

The Story of University of Oregon's Metadata & Digital Library Services

TITLE SLIDE

Hello and thank you for having me here as a speaker.

I'm actually filling in for Carol Hixson, who left the University of Oregon in September to take a position as University Librarian at the University of Regina in Saskatchewan.

SLIDE 2 **

Carol gave me permission to present content taken from an hour long presentation she gave this past summer at the American Association of Law Libraries annual conference.

- ◆ I've had to cut out a lot
- ◆ I've also added a few things
- ◆ The vast majority of what's on the slides is taken from Carol's earlier presentation.
- ◆ I used a lot of what was in Carol's presentation notes, but don't assume she'd agree with everything I say.

The URL for Carol's presentation is given here and on the final slide.
This presentation will also be made available in the same repository.

Today I'm going to talk about the evolution of the University of Oregon's Catalog Dept. into Metadata & Digital Library Services.

SLIDE 3 **Catalog Department in 2000**

- ◆ In 2000, the Catalog Dept. contained 20 people.
- ◆ We were organized into cataloging teams according to format or language of materials, with an additional "catalog management and enrichment team," which is our fancy way of saying dbm and quality control.
- ◆ The department's sole responsibilities were:
 - AACR2/MARC cataloging,
 - Subject cataloging using Library of Congress Subject Headings,
 - Classification in the LC classification scheme,
 - Quality control and database maintenance in the online catalog
- ◆ There was limited retrospective conversion of monographs as items circulated and a continuing—if slow moving—project of serials recon.

- ◆ We were members of NACO, SACO and CONSER Enhance, and our CONSER statistics in particular were high considering the size of the collection and FTE in serials cataloging.
- ◆ We had a number of quality control routines in place and an excellent authorities specialist, so our online catalog was very clean.
- ◆ We had a monograph quickcat procedure in place in the Acquisition Dept. The LT monograph catalogers concentrated on higher-level cataloging, including creating original records and creating and editing NACO records.
- ◆ We also had in place a depository government document quickcat procedure for serials. The LT serials catalogers did work at all levels, up to and including CONSER Enhance and NACO.
- ◆ We had extremely dedicated librarians and staff. They were well-trained and had in general been at the university for a long time.
- ◆ Relations with other departments were generally excellent.
- ◆ AND, we were an ARL library without the staff or budget you find in ARL libraries.

Within 6 months of Carol's arrival in early 2000, the library underwent a change in leadership at the university librarian level with the retirement of our previous UL. Deb Carver, AUL for Public Services, became Interim UL at this time and was later hired as permanent university librarian.

But in late 2000, Deb was in an interim position, we were in the middle of a hiring freeze and the library wanted to move forward with new initiatives. In the Catalog Dept., we were concerned about remaining an important part of library functions. We wanted to make sure we continued to play a viable role during the digital era.

SLIDE 4 Expansion and redefinition

Our initial expansions of duties and scope after Carol arrived may not seem to be directly relevant to the topic of the "digital age," but they're important because they signaled a willingness—on the part of practically everyone in the department—to break out of the very focused role we had traditionally played. This part of our evolution also showed our ability to both increase the quality of high-level work and embrace the idea of different levels and types of description for different materials.

One of the first things that happened was that we expanded our PCC participation to BIBCO and full CONSER membership. Both professional and paraprofessional catalogers received the necessary training to take part in both programs.

At the same time, we began a concerted retrospective conversion effort using standards that were vastly different from those used in the past. When reclassification from Dewey to LC was seen to take more time than any other recon procedure, we stopped reclassing materials. This was a major concession on the part of both catalog dept. and public service staff.

Carol began working with Special Collections on manuscript cataloging, and with the Map Librarian on map cataloging.

We instituted a collection-level cataloging standard for the first time and began using it to catalog some documents collections and special collections.

We had loaded a few collections of vendor-supplied records in the past but did not have a routine process in place to do this. Now, we created standards for what we would accept, and what we would and would not do to the records. And, we looked at increasing the number of record sets purchased.

