery systems.
- Identify, evaluate, and stay current with emerging trends, practices and standards in metadata management, cataloging, electronic resource management, discovery, and user behavior. Explore emerging issues related to the role of the online catalog and other discovery services and platforms.
- Develop and maintain productive relationships with key library departments, particularly Acquisitions, Cataloging, Reference & Instruction, Circulation, Government Documents, and ILL. Collaborate with key departments to complete wide-ranging projects relating to electronic resource availability and accessibility.
- Work with Technical Services librarians and the library's Electronic Resources Team on database maintenance projects.
- Recommend, document, and participate in the implementation of processes, policies, and procedures related to electronic resource metadata and electronic resources management in collaboration with other librarians and support staff.
- Participate in the library's collection management/liaison program and assume collection development responsibilities for the department of Mass

Communication. Review and select titles for purchase, generate monthly budget/purchase reports, identify materials for reference area, make decisions regarding purchase or deletion of titles already held in other formats, conduct meetings with faculty liaison for Mass Communication department to discuss library's resources, needs, items of interest, budget updates, ordering schedule, and purchase proposals.

- Participate in weekend reference rotation. Assist with filling in during workdays when needed.
- Collaborate with Technical Services librarians to evaluate the potential use of new and emerging cataloging services, standards, and technologies (e.g., BIBFRAME, Schemas.org, Linked Data, XML, etc.).
- As one of three SirsiDynix API certified database administrators for NGL, perform database maintenance tasks and run specialized ad-hoc reports for library faculty and staff.

Special Formats Cataloger (Assistant Professor)
Sam Houston State University – Newton Gresham Library

- Manage cataloging and database maintenance tasks (i.e., new additions, retrospective enhancement, deletions) for all electronic special format resources, including more than 800,000 e-books, 15,000 online videos, 4,000 XML/Dublin Core datasets, and 300 integrating resource online databases from more than 150 unique vendors. Ensure optimal processing turnaround times for MARC and XML record cataloging via utilization of efficient batch processing techniques, including use of: regular expressions, tasks constructions, and data extractions. Perform original cataloging for electronic special formats when needed. Enhance records from AACR2 to RDA when needed. Synchronize e-book records with OCLC to ensure holdings accurately reflect what is held in the library's catalog. Conduct large scale retrospective MARC record maintenance projects as needed.
- Work with Acquisitions to enhance pre-order selection procedures. Assist with bibliographic verification and duplicate searching. Assist with generating and formatting budget reports.
- Supervise monthly bibliographic notification project. Train, advise, and assist a staff of one full-time librarian cataloger, and four full-time paraprofessional catalogers on best practices pertaining to this project. Devise methods to enhance efficiency while upholding latest cataloging standards. Develop procedures and enhance processing software programs accordingly.
- Manage and maintain records for all highly transient e-book subscription and patron driven acquisition collections (e.g., EBSCO Academic Collection, Ebrary PDA, EBL, Safari subscription, etc.).
- Bibliographer for Mass Communication department – Review and select titles for purchase, generate monthly budget/purchase reports, identify materials to duplicate in reference area, make decisions regarding purchase or deletion of titles already held in other formats, conduct meetings with faculty liaison for Mass Communication department to discuss library's resources, needs, items of interest, budget updates, ordering schedule, and purchase proposals.
- Reference – Perform reference librarian duties on a periodic basis, including providing research instruction, answering student inquiries regarding catalog and database navigation, facilitating essential reference resources, and providing technical device and printer support.

Publications Coordinator, Office of the Registrar
Sam Houston State University

- Supervise university staff and departments during key university publication projects; manage high-priority objectives to help facilitate dissemination of pertinent registration information to a rapidly growing student, faculty, and staff population.

- Develop, coordinate, and oversee publishing for all Sam Houston State University Office of the Registrar website content, including electronic resources and print publications.

- Perform updates for all Office of the Registrar webpages; consult with staff members to acquire information needed for website improvements; oversee creation and implementation of new webpages as needed; manage development of online PDF forms and documents; verify ADA compliance for online documents.

- Oversee and update pertinent university resources such as the Academic Calendar (http://www.shsu.edu/~reg_www/academic_calendar/) and the Academics subsection to the SHSU Events calendar (http://www.shsu.edu/events/index.html).

- Oversee publication of the university Commencement Program (largest SHSU semesterly publication).Management and supervisory responsibilities include establishing deadlines for departments, collaborating with various departments and the University Press to ensure timely progress on all objectives, communicating roles and objectives to each department, maintaining progress status for each department, evaluating department/staff performance, and generating performance overview reports with recommendations for improvement.

- Other management tasks include management of data accumulation utilizing self-designed database to track e-mail inquiry volume and topics for all e-mails submitted to the Office of the Registrar; communicating projected information needs to staff, and monitoring inquiry trends to help anticipate and respond to student information needs.

