

EXECUTIVE CORE QUALIFICATIONS

ECQ #1 - Leading Change

The National Archives holds over 10 billion pieces of paper and millions of photographs, film, maps, and artifacts maintained in 44 facilities across the country. Our mission is to preserve these materials, which are the permanent records of the federal government, and make them as widely available as possible to the public. In the past, providing access to the records meant making the records available in research rooms at our facilities. In the 1990s, we developed a website and in the early 2000s, we began a program to create a centralized online catalog. This allowed researchers to discover information about our records online. About 750,000 researchers visited this online catalog each year.

I had a vision for a radically expanded interaction with the American public by using new tools to provide much greater access to our records. In 2009, I successfully lobbied to become the Archives' representative to the White House Open Government Working Group. There we discussed ways to make our agencies more transparent, participatory and collaborative. These goals were a natural fit with NARA's mission to provide access to our records. My vision was to take access further, from our catalog and website out to where the public was online – to social media websites and mobile phone applications. I saw that access was just an initial step and that using new tools for better communication, with each other and the public, would be transformative for the agency.

As NARA's first Chief Digital Access Strategist, I envisioned and led innovative projects that launched the agency into a new era of social networking and effective use of new media. Prior to my appointment, a working group of high-level staff, some not familiar with social media, had unsuccessfully attempted to develop consensus and make headway on social media projects. A great deal of skepticism reigned in the agency regarding the value of even participating in social media. My challenge was to overcome this resistance. My first action was to abolish this group.

I reconfigured a new team, the Social Media Working Group (SMWG), consisting of enthusiastic, social media savvy staff from across the agency who represented the diversity of viewpoints needed to make any federal social media project successful. I included information technology (IT) security specialists, records managers, communication specialists, general counsel, archivists, project managers and policy staff as well as my staff. I opened membership to interested staff who wanted to launch a specific project. I required members to be responsible and available to help others advance their projects. In this way, I ignited a grassroots interest in using social media across the agency.

I also aligned the vision of the Online Public Access Integrated Product Team (OPA IPT), of which I was chair, to the launching of social media pilot projects that promoted online access to our records. The OPA IPT consisted of senior staff from across the agency and their endorsement of social media pilots gave legitimacy to social media efforts. By initiating projects in the OPA IPT, I was able to familiarize senior executives with social media tools, and help them understand the positive impact those tools could make on providing access to our records. I found the key to getting senior executives on board was to ensure that our initial efforts were

“pilots” and that the pilot projects could be pulled at the first sign of trouble. Once these pilot projects started showing success, I turned them over to the SMWG to expand into sustainable efforts for offices from across the agency to use.

I spoke to staff across the agency about using social media tools to achieve the open government goals of transparency, participation, and collaboration. I worked with my social media leads to create streamlined processes for reviewing project proposals and developing new projects. I met personally with staff members from across the agency who were interested in trying a new project, but were concerned about the hoops they would have to go through to start. I advertised our staff as a one-stop shop for social media projects and promised we would do the work of clearing projects with IT security, acquisitions, the general council, records management, policy and others. I drew on the relationships built in the SMWG to accomplish these efficiencies.

A watershed moment for the acceptance of social media at the National Archives happened in 2010, when I recommended the use of a social media voting tool, Ideascale, to obtain feedback from our staff across the country about our budget. The budget staff members were interested but hesitant to use the tool, unsure of how it would be received across the agency. I directed my staff to work closely with the budget staff to design the questions and to ensure a successful launch. From a staff of less than 3,500, the Budget Brainstorm received 22,000 votes on various budget ideas, and another 371 comments. Staff members were eager to participate and senior managers were impressed with how easy and efficient it was to use social media to glean information from staff. The prevalent attitude toward social media at that point began to turn from disregard as a frivolous distraction to a new appreciation for the tools as useful and efficient for communication.

I continued to explain my vision for transparency, participation and collaboration using new media tools with agency executives and provided guidance on how to use these tools to gather staff input for a major agency transformation initiative that resulted in moving the agency in a new direction and entirely restructured the agency around our customers. At the beginning of 2009, the National Archives had an RSS feed as our only social media project. Today we have over 135 projects on 13 platforms, including Tumblr, History Pin, Flickr, Facebook, Foursquare, Twitter, YouTube, and Wikipedia. Our Flickr project alone has received more than two million views. Our Today's Document mobile application has had over 60,000 downloads. We have over 100,000 digital copies of our records available in Wikipedia. These images have received over 750 million visits in just the past year. In January 2011, we hosted our Wikipedia meet-up. Over 1,000 staff members currently participate in internal or external social media platforms.