With all these changes—and more—and with no increase in staff or other support, we increased productivity by 114% by Feb. 2003.

SLIDE 5 Expansion and redefinition: New Services & Approaches

I've already mentioned that we had begun to use different levels and types of cataloging for different materials. As part of this, we also began using different metadata schema.

For manuscript collections, we chose encoded archival description and catalogers were trained in the markup language. Special collections staff were trained to provide all of the metadata for manuscript collections.

For digital collections, we defined a set of modified Dublin Core elements and Catalog Dept. staff were trained to use these elements in the description of images.

On another track, in mid-2001 we began adding non-library collections to the online catalog. These are collections housed within academic departments. They're in the library catalog as a service to the various departments involved. The items are only available to members of the home department. There are now 6 departmental collections included in the online catalog and the service remains available to any others that would like to make use of it.

I already mentioned that Special Collections staff were trained to provide metadata. We also trained Documents Center staff for this. We're currently looking at ways to expand this training to more units.

In order to succeed with all of this revamping, it was necessary for us to radically change our way of thinking. Instead of measuring success according to high quality and high production values, we instituted a system whereby there was a floor beneath which we would not go. That floor was different for different activities and different types of material. And as I noted, productivity increased by 114% in 2 years.

I'd like to note that Carol made staff participation in any of the new efforts completely voluntary. Even today, participation is voluntary for staff who were in their positions prior to 2000.

When we are able to fill open positions, we invariably re-write them to include new types of metadata and support for digital collections. We've also been altering the position descriptions for those who volunteered, so they include these duties as well. Gradually we're getting one or both of these things written into most positions.

SLIDE 6 Expansion and redefinition: Preservation Dept., etc.

The Preservation Dept. was merged into the Catalog Dept. in early 2001. They became what is now our Materials Processing and Conservation Unit.

Our institutional repository was in place by 2003, with Carol as the coordinator and main impetus behind its success.

Since then a number of dept. staff have been involved in making the IR grow to its current size of over 3000 items. We now have a half-time position devoted exclusively to the work of adding materials to the IR and supplying the metadata, but others in the department continue to do this work as well.

Serious work on digital collections began in 2003. This work was centered in the Catalog Dept. and led by Carol. One of the results of her—and our—success in this area was a name change at the end of 2003, when we became Metadata & Digital Library Services.

As part of our new scope, the Image Services Center was merged into MDLS in mid-2004. The inclusion of ISC in MDLS has facilitated a more streamlined workflow in the creation of digital collections.

Metadata & Digital Library Services is very different from what was the Catalog Dept. We have created and continue to add to or maintain numerous digital collections within ContentDM. We continue to coordinate and are responsible for over 90% of the submissions to UO's institutional repository. We work in several metadata schema and have expanded our technology skills. And, we still do traditional cataloging, dbm and authority work.

SLIDE 7 Other changes in the digital era

Of course there were other things happening during this time as well. The ones I've listed here are all related to serials and very similar to what other institutions have been going through.

The change in work and workload related to serials has extended beyond the Serials Team. Monograph catalogers have helped with e-journal projects for many years and are now helping with cleanup and maintenance related to our electronic resource module.

This leads me to an important point: people from various teams take part in various projects. So, although our team structure remains divided according to format and language, the actual work done by staff crosses team boundaries. The teams remain in place so that each staff person has one home base and one supervisor. They still get to retain a certain distinct identity but they work in a variety of areas.

SLIDE 8 New skills

Obviously, all these changes and new duties have required us to build new skill sets. This has included things like learning new metadata schema and new subject & thesauri vocabularies, as well as training in content analysis for images.

We've had to acquire departmental knowledge of new standards, although this knowledge currently resides in a very limited number of people—and much of it in one person only.

