



Metadata and Digital Library Services

ACCESS TO COLLECTIONS

[Final report of the Access to Collections Initiative \(2000-2002\)](#)

While the initiative group has completed its work, the effort of improving access to the Libraries' collections continues. New projects and strategies involving all departments are developed, collection rankings are revised, new collections are tracked, and more collections are made available to the Libraries' users. Progress on collections can be tracked by checking the [completed list of ranked collections here](#). This spreadsheet is revised twice a year to reflect work completed and new collections added.

In addition, uncataloged collections are also being tracked in the Libraries' catalog (in the technical mode so that records are suppressed from public display.) A search in the technical mode of the catalog under the title "uncataloged collections" will reveal all of the collections that are being tracked in this way.

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COMMITTEE MEMBERS:

Carol Hixson, Metadata and Digital Library Services, Facilitator
Carol Lenocker, Metadata and Digital Library Services
Lara Nesselroad, Science Library
Lori Robare, Metadata and Digital Library Services
Lonni Sexton, Metadata and Digital Library Services
Shelia Stigall, Knight Access Services
Susan Storch, University Archives (*served 10/00-6/01*)

BACKGROUND

Providing physical and bibliographic access to all library collections is an essential part of the total process of organizing and presenting information. Ensuring physical access means that stacks, whether open or closed, are maintained in good order so that library users or staff can find materials where they are supposed to be when they are supposed to be there, as well as making sure that the materials are in a condition that they can be used. Physical access also means that special equipment that may be needed to make use of some materials is available and in good working order, including network and other connections for the growing array of digital resources. Ensuring bibliographic access means that the contents and carriers of the materials we acquire (physically or virtually) are analyzed and described in a consistent way so as to enable people to locate relevant information and choose between a variety of similar materials without necessarily needing to examine every resource personally. Timeliness and comprehensive coverage are essential components of quality bibliographic access.

CHARGE

The University of Oregon Library Administration charges the Task Group on Access to Collections to develop appropriate subgroups and work closely with the responsible units and departments of the Library System to:

- Review the condition of the open and closed stacks in the different libraries to determine the effectiveness of retrieval, the physical condition of materials, and turnaround times for shelving; work with the responsible units or departments to set guidelines or standards for all of the above
- Inventory collections that are not yet under bibliographic control; set priorities for the order in which they should be processed and develop a master plan for completion
- Review the remaining collections needing retrospective conversion; set priorities for the order in which they should be converted and develop a master plan for completion

TIMEFRAME

Interim reports from the various subgroups due in six months from the date of the charge.

EVALUATION

Work will be ongoing. Success of the efforts will be determined by meeting the timelines, by reducing or eliminating backlogs of work, and by conducting periodic user surveys to gauge satisfaction and modifying services in response.

Drafted by Carol Hixson, rev. 000908

<http://libweb.uoregon.edu/catdept/home/accesstaskgroup.html>

Last revision: March 14, 2005 by Carol Hixson

Created by [Carol Hixson](#), University of Oregon Libraries



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Metadata and Digital Library Services

BIBLIOGRAPHIC ACCESS AT THE UNIVERSITY OF OREGON: AN OVERVIEW

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What is bibliographic access?

Bibliographic access is the systematic description and analysis of library materials to enable people to find, select, and retrieve (physically or virtually) those same materials. Bibliographic access has traditionally been considered to be the province of cataloging departments. In reality, however, there have always been some types of bibliographic access that have been provided by groups other than catalogers: for instance, bibliographies have traditionally been provided by subject specialists and many indexes and abstracts have been provided by commercial vendors. With the explosion of new metadata schemes and new technologies, there are many possible ways of providing systematic bibliographic access to a wider range of library materials.

What is metadata and why do we care about it?