Student Assistant, Cataloging - Newton Gresham Library, SHSU

- Responsibilities included physical processing of books and other library materials (i.e. affixing call number labels, date due slips, magnetic security strips, etc.), cataloging books for the Browsing and New Book collections, and using specialized library software to make changes to bibliographic, volume, and copy records.

- Responsible for identifying call number errors during final processing of books and other library materials and to bring those errors to the attention of the cataloger.

- Cataloging books for the Browsing and New Book collections included creating short bibliographic records in the library's database, determining title, author, publication information and genre, and entering that information into the catalog record.

- Worked with catalogers on a wide range of special projects. Projects involved specialized cataloging knowledge and often included making changes to bibliographic, volume, and copy records. Projects also often required comparing items on the shelf to the bibliographic record to determine that the item is correctly cataloged.

- Responsibilities required attention to detail and ability to use sound judgment to successfully complete assigned projects.

Summer Journalist Intern, Madisonville Meteor Newspaper
- Developed and edited articles, designed publication format, maintained electronic resources, organized layout templates, and performed on-the-scene reporting.

Special Projects

- **Continuing Resources Access Checking**
  Developed procedures to systematically check university continuing resources for access issues. Project involves supervising work of 1 part-time staff member, coordinating timing of resource checking, and collaborating with Head of Technical Services, Electronic Resources Librarian, and Head of Acquisitions to ensure access checking is being performed in a manner that best fulfills the needs of the institution. This project helps enable the library to review accessibility of all purchased and subscribed e-journal packages (317) each calendar year, reconciles package additions and deletions, and better positions the library to reduce problem resolution turnaround times when accessibility errors are reported.

- **PDA Duplication Identification and Processing**
  Developed an automated process using VBA programming to check triggered/loaned PDA titles against the library's catalog listings of owned materials in real time. Process involves overseeing work of one full time staff member, and coordinating with this position to ensure titles identified as duplicates are removed from all of the library's search interfaces in an expedient manner. Between the project's implementation date of September 15, 2016, and the end of the calendar year, 304 titles were identified as duplicates and removed from the system.

- **JSTOR Print Periodical Withdraw Project**
  Project required methods to efficiently match the library's JSTOR print periodical holdings against what the library has access to electronically. Matched titles were to be organized by subject area and distributed to corresponding bibliographers for review. Processes involved in this project include the following:
  - Formulation: Wrote VBA script to match descriptive metadata from separate lists (Sirsi, EDS, and JSTOR) based on any given title's current or preceding designated ISSN (with some ISSN lineages spanning more than ten generations). Developed a call number conversion schema and grading formula which uses scoring logic to assign numerical value to any given call number. Wrote VBA script to integrate this schema into the automation of assigning all titles to appropriate subject area and/or bibliographer, formatting, and separating all listed titles into subject-specific workbooks.
  - Processing: Oversee processing of all bibliographer selections. Collaborated with Head of Technical Services to develop initial workflow. Finalized processing workflow, mapped out workflow chart, and oversee execution of all processing steps. Coordinate with five library departments to ensure resources are pulled from the shelves, discarded, and updated across all of the library's systems (Sirsi, OCLC, Publication Finder/EDS).

- **Print Periodicals Representation Project**
  Developed method to synchronize library print periodical holdings with EBSCO's Publication Finder tool. Process involved using VBA to identify duplicate titles, organize holding ranges, format/standardize metadata for unique and duplicated

title loads, and upload content into EDS platform. Developed procedures to address problem resolution for failed title loads. This project resulted in all of the library's print periodicals and their corresponding date/holding ranges being represented in Publication Finder alongside all related electronic access points.

- **Concurrent User Access Note Project**
  Enhanced records for NGL's electronic resources to display a concurrent user access limit note for each associated link. This project required pulling all applicable records from Sirsi, identifying access levels for each link, arranging record links hierarchically based on greatest concurrent access level to least, and reloading updated records into Sirsi using database overlay reports. In addition to pushing the link with the greatest level of access to the catalog's search result screen (the link most likely to be clicked by the patron), this project also offers the added benefit of pushing the concurrent access limit statements into the library's EDS search interface, thereby ensuring students, faculty, and staff, are able to easily identify access limits of any given electronic resource regardless of which search interface is being used.

- **Reference Area Statistics**
  Collaborated with Head of Reference to develop system for generating usage statistics report of print reference items using item barcodes as a matching point.