Due to my vision and successful implementation, I have been asked to speak at a variety of conferences including the annual meeting of the Society of American Archivists, the annual meeting of the International Council of Archives, Penn State University's annual social media conference, the 2012 Wikimedia World Conference, and an international conference at the National Archives of Bulgaria. Other agencies and institutions have also contacted me to find out more about our successful initiatives and to ask advice. I have provided interviews to media such as Gov2.0 radio, and was featured in an article as a rising executive in Government Executive magazine. Because of my vision and leadership, the National Archives has greatly expanded access to our records and the culture of the agency has been transformed.

ECQ #2 - Leading People

I currently direct a total of 80 staff, ranging from GS-4 students to GS-15 managers. The staff includes archives specialists, project managers, digitization specialists, program analysts, and IT specialists. Throughout my career, I have excelled at building highly-motivated, diverse, and productive teams.

My first management position involved directing a staff of 11 archives specialists responsible for editing and publishing descriptive records, and maintaining our online catalog. We were in the middle of a multi-year project, working with employees from around the agency, to complete the content of the catalog, and several of my staff members were showing signs of burn out. I read an article about Google's practice of requiring staff to use 20% of their time for their own projects. I applied that concept, on a voluntary basis, for my staff, to give them a break from some of the more repetitive aspects of their work and to inspire new creativity. One person took the opportunity immediately to work on archiving jazz recordings he was personally interested in. Staff noticed his morale change within weeks and his productivity actually increased over time. Others took on smaller projects and expressed their surprise that I would be willing to allow them to pursue projects that were of interest to them. This has been one of my most successful tools for maintaining morale, increasing productivity, and providing training opportunities for staff. I also established cross-training efforts within my office, so no one person was solely responsible for a particular task. This gave everyone some breathing room, and eliminated bottlenecks in our processes.

I instituted regular all-staff meetings. I worked at making these fun as well as informative. We have such a range of ages, expertise, and backgrounds on our staff that I focused on highlighting each staffer's particular strengths. For example, often our younger staffers are more comfortable with new media tools, while many of our older staff are experts in archival theory. By noticing and verbally supporting their strengths, I helped staff to see those strengths in each other. I urged staff to learn from each other at every opportunity. Eventually, I tasked staff with running the meetings. Their investments in the meetings resulted in consistent communications and higher morale.

Although my team had communicated regularly with staff from across the agency on a one-on-one basis, there was little sense of community among the thirty staff from across the agency who regularly submitted descriptions for our catalog. I tasked my team with developing a conference for these staff to meet with us to discuss processes, policies, and best practices. We had panel discussions, presentations, and even games, such as rounds of Jeopardy that dealt with our standards, as well as free time for discussions. We have held three conferences over the past six years. The result has been a decrease in the number of descriptions requiring edits by my staff before going online: a reduction from 70% of descriptions that needed editing when I started as supervisor, to less than 20% today. We increased quality and have met our annual strategic goals for completing the catalog.

When the agency contracted with a consultant to teach staff in other offices the principles of being a high performance organization, I negotiated with senior management to procure a portion of the consultant's time to work with my staff on team building and leadership efforts.

In 2009, I also became responsible for the web program and the eight staff who ran it. For years, I had heard complaints that archives.gov, the agency's web page, was too cluttered to be useful. Once staff and colleagues outside of the agency learned of my responsibility for the web, their complaints of a cluttered website grew. It had been five years since the website had been comprehensively updated, during which time the homepage grew link by link, narrative by narrative, until it simply had too much information. I declared 2010, the Year of the Web, and began to plan the redesign.

I met with the web manager and her staff to get their perspectives on the website and what changes needed to take place. The manager was resistant to redesigning the site beyond small updates. She noted that the same senior managers who complained that the home page was cluttered insisted on adding links to their particular programs and projects. I listened and let the web manager know that I understood how uncomfortable she was with dramatically changing the site. I promised her that as we worked on a redesign, I would buffer her and her staff from executives attempting to add clutter and I did. I also assured her that I respected her expertise, acknowledging her years of experience, while also encouraging her to entertain new ideas from her staff and contractors. Her staff members were eager for the opportunity to revamp the site. I supported their enthusiasm and encouraged them to think about radical redesign, with our online users in mind. Under my direction, the team produced a radically redesigned website that won the 2011 Clearmark Award for usability. Today the manager is proud of this accomplishment.

