**Transforming Catalogers (and Others) into Digital Library Specialists: The Evolution of the University of Oregon's Metadata and Digital Library Services**

**Presentation for OCLC WiLS Peer Council Spring Meeting, May 18, 2005**
**by**
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**Title Slide 1**

Thank you for coming. I'd like to thank WiLS OCLC for inviting me to speak and especially Debbie Cardinal for her work in making the arrangements.

**Title Slide 2**

I'm going to talk for a  bit and then I hope we'll have a discussion. I encourage you to ask questions as we go along, as well, if you'd like me to clarify something.

I started at the University of Oregon as Head of the Catalog Dept. in February 2000

**Slide 1**

February 2000

- Traditional Catalog Dept (20 people):

    o responsible for MARC/AACR2 cataloging, using LCSH, LCC
    o database maintenance in III's ILS and related table work
    o member of PCC: NACO, SACO, CONSER Enhance
    o retrospective conversion being done only for items that circulated

**Slide 2**

May 2005

- Metadata and Digital Library Services (30 people):

  o responsible for all of above, plus

**Slide 3**

  o creating and maintaining digital library collections, including preservation and public presentation
    - Scanning of images, text, etc. (OCR)
    - Descriptive and technical metadata
    - Running the software (CONTENTdm)
    - designing web sites and search interfaces
    - PR and instruction about collections
  o running the campus institutional repository, including marketing and setting policies, software admin (DSpace) and upgrades, public pages
  o digital and photographic reproductions of library materials
  o exhibit services (assist faculty with projects, presentations, posters, etc.)
  o microfilming (newspapers, theses, on demand reproductions)
  o preservation and conservation of print materials
  o traditional photography and darkroom work for library and campus publicity and publications

How did we get from there to here? It didn't just happen – we asked for it and worked towards it

**Slide 4**

- 5 years ago the context:

  o Great staff – would have been a lot more difficult with a different group
    - well-trained, stable, long-term staff: professional and paraprofessional
    - intelligent, hard-working, dedicated
    - excellent interim leadership (Lori Robare)
  o PCC – NACO, SACO, CONSER Enhance

- o Already doing quick cataloging in our Acquisitions department
- o cleanest database I've ever seen thanks to Catalog Management and Enrichment Team (CMET)
- o team-based (formats, languages)
- o Library – ARL library without staff or resources to be that
  - ▪ $800,000 budget deficit

- My credentials (or why my catalogers trusted me)
  - o CC:DA
  - o CCS Exec
  - o PCC involvement from beginning (More, Better, Faster, Cheaper)
  - o 20+ years in cataloging – my mantras
    - o Cataloging must change
    - o Cataloging is a public service
    - o Timeliness is an essential component of quality (Brian Schottlaender referring to Sara Thomas' work starting the PCC)

- 6 months into my tenure, new interim, then permanent, leadership of the library (Deb Carver)

  - o former AUL for Public Services (during my interview asked me if I didn't think the Catalog Dept. had too many people)
  - o energetic, ambitious (mountain climber – Mount Hood)
  - o started initiative process
    - ▪ identify important issues and projects for library to pursue
    - ▪ didn't want to maintain status quo
  - o valued collaboration, risk taking
  - o **no whining**

- Increasingly bad budget situation; frozen positions; lost positions
  - o Forced us to be creative thinkers and move beyond the status quo if we wanted to do new, innovative things

**Slide 5**

Gradual evolution

- Expansion and redefinition of traditional services – in stages; evolving vision; desire to get more done more quickly without loss of quality – improved efficiencies

**Bullets on slide**

- Expanded PCC (BIBCO, full CONSER)
- Retrospective conversion (10-year hiatus – 200,000 items)
    - No additional staff or funding
- Access to Collections Initiative
    - cross-departmental (access services, branch library, university archives, etc.)
    - define access more broadly:
        - different levels (cataloger's judgment, full, minimal, collection, item)
        - different types (MARC, EAD, DC)
        - different providers (catalogers, documents, special collections, etc.)
    - Uncataloged collections survey (never cataloged)
        - 500,000 items needing item-level access
        - priority ranking undertaken (with CDA involvement)
            - library-wide effort, not just responsibility of catalogers
        - now working off collections – each one is a project
            - (projects are us – and effect on teams)
            - Teams are more like overlapping circles; much less proprietary; willing to tackle just about anything
            - Daphne and local area documents
- Manuscript cataloging
    - Worked with Special Collections for a year
- Map cataloging
    - Worked with the Map Librarian – map cataloging workshop, Acq. And Cataloging staff
- Started introducing new services and approaches - chronology
    - Different levels of cataloging – not everything required fullest level (discussions dating from March 2000)