The term metadata has been used only in the past 15 years, and has become particularly common with the popularity of the World Wide Web. Metadata refer to structured data about data, the process of providing consistent labels to identify the function of different types of data within a document. In the library world, the term refers to any data used to aid the identification, description and location of library resources. Library catalogs, based on the MARC format, represent a well-established variety of metadata. Many different metadata formats now exist, some much simpler than MARC, such as Dublin Core, and others more complex, such as EAD. Although the level of detail and the labels used to characterize data differ from one metadata scheme to another, all schemes provide, to some degree, the elements needed to identify, describe and provide some level of access to the data being documented. See <http://libweb.uoregon.edu/~catdept/home/metadata.html> for more detail about some of the different metadata schemes being developed and used today.

The concept of metadata is being widely discussed today because almost all of us use it, in some fashion, when we make documents or information about library materials available in electronic form. When someone sets up a database with distinct fields or areas to record different kinds of data, they are using metadata. Many of our user communities are developing and using their own specialized metadata schemes. We care about metadata because we need to share our expertise and develop enough common ground between the different schemes so that we can readily share the information from one system to another.

What are some of the options for bibliographic access?

Not all of the following options for bibliographic access are performed by Metadata and Digital Library Services staff. The various options require different degrees of training for the people carrying them out and some take longer than others. Available staffing resources will always be a factor in deciding what level of access is appropriate and when it can be carried out.

- **In-house cataloging:** item-level (a detailed record describing the extent and analyzing the content of an individual bibliographic resource) or [collection level](#)

Bibliographic and authority records created or edited by UO Library staff using the

MARC format and loaded from OCLC into the local online catalog. These records conform to international standards in a cooperative environment with thousands of other libraries so that libraries can share data and records and avoid duplication of effort.

- **Vendor-supplied records to be loaded into the online catalog**

Records created by vendors using a version of the MARC format and loaded into the local online catalog. These records often follow minimal standards and generally lack authority control. The vendors will sometimes customize the data in the records, for an additional fee. Some examples are: [OCLC set records](#) , [Marcive records](#), [Ebsco aggregator records](#), etc.

- **Brief bibliographic records (brief bibs) in the online catalog**

Records created to provide immediate and temporary control of uncataloged items. Brief bibs are typically created by Acquisition staff to provide a basic level of author, title, publication information for identification purposes to which order information can be attached. These records provide some bibliographic access to items in cataloging backlogs. It is expected that such records will be replaced by fuller bibliographic records when the items are cataloged.

- **On-the-fly records**

Records created by Circulation staff for older items that have already been cataloged but that are not yet represented by bibliographic records in the online catalog. These records contain basic author, title, and call number information to which an item record is attached for circulation. It is expected that such records will be replaced by fuller bibliographic records when the items are retrospectively converted.

- **Locally-created Web lists**

Lists of resources displayed on a Web site, often arranged under broad subject terms. Links are sometimes provided to cataloging records or lists may be generated automatically from data in catalog records, as with many of the [University of Washington subject lists](#) . They may also exist in complete isolation from cataloging records. Such static lists are often created by systems, collection development, or reference staff independently of the traditional cataloging process and require revision of the entire document to be updated.

- **In-house databases created and maintained by local library staff**

Computer databases available through a stand-alone computer, in a networked environment, or through a Website. Some databases may be linked to the catalog through MARC records describing the database, such as the [PPPM Terminal Projects Database](#).

- **Finding aids**

Descriptions of archival and manuscript collections. They include a scope and content note and often a box and folder list or "inventory" of the collection. They may be in paper or electronic form. Encoded Archival Description ([EAD](#)) is the current archival standard for web-based finding aids, but they might also be encoded with HTML. A trial database of EAD finding aids is available at the Northwest Digital Archive at http://nwda.wsulibs.wsu.edu/project_info/index.asp

Is there a right way to provide bibliographic access to library materials?