- **SHSU-Library: Bibliographic Notification Project**
  Enhanced procedures originally developed in 2012 and data processing functions for cataloging staff. Bibliographic notification processing ensures records in the catalog and EDS remain current, accurate, and synchronized with OCLC. The procedures I originally developed in 2012 effectively enhanced efficiency of the monthly bibliographic notification project and improved catalog quality by automating approximately 85% of the project. The new procedures expand on this foundation to incorporate Worldshare Metadata Collection Manager (WMCM) to further simplify data retrieval. Created Z:\ drive locations for storing files, and update folders with bibliographic notification metadata on a monthly basis via FTP server downloads, thereby enhancing overall staff processing time by an additional 10-15% Additionally, also enhanced originally developed 2012 task-specific regular expression scripts and MarcEdit programs to be used in conjunction with the newly revised procedures, resulting in further timesaving enhancement by effectively condensing a 3-15 day project down from a 15 minute task after first developed procedures, to an approximately 10-minute task under the new revisions

- **SHSU- Library: Serials Bibliographic Notification Project**

  Developed procedures and processing functions to improve efficiency of serials bibliographic notifications processing for the Serials Cataloger. Bibliographic notifications ensure records in the catalog and EDS remain current, accurate, and synchronized with OCLC. Based on my analysis of statistics received from the WMCM system, many signs pointed towards a strong possibility of a substantial increase in the number of serial bibliographic notification records requiring processing. As such, I developed procedures to preemptively address this possible increase by modifying sections of the standard bibliographic notification procedures and adding additional steps where necessary to curtail the instructions to the specific needs of the Serials Cataloger. Although slightly more complex than the standard bibliographic notifications procedures, the serials bibliographic notification processing procedures have effectively enhanced workflow efficiency and transitioned the project from a volume

dependent task to a volume independent task. As a result, the procedures have ensured large fluctuations in records received from month to month can be easily managed by a single cataloger in a timely and efficient manner.

- **SHSU- Library: Vendor Tagging Project**
  Performed retrospective 899 local field conversion for all electronic special format MARC records in order to efficiently correlate and track information pertaining to each resource's: collection, vendor, access method, access point(s), added date, and conditional purchase date. All records for e-books, data files, and electronic videos now conform to the library's newly developed 899 field policies. Identified more than 28,000 e-books which existed in the catalog without 899 fields, but which are now accounted for and in compliance. In all, 150 new 899 titles were generated during this project and more than 210,000 records were brought into compliance with the new policy standards.

- **SHSU- Library: Acquisitions E-Book Processing Procedures** Developed e-book processing procedures to enhance tracking between Acquisitions and Cataloging during the processing of firm order purchased e- books and to improve interoperating processing efficiency between the two units. Soon after the hiring of new Acquisitions staff, it became apparent that new staff were having difficulty identifying the intricacies of workflow variances and processing requirements among differing collections and, as a result, were making errors when creating order records and importing metadata from OCLC. Additionally, because many of the processing requirements have only recently become necessary in conjunction with the addition of large subscription-based collections to the catalog (e.g., EBSCO Academic Collection, Ebrary PDA, etc.,), there was no guiding documentation available for the Acquisitions staff to clarify said requirements. Hence, these procedures were created to fill this void and present a clear workflow that could outline the optimal processing path of any firm order purchased e-book. Since implementing the new procedures, record import and overlay errors have dropped substantially, resulting in vast improvement to e-book firm order processing efficiency, catalog accuracy, and order/processing turnaround times.

- **SHSU- Library: Subject Bibliography and Collection Development**
  Developed monthly report for the benefit of the Mass Communication liaison and standing Mass Communication faculty as a means to enhance communication to the department on information pertaining to the NGL's MCM budget and items purchased under the current fiscal year. Reports include starting account balances, monthly purchase analyses with individual title costs, total resources purchased, average cost per title, and lists of notable titles recommended to the department for purchase consideration.

- **SHSU- Library: PDA / ILS Synchronization**
  Collaborated with Electronic Resource Librarian and Head of Access Services to maintain optimum scheduling for batch loading PDA collection records while minimizing potential for negative collateral effects on the ILS.

- **SHSU- Library:** Streamlined e-book firm order cataloging workflow for the Newton Gresham Library via writing scripts to address vendor-specific metadata requirements; improved average processing time by more than 300 percent.

- **SHSU-Library**: Developed task-specific regular expression scripts and MarcEdit programs to be used in conjunction with various processing procedures, resulting in a statistically significant timesaving enhancement for multiple projects.

- **SHSU Registrar:** Proposed and developed Office of the Registrar E-mail Statistics Report to measure inquiry volume, analyze trends in student e-mail inquiry subjects, and help identify added service opportunities to achieve enhanced communication between the Office of the Registrar and Sam Houston State University students, faculty, and staff.

- **SHSU Registrar:** Developed Access database to track e-mail inquiries by various criteria. Utilized database to generate E-mail Statistics Reports, measure effectiveness of new communication projects, and enhance department communication efforts. Reports derived from this database are now generated monthly and utilized by Office of the Registrar staff administrators, the University Registrar, and the Vice President of Enrollment Management at SHSU.