I encouraged the manager to continue meeting with staff to discuss additional ideas they may have. I expanded this to all other supervisors under my direction, so now all staff members are involved in regular meetings with their peers and supervisor. I meet with all supervisors and managers weekly as well. I established a monthly potluck party that has become increasingly popular. In 2010, I became Acting Director of the Digitization Division, and began the same process of meetings with staff and supervisors. From these meetings, I learned that some staff had outdated and/or inaccurate position descriptions and had not received annual performance evaluations. I continue to work with my subordinate supervisors to ensure that all staff have up-to-date positions descriptions and have established processes to make certain all staff receive feedback on their performance and annual ratings.

I tangibly and intangibly rewarded employees who met their goals and held those who did not accountable by requiring and monitoring plans for getting on track. I dealt successfully with conduct problems such as tardiness and helped several employees with work-life balance issues. I also identified the training needs of employees, sending several to project management classes, web development, leadership, and communication classes. I regularly notified staff of any training opportunities they may be interested in. I scheduled brown bag lunches for trainees to share the knowledge they acquired at their classes, so the entire staff had opportunities to learn.

Because of my leadership, a burned out staff that was stuck in the usual routine became a highly-productive, happy, and motivated workforce committed to each other and to delivering successfully on its goals. My office has become regarded as one of the best places in the agency to work for those who want a high-energy, challenging, innovative and inclusive environment in which to contribute to the agency's mission.

ECQ #3 - Results Driven

NARA's mission is to preserve and make available the permanent records of the federal government. For the past six years, I have led one of NARA's highest priority mission-related projects, the Archival Research Catalog (ARC). This multi-year, \$8 million information technology project was developed to provide customers with online access to our archival holdings.

The ARC system and program had been active for several years when I was appointed manager. By that time, the agency finally had achieved a shared descriptive standard, and had begun populating the ARC system. My charge was to meet the agency's strategic goals to increase the percentage of records described in ARC each year and to maintain and update the system.

I assumed the most challenging part of this effort would be the development and maintenance of the technology. The technology component turned out to be the less difficult challenge, because I used the skills learned through my project management training and experience as a Contracting Officer's Technical Representative on previous projects. I led a technically sophisticated staff and we worked well together as a team with our contractors.

User adoption issues drove much of the work that lay before me. Staff across the agency had been resistant to the ARC project from the start. Archival staff saw the catalog as an ill-considered mandate forced on them by out of touch executives. Most archivists were not invested in the success of the project. Several were openly hostile to it. We had less than 35% of our records described in the catalog when I took over leadership. I knew that if we didn't improve staff buy in, the project could easily die in its infancy.

I attacked this problem by hosting multiple targeted group meetings to obtain feedback from description archivists. I personally invited the most hostile staff so that they understood I intended to listen to their complaints and work with them. I guided my project manager and staff to analyze the feedback we gleaned from these sessions and to develop requirements for system improvements. I led a full redesign of the system, using a three-phased iterative approach. I met regularly with staff and contractors to ensure that we stayed within the budget, scope, and time constraints for the project. I met with description staff to effectively prioritize improvements to the system that would be most useful to them. In doing this, I developed trust with description staff and moved the cultural dynamic on this project from an "us verses them" mentality, to a real sense of teamwork in building the catalog together as an agency. Some of our most vocal critics are now our most ardent supporters due to my leadership on this effort.

I provided monthly spot awards to description archivists around the agency who wrote high-quality and large numbers of descriptions. I tasked my staff to work one-on-one with archivists who were struggling with learning the new system. I held biannual seminars for archivists to receive advanced or refresher training and to talk with their colleagues about the description processes. After talking with the description archivists about their frustrations with the ARC system, it became evident that my staff's processes also needed improvement. Our work processes were rife with bottlenecks and backlogs. When I started out on the project, it took my

staff 58 days to provide review comments to archivists on their descriptions. I analyzed our processes, and conducted a small business process reengineering effort. I directed staff to implement automated processes that improved the speed and quality of the review. I encouraged my staff to treat description archivists as our customers and to be creative in finding ways to minimize their frustrations and maximize their success. All of these efforts resulted in shortening the turnaround for review from 58 days to five days or less. Continual innovation allowed my staff to maintain this turnaround time for the past six years with no additional resources, even as submissions have increased more than ten-fold.

The training manual that had been originally developed for using the ARC system was a six-inch binder and was actually used as a doorstop in one office. I surveyed staff on the usefulness of the manual and used their feedback to whittle it down to a usable one-page "How to Get Started" guide and a five-page "ARC Survival Guide." Training classes originally lasted a full 40-hour week, with staff flying to our offices from around the country to attend. I streamlined these to a six-hour course taught over three days via webinar, saving the agency over \$40,000 per year in travel costs alone.