We believe that there is no single "right" way to provide bibliographic access. Different materials require different levels of access and people from all areas of the library can contribute successfully to the effort. More effective bibliographic access can be achieved, however, when the different service and user groups approach the provision of access as a partnership. We believe that there are

several ways to accomplish this and offer the following recommendations:

- Develop a set of guiding principles for all databases, finding aids, bibliographic records, etc. developed by UO Library staff.
- Develop a set of "core" elements that all databases, finding aids, bibliographic records, etc. developed by UO Library staff will contain to avoid the duplicative effort of examining the same issues over and over again. Having a set of core elements does not require one particular type of access, nor does it preclude the inclusion of additional, unique data elements.
- Share information about specialized collections of materials that need some level of bibliographic access with colleagues and information about existing databases, finding aids, records, etc. that have already been developed to provide some level of bibliographic access.
- Work towards the goal of centralized access to all library resources, through a library portal, so that users don't have to navigate through many different Web pages and links. Build on the existing strength of the online catalog, where possible. Strive towards greater interoperability.

Drafted by Library Initiatives, 2000-2001, Access to Collections Group, February 2001. Minor editing has been done since then to keep links current and terminology up to date.

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<http://libweb.uoregon.edu/~catdept/new/bibaccess4.html>

Last revision: February 27, 2004 by Carol Hixson

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Metadata and Digital Library Services

METADATA LINKS

This page is intended to serve as a quick link to a variety of standards and metadata schemas being investigated, consulted, or actively used at the University of Oregon Libraries. It is not comprehensive.

[Metadata and Digital Library Services](#)

[Metadata Implementation Group](#)

[Digital Content Coordinators](#)

- [CSGDM \(Content Standard for Digital Geospatial Metadata\)](#)
- [Dublin Core](#)
- [Dublin Core Library Application Profile](#)
- [EAD](#)
- [GILS](#)
- [IFLANet Digital Libraries Metadata Resources](#)
- [MARC](#)
- [MARC XML](#)
- [METS](#)
- [MODS](#)
- [MPEG-7](#)
- [NARA Records Management and Metadata Schema Project](#)
- [PBCore](#)
- [TEI](#)
- [VRA Core](#)
- [Z39.50](#)

<http://libweb.uoregon.edu/catdept/home/metadata.html>

Last revision: September 1, 2004 by Carol Hixson

Created by Carol Hixson chixson@darkwing.uoregon.edu University of Oregon Libraries

Reading and Understanding the Survey Results

Each spreadsheet reads and prints from left to right. Data for each collection spreads across four pages. Most of the information should be self-explanatory but there are some terms or abbreviations that might be confusing. Referring back to the survey form

<http://libweb.uoregon.edu/~catdept/new/uncatsurvey.html>

will be helpful in understanding the data that has been collected.

On the **Uncataloged Collections Survey Results: General**

In column H, labeled **CONDITION**, "F to G" means "fair to good", "G to E" means "good to excellent."

In column M, labeled **ACCESS DESIRED**, there are two primary options: "item" means that access is requested for each unique item; "collection" means that one record has been requested to provide access to the entire collection regardless of the number of individual items it contains.

In column R, labeled **DISPOSITION/PRIORITY**, there are three possible rankings:

A has been used when, in the judgment of the Access to Collections Group, the Library is ready to proceed, the people are available to do the work, and this could be completed relatively quickly;

B has been used when we believe it would take a lot of time, money, or staff and the work would be an ongoing effort;

C has been used when, in our judgment, nothing can be done until some other issue is resolved.

Column S, labeled **EST. HOURS/COST**, contains dollar signs to indicate how expensive the group thinks it would be to complete the collection and, when feasible, the estimated number of hours we think it would take. In general, the dollars and # of hours have been coded as follows:

5-200 hours	\$
201-2000 hours	\$\$
2001-5000 hours	\$\$\$
5001-20,000 hours	\$\$\$\$
over 20,000 hours	\$\$\$\$\$

Column T, labeled **WHEN TO BEGIN**, has often been left blank because the Group expects collection managers to play a key role in setting overall priorities after reviewing all of the uncataloged collections that have been reported throughout the Library.