- EAD training for department head (April 2000) and several catalogers following year
- **Preservation Department merged with Catalog Dept Feb. 2001 (became Materials Processing and Conservation Unit - MPCU)**
  - **didn't go looking for this one – increased FTE to 30**
  - **vision statement – looking for common ground**
- Non-library collections in library catalog (started May 2001)
- digital collections work started in March 2003
- Name change in December 2003 – reflecting new role
- Image Services Center (ISC) joined us in July 2004
  - FTE stable at 30 – lost positions in cataloging, reclassified some existing staff as they took on higher-level work and took over some of the cataloging duties of lost positions

**Slide 6**

- Acquire new skills (myself and the department)
  - No longer have the same comfort level with our knowledge and expertise that we used to have – I'm starting over after 20 years
  - Dublin Core, XML, TGM, etc.
  - Working on uncataloged collections – project orientation
    - lot of cross training between teams and units
    - breaking down traditional divisions of labor within the department
  - Initiatives – cross departmental and cross divisional

**Slide 7**

- Access to Collections

**Slide 8 and 9**

- Data for Local Communities (LSTA grant)
  - The University of Oregon Libraries Document Center was the recipient of a two-year LSTA grant 2002-2004 to provide comprehensive access to Oregon local area data. The aim of the project was to serve the information needs of local government, community planners, researchers,

and others needing free, ready access to local area data, by collecting in one location the best sources of current data on Oregon and its sub-state areas. The project has a [searchable database](#) that is created from specially-coded bibliographic records in the Summit catalog.

## Slide 10 and 11

- o Northwest Digital Archive (grant-funded EAD project)
    - ▪ 3 staff members participating in it

## Slide 12 and 13

- o Digital Library Initiative, member (8/00-9/02)
    - ▪ Access to digital collections drafted by me

## Slide 14, 15, and 16

- o Metadata Implementation Group, chair (10/02 – ongoing)
    - ▪ **Moorhouse collection, grant, the Catalog Dept. staff stepped in- March 2003 – turning point**
        - • Voluntary participation of department staff

## Slide 17 and 18

- o **Institutional Repository Group – co-chair (1/03 – ongoing)**
    - ▪ **Expanded focus on scholarly communication**
    - ▪ **Brought dept out of the back room and into direct contact with faculty**
        - • **another turning point in redefinition of department**

## Slide 19 and 20

- o Digital Content Coordinators, chair (7/04)
    - ▪ Revamped group following my and Corey's attendance at Digital Preservation workshop held at Cornell in summer of 2004
    - ▪ Working on becoming a trusted digital repository

**Slide 21**

In our work on digital collections, we are responsible for scanning, metadata (technical and descriptive), running and updating the software, developing routines and procedures, developing and maintaining the public interfaces to the collections.

**Slide 22**

- Staff training

    o New staff, new skill set
        ▪ Hired two new librarians with experience working with both MARC and non-MARC metadata and systems
        ▪ Hiring these people made the transition easier and faster
    o Introduction to Dublin Core (training exercise on photographs)
    o Introduction to content analysis of images (Sara Shatford Layne)
    o Revised approach to descriptive metadata
        ▪ This isn't MARC and it isn't AACR2
    o We keep one step ahead of our staff; never enough time


- Our professional development informed department's evolution
    o PCC/SCT – continuing education (Jean Hirons/SCCTP; Ana Cristan) (99-02)
    o Bibliographic Control in the New Millennium (Nov. 2000)
    o Continuing Education Task Force (2002-2003)
    o Various readings and meetings attended
    o Corey's work with DCMI, Nathan's work with AV and archives community

**Slide 23**

Digital collections standards; as we develop them, we try to document them. Not nearly as routine or well documented as we would like.

**Slide 24**

A lot of thought has gone into our approach to subject analysis of digital collections that is very specific to the way the software works, as well as our attempt to take users' needs and approaches into account.

**Slide 25 through 28**

Look at technical and descriptive metadata

**Slide 29 through 46 (ends at Scholars' Bank)**

I'm now going to talk about our current workflow. As I do, I'll scroll through some images from our digital collections just to give you something interesting to look at.