In 2007, I attended classes for my project management master's certificate at the George Washington University (GWU). I coordinated with our Human Resources and Acquisitions offices to bring in an excellent project management professor from GWU to provide a project management class for my entire staff. This helped focus all of my staff, from students to archivists to team leads, on basic project management concepts that allowed us all to improve on product and service delivery. Subsequently, other offices in our agency also requested project management training for their staffs and I was able to help them coordinate the effort. This spawned the development of a project management program that is in place at the agency today.

Because of my results-driven approach, the ARC system and program flourished. When I began leading this project, my staff reviewed and published hundreds of descriptions online each month. We now publish tens of thousands each month. Under my leadership, over 400 staff members from across the agency have been trained. Because of the improvements I implemented to our training and review processes, the number of descriptions requiring editing prior to publication dropped from 70% when I started on the project, to less than 20% today. In 2006, we had a total of 63,000 descriptions available in ARC. Today we have 6.4 million descriptions. In 2006, only 35% of our records were described in the catalog. Today we have 80% of records described in the catalog. Under my leadership the agency has consistently met our strategic goal of providing increased online access to our records, with over a million annual searches and favorable user satisfaction scores.

ECQ #4 - Business Acumen

As Chief Digital Access Strategist for NARA, I administer an annual budget of five million dollars, and am responsible for determining the ongoing programming, staffing and individual projects for the Innovation Office. I am responsible for the web and social media program, which includes our intranet, internet, and social media projects; the online catalog program, which includes development and maintenance of the catalog technologies, and the description and review programs; the data standards program; and the digitization program, which includes internal digitization projects as well as partnerships with external partners. I chair two major working groups that include staff from offices across the agency: the Online Public Access Integrated Product Team and the Open Government Working Group. These groups include staff from our policy, records management, and archival program offices as well as our general counsel. I currently manage 80 staff, ranging from GS-4 students to GS-15 managers. The staff includes archives specialists, project managers, digitization specialists, program analysts, and IT specialists. I base staffing and budget decisions on our plans to fulfill the agency's strategic goals of preserving and providing access to the permanent records of the federal government.

One of my first steps upon becoming responsible for the web program was to meet with the staff to identify opportunities to increase efficiencies as well as build morale. The web staff told me that they spend most of their time coding each web page that is requested by staff from across the agency. This tedious manual coding could be averted if we had a content management system (CMS). The CMS would provide simple pre-coded templates that agency staff could use with minimal guidance from our office.

I designed a budget strategy for the web that includes streamlining current content coding by integrating an open-source content management system, Drupal, for our intranet and internet sites. As a result of selecting open-source software, we will have access to literally thousands of Drupal modules to customize our CMS without paying exorbitant costs for proprietary software. I have implemented this solution for our internal website and will include our public web pages by the end of 2012. The changes have already resulted in saving one FTE (full time employee equivalent) and I expect to be able to further reduce the coding staff from six to four by the end of the year. I plan to repurpose those positions to work on research, statistical analysis, and mobile application projects. The new CMS will provide more granular statistics regarding our web pages, which will lead to better management of the website as a whole. Staff morale has already increased knowing that their work will be expanding from manual coding to include more challenging opportunities.

An example of my abilities to streamline processes, save money, and do more with less is evident in the process I used to establish and develop NARA's first social media staff. When I became the Chief Digital Access Strategist, I was charged with developing a new social media staff, with few resources outside of the current web and online catalog staff already in place. I accomplished this by allocating an FTE from the existing staff and hiring a cadre of students for our initial staffing. The use of students has proven to be an exceptionally efficient way to gain instant expertise on our staff for new media projects, and to bring on board a great deal of energy and enthusiasm. Subsequently, upon completion of their formal education, I have hired several of the students into full time permanent positions. I also provide details for staff from other offices

not only as a way to augment my staff, but to also train others who take their knowledge back to their offices across the agency. By resourcing the social media staff this way, I have led a cost-effective and efficient way to build our staff and develop social media projects across the agency. The result is that we moved from one social media project at the beginning of 2009, an RSS feed on our webpage, to our current total of 135 social media projects on over 13 platforms.