To: Library Council
 From: Carol Hixson, Facilitator, Access to Collections Group
 Subj: Uncataloged collections
 Date: September 20, 2001

Background

The spreadsheets of uncataloged collections have collected the responses to the Access Group's Uncataloged Collections Survey put out in March of this year. Prior to distributing the survey, the Group outlined a variety of bibliographic access options, including:

- in-house cataloging using MARC (both item and collection-level)
- vendor-supplied MARC records
- on-the-fly circulation records
- brief bibs
- locally-created web lists
- locally-created databases
- finding aids

Summary results

The survey form allowed respondents to choose any of these options (except on-the-fly records which are designed for temporary circulation control) or to specify their own approach. Of the 78 responses, 44 selected standard item-level MARC cataloging as the preferred option, 24 chose collection-level MARC cataloging, 7 were undecided, 2 wanted locally-created databases, 1 wanted EAD (in addition to collection-level MARC), and 1 requested brief bibs in Janus. The total output requested is approximately 500,000 MARC records, with a scattering of other means of access.

Some elaboration on the manuscripts entry is needed. Linda Long had responded several months ago with an estimate of approximately 2000 manuscripts collections that needed bibliographic access. She has been working for some months on compiling an online inventory listing all of the manuscript collections and how extensive they are. She has recorded 2251 separate manuscript collections so far and estimates that she has about another 20% to record. The Catalog Department and Special Collections have been working together for many months to develop a team approach to cataloging these collections and our first records will be entered into the OCLC database and our local catalog next week.

Local resources

Since the primary mode of access requested was for MARC cataloging, a brief outline of available resources will help set the stage. 17 (14.75 FTE) of the positions in the Catalog Department are devoted primarily to cataloging new materials. Three of those cataloging positions also have subject specialist responsibilities, so the FTE available for new cataloging is actually closer to 13.5. In addition to these cataloging positions, 8 positions are devoted to physical processing and conservation; 4 are devoted to retrospective conversion, database maintenance, and authority control; 2 (1.5 FTE) are devoted to administration; 1 position is vacant. Last year, 59,448 bibliographic records were added to the database (up 21.4% from last year), 13,000 of which were retrospective conversion and another 8600 of which were tape-loaded from Marcive.

Recommendations:

- 1) Treat as high priority all collections where collection-level access has been requested.
- 2) For other large collections that have requested item-level access, create a collection-level record in the interim to provide a pointer to the existence of the collection.

To:

- 3) Establish a subset of the Access group, consisting of representatives from the big areas holding large collections of uncontrolled materials, subject specialists, Collection Development, and Cataloging, to review the collections survey and make recommendations for the priority in which collections should be made bibliographically accessible.
- 4) Explore grant funding and other options for providing access to these vast collections.



COLLECTION PRIORITIES SUBGROUP

of the Access to Collections Initiative

[Final report](#)

While the group has completed its work, the Head of Cataloging continues to confer with the Head of Collection Development and Acquisitions and various collection curators to keep informed of newly-received collections and to revise rankings of collections as institutional priorities change.

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Background or Working Documents

- [Complete Ranked Listing of Uncataloged Collections \(last revision May 2003\)](#)
- [Complete Listing of Uncataloged Collections, September 2002](#)
- [Collection-Level Rankings Worksheet, revised September 2002](#)
- [Item-Level Rankings Worksheet, revised September 2002](#)
- [Uncataloged Collections Survey Results: General](#)
- [Uncataloged Collections Survey Results: Photograph Collections](#)
- [Reading and Understanding Survey Results](#)

Minutes

- [October 19, 2001](#)
- [November 1, 2001](#)
- [November 16, 2001](#)
- [December 6, 2001](#)
- [January 10, 2002](#)
- [February 7, 2002](#)
- [February 21, 2002](#)
- [March 7, 2002](#)
- [April 26, 2002](#)
- [May 13, 2002](#)

Charge and Membership

Membership: Carol Hixson and Faye Chadwell (*co-chairs*), Mischa Buczkowski, James Fox, Robin Paynter, Tom Stave, Ed Teague.