Current workflow

- No single workflow – each new project requires new workflow, with some common principles:
    o librarians do original MARC cataloging, answer questions from staff, train staff, and do project development and management
    o OAs do work in MPCU and ISC (as above) and project management
    o LT3 catalogers do original and high-level copy cataloging of new acquisitions, uncataloged backlogs, and retrospective conversion (monographs, serials, e-resources, all formats)
        ▪ Some LT3 cataloging being done outside of traditional cataloging teams (CMET, MPCU)
    o LT3s in all teams do low-level project management – work very independently
    o DBM, authority control, added copies/vols, transfers, withdrawals done in CMET
    o MPCU specializes in preservation and binding but staff there are also doing cataloging, retrocon, and digital collections work
        ▪ Some staff have also received training working in the Beach Conservation Lab
    o ISC specializes in digital and photographic reproductions and serving patrons directly (closely tied to Special Collections and ISC supervisor continues to attend SpecColl meetings)
    o digital collections work directed largely by me, head of CMET, and ISC supervisor

- LT2s and LT3s assigned work on different collections after they volunteer for projects (some student support)
  - work in CONTENTdm and DSpace
  - trained by one of the 3 of us in metadata input and/or digitization standards
- metadata review done by me and head of CMET
- technical issues with software handled by head of CMET, with assistance from Systems occasionally
- we have developed guidelines for subject analysis of digital collections, scanning, OCR, name headings, etc.
- web development for digital collections done by me and CMET head
- 3 of us collaborate with other departments on development of digital collections
- authority control routines being developed for digital collections – trying to make it routine
  - o fly by the seat of our pants – need high degree of comfort with ambiguity and constantly shifting priorities

## Slide 33

How did we get here? Recap:

- o Gradual evolution
- o Working to acquire new skills (making time)
- o Taking on new work when asked
- o Seizing opportunities
- o Promoting a wider role for ourselves
- o Following through
- o Changing focus
- o Discussion

## Slide 34

Challenges

- Learning and keeping up with everything we need to know is difficult
  - o Competing standards and approaches; standards are changing constantly
  - o New software systems

- o Nothing comparable to MARC, AACR2, LIS – inventing it all as we go along
- Management challenge – looking for common ground in increasingly diverse department
  - o We've had fewer meetings – need to get back on track with these
  - o Need to keep pushing, changing in the face of some staff resistance
    - Less assertive people are having a harder time adjusting
    - Tension between previous competence-based culture to a collaborative culture
  - o Hard to find things we can talk about as a department
    - Too much depth in any one area and some people are lost or bored
- Too busy, lots of balls in the air
  - o Finding the time to pass on knowledge is hard
  - o Not taking as much time for reflection as we should (we follow the just-in-time, rather than just-in-case approach)
- Loss of experienced staff
  - o fewer of us to train others, resulting in decreasing expertise and depth in traditional cataloging within the department
  - o fear that we won't be able to keep up PCC commitments
  - o loss of highly-specialized knowledge (Music, Slavic cataloging)
- Redefining our focus from inward to outward – new mindset
  - o Much more of our time is spent working directly with external partners and with faculty and students

**Slide 35**

Successes

- Lots of work getting done
  - o 114% increase in traditional cataloging productivity in past 3 years
  - o retrocon more than halfway done (had been stagnant for a decade)
  - o 6 digital collections publicly available using CONTENTdm (5200 items since April 2003)
    - Setting policies and standards – not just a one-off, ad-hoc approach

- o Institutional repository is up and running (765 items in it so far with several major collections getting ready to come on board)
    - ▪ Expanded contacts with faculty, feeding discussions on scholarly communication
    - ▪ Providing a forum for the archiving of student scholarship
- Cross training opportunities abound
    - o People are discovering new strengths and interests and are able to utilize skills that were not tapped before (photography, subject expertise, etc.) – Adam is case in point
    - o Allowing people to volunteer for projects works well
        - ▪ people are engaged
    - o Because we have so many responsibilities, none of us can micro-manage; more staff at all levels are able to take the initiative and play a leadership role in some project
- Wider role within library and on campus
    - o The department is widely recognized and appreciated
    - o Strong support from Library Administration (Deb's poster child for transformative change)
- Greater collaboration
    - o within department, teams have a lot more overlap than ever before
    - o within library, it is natural for us to work with other units and departments – it is now the exception when we **don't** work with some individual or group external to our department
    - o we work for the Libraries and the University – increased identification with the institutional mission
- People having fun
    - o I (and others) look forward to coming to work every day
    - o Several previously disgruntled staff have now become key players in a positive way
    - o People who are bored have chosen to be