Community

- Contributor to OCLC's Americas Regional Council (ARC) in the capacity of Alternate Delegate. Participate in discussions of the future of OCLC, assist with formulating council bylaws, and stand ready to fill in for elected delegates should they be unable to attend conference meetings.

- One of four librarians selected from national pool to serve as collaborator and advisor to Amigos Library Services E-book Cataloging Working Group in development of its proprietary e-book lending platform, Amigos eShelf. Responsibilities include advising on best practices for: MARC record construction, RDA implementation, organization of linked data, and electronic resource maintenance.

- Volunteer for the H.E.A.R.T.S Veterans Museum library development project (http://www.heartsmuseum.com/) (January 2011 – current.) Responsibilities include assisting in various aspects with a museum library development project, including original cataloging of monographs, weeding, data entry, database maintenance, authority control maintenance, physical processing, and item shelving. Work has involved collaborating and working as a team with four NGL librarians and two NGL staff members.

- Volunteer Cataloger for the Newton Gresham Library. (January 2011 – September 2012). Responsibilities include original cataloging and record development for both print and electronic resources utilizing OCLC Connexion Client and Browser, adhering to RDA standards. Other duties include uploading original records into OCLC, batch processing, enhancing records in Sirsi, performing subject analysis for dissertations, enhancing master bibliographic records, and updating/setting holdings. Work involves use of LCSH, LCCN, OCLC, and RDA.
  Chairman to Library Development Committee for Elpis Ministries International. (June 2010 – February 2013). Responsibilities include developing and overseeing plan to build a ground-up library for African orphans in Iganga, Uganda.

- University of North Texas Student Tutor (January 2010 – December 2011). Responsibilities included providing tutor services to graduate level UNT LIS students, covering cataloging standards and emerging information organization trends.

Publications

        Peer Reviewed

a. Martinez, M. M., Cassidy, E., Mueller, K. L., Shen, L., Thompson, M., & Valdes, Z. (2016). Collecting Sex Materials for Libraries. *Behavioral & Social Sciences Librarian, 35*(4), 151-170. doi:10.1080/01639269.2017.1283181

b. Jones, G. F., Cassidy, E. D., Mcmain, L., Strickland, S. D., Thompson, M., & Valdes, Z. (2015). Are Serials Worth Their Weight in Knowledge? A Value Study. *Library Leadership & Management, 29*(4), 578-582. doi:10.1016/j.acalib.2015.07.004

c. Mueller, K., Thompson, M., & Valdes, Z; (2014). Ready, Set,Hire! Perceptions of new technical services librarian preparedness. *The Journal of Academic Librarianship, 41*(5), 1-33. https://journals.tdl.org/llm/index.php/llm/index.

        Non Peer-Reviewed

d. Valdes, Z. (2015). Mapping the Nation: History and Cartography in Nineteenth-Century America Susan Schulten. Chicago: University of Chicago Press, 2012. *The Journal of American Culture, 38*(2), 173-174. doi:10.1111/jacc.12349 – 771 words

e. Valdes, Z. (2015). Flannery O'Connor: Writing a Theology of Disabled Humanity Timothy J. Basselin. Waco, TX: Baylor University Press, 2013. *The Journal of American Culture, 38(2)*, 166-167. doi:10.1111/jacc.12320 – 778 words

f. Valdes, Z. (2014). Online Shopping. *The Social History of the American Family: An Encyclopedia,* 974-976. doi:10.4135/9781452286143.n396

g. Valdes, Z. (2014). YouTube. *The Social History of the American Family: An Encyclopedia,* 1475-1476. doi:10.4135/9781452286143.n583

h. Valdes, Z. (2014). EBay. *The Social History of the American Family: An Encyclopedia,* 400-402. doi:10.4135/9781452286143.n17

Presentations

a. Valdes, Z; Mueller, K. (2014, October). *PDA, DDA, UDA --- OMG!* Technology- based instruction guide presented at the annual TLA District 8 Fall Conference, Pasadena, TX.

b. Martinez, M. (2014). Microcosm of the Apocalypse (or Post-) in Videogames. Co-authored by Zachary Valdes. Popular Culture Association, Chicago, IL.

c. Valdes, Z. (2013). *Enhancing efficiency with MarcEdit: How one institution utilizes MarcEdit and Regular Expressions to enhance processing and avoid the tedious.* Presented at the annual COSUGI National Conference, Salt Lake City, UT. Presentation published in COSUGI Presentations Archives website and available as perpetual resource.

Software	Dreamweaver, Illustrator, InDesign, MarcEdit, OCLC Connexion Client, Photoshop, SirsiDynix, Photoshop, MS Office API and (Visio/Access/Excel/PowerPoint/Project/Word).
	API, Web, and Object Oriented Programing: Certified in SirsiDynix API. Knowledgeable of VBA, JavaScript, Perl, HTML, CSS, Dublic Core, and SQL.