Charge: Using the surveys of uncataloged collections prepared by the Access to Collections Group the Subgroup on Collection Priorities is charged to:

- establish criteria for setting priorities for providing access to the surveyed collections
- rank the surveyed collections using the established criteria
- review the various options for providing access and make recommendations for specific collections
- recommend collections that would be suitable for outsourcing or grant applications

Recommendations from the subgroup will be submitted to the Access to Collections Group and then to Library

Council.

Timeline for completion: June 30, 2002.

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<http://libweb.uoregon.edu/catdept/new/collecpriority.html>

Last revision: November 28, 2003 by Carol Hixson

Created by [Carol Hixson](#), University of Oregon Libraries



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Collection Priorities Subgroup Meeting Minutes

October 19, 2001

Present: Carol Hixson, Faye Chadwell, Mischa Buczkowski, Robin Paynter, Tom Stave, Ed Teague

Absent: James Fox

Meeting Schedule

The group tentatively decided that it would meet on the first and third Thursday of each month, from 11:00-12:00. Meetings will not ordinarily be canceled because a single member is out of town; there will likely be many times when not every group member will be able to attend. If, however, one group member is frequently unable to attend, a substitute may be sent in his or her place. All meetings will be open to any interested person. Hixson will reserve a meeting room.

Criteria

The group reviewed the questions that Hixson had sent out previously via email as possible criteria:

1. give higher priority to collection level records that can be handled more quickly
2. look at the priorities the collection curators have already provided and see how many fall out as high priority
3. should higher priority be given to small collections that would be easy to complete?
4. consider what kind of access already exists for the materials (database, printed list, etc.): should lower priority be given to collections that already have some form of access?
5. consider whether the collection has staff available to help with providing physical access once bib access is achieved - if staff are not prepared for the extra service demands on the collection, should providing bib access be a lower priority?
6. is the collection something unique that a grant-funding agency would be interested in? also think about impact on Library staff to run a grant project - is it feasible to run multiple grant projects simultaneously out of the same unit?
7. is the collection something that another Orbis library might have and might they be interested in a joint effort?

8. are there set records available that could be purchased for loading?
9. is it the type of collection that we could outsource to a vendor? could we afford to outsource it?
10. staffing levels: factor in other ongoing bib access efforts, such as providing access for new receipts and retrocon
11. what is our expectation for when access should be provided to all the surveyed collections? is it possible or desirable to reach the point of having no backlogs?

Discussion of individual points:

1. Hixson noted that this had been recommended to Library Council and accepted; Catalog Dept. staff have already begun working on these. In some cases, this is simply an interim measure until full access can be provided. The idea behind this is to provide a collection-level record that will point to the existence of a larger collection until such time as access can be provided to individual items within it. Stave noted that one example of a collection level record that serves this purpose is the PPPM terminal projects database. Teague wondered if we should reconsider the requests for item-level access and just accept collection-level records, since it seemed unlikely that we could provide the item-level access. Hixson reiterated that the collection-level records were intended to be an interim measure, that many collections consisted of materials that would not be well served in the longterm by a collection-level record because they had nothing in common other than their format or the fact that everything in them had been donated by the same person, and that there was the expectation that item-level access could eventually be provided and the subgroup should proceed with setting priorities according to whatever criteria were established.

2. The group agreed that the priority requested by the collection curator should be taken into consideration in setting overall priorities.

3. It was decided that size should not be a determining factor in prioritizing a collection, although it might be considered as a way to make a distinction between several high-priority collections. Stave pointed out that providing quick access to a small, high-priority collection might build morale and momentum.

4. Paynter was concerned that we not assume that our users would be sophisticated enough to know about the existence of another finding aid or be able to use it effectively. Another concern is how readily available the finding aid or database is to the public. It was also noted that some databases might have been created expressly for the higher-priority materials and the existence of such a database should not automatically bump them down in the priority ranking. Stave noted that sometimes they were created because there had never before been the expectation that any other type of access might be possible. The group agreed that this should be a factor in setting priorities but not necessarily a determining factor.