I hold regular meetings with subordinate managers and supervisors to review and discuss our annual spend plan. I leverage these meetings to discuss good project management practices, and to discuss and analyze project risks and opportunities. In this way, supervisors learn from and critique each other's projects and the meetings offer a cross-training opportunity that strengthens each member of the team. I have also led my staff to be conscious of continually improving our processes. For example, I tasked staff with streamlining and updating our description training course, which was a 40 hour course taught at our facility in Maryland. Staff members from across the country were required to fly in for the week. We replaced this training with three two-hour webinar sessions that staff could take in their own offices. To do this, I provided my staff with training on how to effectively run webinars. I also directed them to plan support for staff who may need additional personalized attention as we moved from traditional training to online training. It was a big change and a great deal of work for my staff. The webinars have been universally praised by attendees, rating 5.5 out of 6 on student satisfaction scores. The savings to the agency is over \$40,000 per year in travel costs alone.

I worked closely with acquisitions staff, general counsel and our Information Services staff for successful major IT procurements, including the selection of contractors for our Description and Authority Services and our Internal Collaboration Network (ICN). I have overseen the scope, schedule, and costs of these projects through regular meetings with my project managers and contractors, as well as periodic demonstrations throughout the development processes. I have worked closely with our Chief Financial Officer, Chief Information Officer, Chief Operating Officer, and Union officials to deal with funding issues, data architecture issues, user adoption issues, and union concerns. The result is that the ICN, NARA's first tool for online internal communication among all staff, has experienced a successful beta period and is poised for full launch in November 2012. The Description and Authority Services system is in its third of three phases of development, within scope and budget, and is set to launch in the Spring of 2013.

ECQ #5 - Building Coalitions

Virtually every major effort I have led at the National Archives has required a coalition to successfully accomplish the work. The successes we have realized over the past two years in social media have involved a partnership with staff in policy, records management, general counsel, communications, information technology (IT) security, capital planning, and program offices. The mission and needs of the staff in these disparate offices often ran counter to moving projects forward. However, after thoroughly discussing their concerns, I have been able to find ways to both meet their needs and move projects forward as well. The issues they raise are often vital to the success of the project.

An example of how I built a coalition for the success of a project is illustrated by the Online Public Access (OPA) project. As chair of the Online Public Access Integrated Product Team (OPA IPT), I led a team from across the agency to envision the future of online access to our holdings. I pulled together archivists, policy and IT specialists, and senior executives from diverse offices across the agency. I spent the first two months of meetings establishing trust, building consensus, and laying out the goals for the group. This was an essential first step, because when anyone strayed too far into their own vision for access, I circled back to our overall goals to get us back on track. Fundamental to all of our goals was the concept of putting our online researcher first. I continuously harkened back to the "researcher first" concept to gain consensus and make real changes to how we provided access to the records and their metadata online. This was not easy, since several people at the table, including me, were representing successful legacy systems, which would be replaced by our new online public access system. My willingness to take a new look at how we provide information online led the way for others to do the same.

After talking one on one with every member of the team, I pulled together mock-ups of online access pages and search functionality. This helped the team to envision the future and discuss specific changes that would be necessary to achieve the vision and ensure their concerns were addressed. The mock-ups crystallized our concepts and helped us to keep the goal of putting the researchers' needs first. After each meeting, I updated the mock-ups to keep them in alignment with the decisions made at the meetings. I provided the final versions of these mock-ups along with our requirements to the contractors who built our system. Team members also used the mock-ups to talk with staff in their offices and bring them on board.

The result is that we successfully launched the prototype to the public in December 2010. We received positive comments from researchers all over the web, such as:

- It isn't simply the breadth of the collection that makes this a great tool; it's the presentation of the information. The digital copy of the item is large and central, and all the pertinent catalog information is also easy to read.
"Search & Display Over 10 Million Historical Government Records, Thanks to the National Archives," ReadWriteWeb
- Searching the new OPA site is dead-simple. Put your search criteria, and hit GO... Based upon my initial searches at the OPA site, I know that I'll be using it a lot.
"The New NARA Online Public Search Site is Powerful!" GenealogyBlog

I have also built alliances with staff from other agencies on the White House Open Government Working Group. I played a key role in persuading senior managers from other agencies who oversee data.gov to allow digitized copies of records into their system (previously they had required electronic records). I represented NARA's needs at working group meetings, but what really made the difference was when I worked with NARA staff to host a tour of our exhibits for the working group. On that tour, I talked with managers of data.gov and personally showed them the kinds of documents that we could make available if they allowed our digitized copies into data.gov. Seeing the treasures we hold at the National Archives and hearing the stories related to the documents convinced them that digital copies needed to be accessible through data.gov. NARA will be able to provide over 60 million digital copies to data.gov over the next several years thanks to this effort.