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## **Tool Review** ETDplus Toolkit

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## *Review of the ETDplus Toolkit*

**Educopia Institute. (2018). ETDplus Toolkit. Retrieved from <https://educopia.org/etd-toolkit/>.**

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Electronic theses and dissertations (ETDs) have traditionally taken the form of PDFs, and ETD programs and their submission and curation procedures have been built around this format. However, graduate students are increasingly creating non-PDF files during their research, and in some cases these files are just as or more important than the PDFs that must be submitted to satisfy degree requirements (Skinner, 2017). As a result, both graduate students and ETD administrators need resources to support the development, curation, management, and preservation of a wide variety of complex digital objects. In response to this need, the Educopia Institute developed the ETDplus Toolkit, a collection of openly licensed materials designed to be used as teaching tools by librarians and other instructors. The toolkit consists of six modules covering the topics of copyright<sup>1</sup>, data organization, file formats, metadata, storage, and version control. The materials are available through a Google Drive folder that is linked from Educopia's ETDplus Toolkit page (<https://educopia.org/etd-toolkit/>). Each module includes learning objectives, a guidance brief, a hand-out, slides, and pre- and post-workshop surveys. The materials are released under a CC-BY license, allowing for editing and reuse (Creative Commons, n.d.).

The toolkit materials are designed for delivery via workshops, but the open licenses enable users to customize or repackage the content to fit other delivery methods or to target different audiences. Although the intended audience is graduate students, the content could be suitable for a wide range of learners, including faculty and advanced undergraduates. Moreover, each module is self-contained, allowing for the materials to be used in support of standalone sessions. Here I can speak from experience, having led a one-shot workshop using the Data Organization Module. The workshop was attended by masters and doctoral students from a variety of departments with no prior exposure to the toolkit materials, and the feedback I received indicated that the content was well-suited for this audience.

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<sup>1</sup> The copyright module is specifically focused on United States Copyright, and therefore may be of limited use to non-U.S.-based audiences.



While the content and structure of the materials is well suited for newcomers, it is beneficial for instructors to have some prior familiarity with the subject matter. I hesitate to call myself an expert in these areas, but I have benefitted from prior training through library school coursework and professional development opportunities. By no means is prior experience a prerequisite for using the toolkit, but it is helpful for answering questions and adapting materials to match local services.

To support instructors, the toolkit includes an “administrator’s guide,” which provides an overview of the materials and a couple of exercises. While this information is not without value, the label “administrator’s guide” is somewhat misleading, as it consists of a slide deck designed to guide a workshop in a conference-type setting. Rather than bringing potential instructors up to speed on the topics covered in the toolkit, the guide serves to provide background and motivation for the ETDplus project. The exercises ask attendees to answer the following questions on sticky notes, and discuss afterwards:

- What content types does your institution’s ETD program currently accept?
- What content types does your institution’s digital preservation program currently support?

Though the administrator’s guide does not serve as a training module for instructors, it does do a nice job articulating the need to educate graduate students in the toolkit’s topic areas, and it raises important issues that could serve as starting points for evaluating an ETD program’s capacity to support student scholars and curate the diverse types of research outputs that they produce. Those who wish to learn more about the content of the toolkit are likely to benefit more from recordings of virtual workshops led by Katherine Skinner, which are made available through YouTube (Educopia Institute, 2017).

Experience levels aside, one of the main challenges of using the toolkit is determining the best way to reach potential audiences. In many cases, an ETD office’s interaction with graduate students is limited to the end of their programs as they deposit their materials. In order for the toolkit to truly benefit students, institutions need to identify earlier points at which the modules can be integrated into graduate education. While library or graduate college-sponsored workshops may give students the *opportunity* to receive training earlier in their programs, students are more likely to attend sessions that are in some manner integrated with their home departments or colleges. It may be worthwhile to partner with subject librarians whose knowledge of their departments could include engagement opportunities, such as first-year seminars or a speaker series. Some liaisons may be interested in teaching sessions themselves, and others can facilitate connections between departments and ETD staff. Another possibility is packaging sessions in a multi-day “bootcamp” program, a model that is used by the Cornell University Library’s Doctoral Students Immersion

Program (Eldermire et al., 2019). This program is offered during the winter intersession when graduate students often have more availability and fewer demands than during fall and spring semesters.

Considering the challenges of getting students to attend workshops, it may be tempting to combine topics into fewer sessions to increase the value for attendees when they do show up. While there are probably effective ways of doing this, it should be done with care. In the past, I led a 1-hour session for graduate students touching on issues from the data organization, file formats, storage, and version control modules. Because there is overlap between these topics, I was concerned that a session devoted to only one of them would cover too little. However, workshop attendees reported that the session actually covered too much and that they would have preferred a session that was less informationally dense.

Suffice to say, there is a multitude of ways to make use of the ETDplus Toolkit and determining the most effective uses at a given institution will require some trial and error. But if my experience is any indication, it is best to start by using the materials as given and wait to try out customizations and remixes until some experience using the modules has been acquired. The toolkit's value goes well beyond supporting the traditional ETD programs, offering a path to support graduate students throughout their education, not only at the point of submitting their theses. This type of engagement, in turn, is likely to lead to other outreach and education opportunities in which the toolkit can continue to be put to use.

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**BIOGRAPHY**

Ian Harmon is the Scholarly Communications Librarian at West Virginia University where he provides support for digital publishing, data management, author rights, and open scholarship.