5. The group agreed that ability to provide physical access should be a factor in deciding to provide bibliographic access. Although it was also pointed out that a collection curator might decide to push ahead with bibliographic access in spite of increased demands on staff; increased use of a collection could serve as a justification for assigning more staff to that service point. Paynter expressed a concern about the proliferation of sublocation codes in the public catalog and how confusing this could be to users. The group agreed that this should be monitored.

6. Teague wondered if this group were qualified to make determinations about grant funding. Hixson responded that the presence on the group of three of the curators of some of the larger

uncataloged collections should provide some knowledge of the potential for grant funding and that other people, such as Lisa Manotti, could be consulted. Also, the group was just discussing whether this is a valid criteria to consider. It was pointed out that it should be broadened to include any source of outside funding. Chadwell noted that having the surveys and developing collection-level records to point to collections could also serve to generate interest in specific collections and bring in outside funding. The group decided to keep this on the list of factors to be considered in setting priorities, noting that money to process a collection would bump it up to a higher priority as a matter of course. Some collections might be considered a low priority unless outside funding to provide access to them became available. Chadwell also wanted us to remember that new collections could be added to the mix and that they should be added to the inventory and list of priorities.

7. Chadwell noted that the Orbis Collection Development Committee could spur more regional collaboration. A meeting of the Orbis CD committee to review this survey and to suggest that other libraries take a similar step can be scheduled. There is already an [inventory](#) available on the Orbis CDC site that could assist in this effort. The group wondered if other Orbis libraries had undertaken a similar effort and if they were doing collection-level records. Hixson suggested that a message could be posted to the Orbis Catalog Committee's list to start this discussion. The group concluded that possible collaboration with other Orbis libraries should be a factor in setting priorities.

8. Hixson explained what was meant by set records. The group agreed it should stay on the list of factors to consider.

9. The group briefly discussed outsourcing possibilities and the upcoming work of the Shelf-Ready initiative and agreed that this should remain on the list of factors to consider.

10. Hixson noted that staffing levels will inevitably be a factor in setting priorities. Teague asked if other staff could be brought in to assist. Hixson noted that this has already been going on, citing her work with Special Collections staff to do MARC cataloging of manuscripts and archival collections. It was pointed out that the possibility of providing assistance was one of the questions asked in the collections survey and was anticipated as being a factor in setting priorities for providing access.

Other factors to consider in setting priorities were suggested and validated during the discussion. These include:

- known faculty research interests (Chadwell noted her plan to put this on an upcoming Collection Development meeting agenda and encourage participation of more of the subject specialists)
- user requests that might be generated by the collection-level records
- known interest within the Orbis community

The next meeting will be November 1 from 11-12.

notes by Carol Hixson

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Collection Priorities Subgroup Meeting Minutes

November 1, 2001

Present: Carol Hixson, Mischa Buczkowski, Robin Paynter, Tom Stave,

Absent: Faye Chadwell, James Fox, Ed Teague

Review of Criteria

The group reviewed the criteria for ranking collections that had been discussed at the first meeting. Some modifications were made and the criteria were grouped into **Primary** and **Qualifying** characteristics. The list of criteria agreed to by the group was:

Primary factors:

- The priority requested by the collection curators
- What kind of access already exists for the materials (database, printed list, etc.)
- Known faculty research interests or known interests at the regional or consortial level (taking into account overall impact, as well)

Qualifying factors:

- Ability to provide physical access to materials (service issues, conservation needs, etc.)
- Balancing priorities between the major collection areas (so that no single area receives preferential treatment)
- Staffing levels and in-house expertise in Cataloging and other departments
- Size of the collections when reviewing two or more collections that are of roughly equal priority (Quick wins may boost morale and build momentum)
- Opportunities/possibilities for outside funding. The awarding of a grant or other outside funding might raise a collection to a higher priority
- Opportunities for regional cooperation, such as through Orbis
- Availability of records for use for copy cataloging or for purchase from an outside vendor or existence of a vendor to whom records could be outsourced
- Specific user requests, whether generated by collection-level records or through other means

Methodology

After agreeing on the list of criteria to be considered, the group discussed the methodology it would follow in ranking the collections. Hixson noted that what she hoped to get at the end of the process was a list with all collections ranked from 1 to whatever. If some factor for a particular collection changed after the initial ranking by the group, the collection's ranking would be re-evaluated (by this group or another appropriate group) and might be placed higher or lower in the list.