SLIDE 9 New skills

A number of MDLS staff have been trained in scanning and OCR, and do these tasks regularly. In general these low-level tasks are only a small part of a person's work, and are only done for material that the person will then be supplying metadata for. When we're on a time-sensitive or large project, the amount of scanning and OCR picks up considerably. In some cases, such as grant projects, we may hire students to do this work.

Harvesting of web pages comes into play with our institutional repository. This is done by several staff and is part of the process of submitting items to the IR. Usually one person will go through the entire process for an item—from harvesting (or scanning) through supplying of metadata and submission of items.

SLIDE 10 New orientation and focus

MDLS has so successfully re-oriented itself that our Dean of Libraries, Deb Carver, has been known to call us "the poster child for transformative change." We did not wait for

someone else to come along and define for us who we should be or how we should evolve. With Carol's leadership, and to her great credit, we reinvented ourselves.

In addition to the practical part of learning new skills and taking on new duties, the department philosophy—and reality—became immersed in the themes shown here:

- ◆ We are very much project-oriented
- ◆ We have a commitment to lifelong learning on the part of all staff
- ◆ Our work is largely cross-functional and cross departmental, meaning we work closely with other departments on projects and library initiatives;
- ◆ And last—but definitely not least—our focus is totally outward.

We spend our time in collaboration with others, particularly our colleagues in public service-oriented departments.

We work closely with those departments that want to start new digital collections.

Coordination of our institutional repository means we are in frequent communication with academic departments, working with them to set up and maintain their communities and collections.

We also play a large role in many library-wide initiatives and projects.

SLIDE 11 MDLS today

I know this is probably too small for you to read. I've included the URL so you can look at it later.

If you go take a look at the MDLS homepage and compare it with slide 3—which covered what the Catalog Dept. was responsible for—you'll see just how radically we've changed.

Much of what is listed on the homepage is outwardly focused. You'll see that nothing on this first screen is directly related to any of the tasks listed on slide 3.

SLIDE 12 MDLS today

We're still doing all the things that were listed as Catalog Dept. responsibilities. However, our focus even in these areas is outward. The first priority is assisting our users and making things as easy for them as possible. This screen shot of the lower portion of our homepage lists some more of the things we do and emphasizes how they effect our users.

SLIDE 13 How did we get there?

Carol Hixson's leadership was a large factor in our success and she has laid out the necessary elements for us here:

- ◆ Our evolution was gradual and continuous,
- ◆ Various people took the necessary time to acquire new skills,
- ◆ When we were asked to do more, we did
- ◆ When opportunities came along, we took them
- ◆ But we didn't sit back and wait for others to come and tell us what to do or offer options. Carol was extremely skilled at promoting a wider role for the department and others have followed in her footsteps. We continue to market ourselves successfully.
- ◆ Follow through is very important. Don't just say you'll do something—really do it
- ◆ We made a conscious choice to change our focus from solely AACR2/MARC cataloging to a much wider range of responsibilities and an outlook firmly grounded in the needs of our users.
- ◆ Librarians in the department keep up with new ideas and trends
- ◆ But most importantly of all—staff in the department have put forth the effort and been extremely flexible. This didn't come naturally to everyone and required practice on the part of some. Many of those who seemed least comfortable with change originally, are now proactively leading the way to yet more change. They've not only learned to be flexible, they enjoy it!

SLIDE 14 Making connections

To skip briefly to another topic of today's program, this slide gives a brief rundown of the ways in which we make connections between various resources.

SLIDE 15 Future connections

And here are a couple things that are currently being worked on.

MetaIndex is a metasearch product that we're trying to make work with our institutional repository and digital collections. Once we do, how it's implemented will be largely up to the library's meta search initiative—though we do have a strong presence on that initiative.

SLIDE 16 Contact information

SLIDE 17 Acknowledgements

Finally, I want to again thank Carol Hixson for giving me permission to use the content from a presentation she gave in the summer. Almost everything in my slides and much of my talk today was taken from this source. The full version of her presentation, given as an hour-long session at the American Association of Law Libraries annual conference, is available at the URL given here.