The group determined that it would begin by examining those collections rated as a **high** or **urgent** priority by the collection curator. In the first pass, the group would discuss the **Primary** criteria. Each group member would give the collection a numerical ranking based on the discussion. Subsequently, the group would share their individual rankings for the high priority materials and arrive at a group ranking by discussing the **Qualifying** criteria. *(The collections currently designated on the general survey as high or urgent priority are those beginning on lines 301, 306, 312, 379, 400, 428, 434, 441, 445, 454, 560, 569, 573, 581, 615, and 654.)*

When consensus is reached on the high priority materials, the group will proceed to review the **medium** priority materials according to the same methodology. Following that, the group will consider the collections designated by the collection curators as **low** priority.

Next meeting

The next meeting will need to be rescheduled since at least three of the group members will be unable to attend. Hixson will email the group to reschedule it.

notes by Carol Hixson

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Collection Priorities Subgroup Meeting Minutes

November 16, 2001

Present: Carol Hixson, Faye Chadwell, James Fox, Robin Paynter, Tom Stave, Ed Teague

Absent: Mischa Buczkowski

Criteria and rankings

The group reviewed the primary and qualifying factors and began to try to apply them to the collections ranked as high or urgent. As the group worked through the first few collections, some criteria were consolidated or eliminated and others were deferred until later. The agreed-upon factors for the initial ranking now are:

Primary factor:

- The priority requested by the collection curators

Other factors:

- The kind of bibliographic access that already exists for the materials (database, printed list, etc.)
- Known research interests or known interests at the regional or consortial level (taking into account overall impact, as well)
- Ability to provide physical access to materials (service issues, conservation needs, etc.)
- Staffing levels and in-house expertise in Cataloging and other departments and size of the collections (relates to amount of time that will be needed to conserve, catalog, label, etc. the items in the collection)
- Availability of records for use for cataloging

Factors to be considered after initial ranking:

- Opportunities for regional cooperation, such as through Orbis
- Specific user requests (whether generated by collection-level records or through other means)
- Balancing priorities between the major collection areas (so that no single area receives preferential treatment)
- Opportunities/possibilities for outside funding (The awarding of a grant or other outside

funding might raise a collection to a higher priority)

- Availability of records for purchase from an outside vendor or existence of a vendor to whom records could be outsourced (considered more of a secondary factor since would require additional money and/or investigation)

Chadwell recommended a matrix to review each collection according to the criteria and Paynter recommended a numerical scale. The group adopted both suggestions. The scale of 1-5 was agreed on, with a ranking of 5 in a given category resulting in a higher priority. Those collections with higher numerical values would be considered to have a higher priority in the queue for the provision of bibliographic access. The factors ranked in this way are:

- current bib access (a ranking of 5 would mean that there was no existing bib access and a smaller numerical ranking would mean that there was some kind of bibliographic access. We noted that some collections have been provided interim bib control precisely because of their value and that factor should be considered in the ranking)
- research interests (a ranking of 5 would mean that the collection had very high research value and a lower numerical ranking would reflect less widespread research value; this will also factor in the distinction between collections that may enjoy the intense interest of a few researchers and collections that may support a broader range of research but at a lower level of intensity)
- ability to provide physical access (a ranking of 5 would mean that there would be no new demands placed on the collection for providing physical access beyond what currently exists and a lower numerical ranking would reflect that some new service demands would be placed on the collection)
- Staffing/size (a ranking of 5 would mean that it would take relatively little (5-1000 hours) staff time to provide bibliographic access to the collection and a lower ranking would reflect greater amounts of time needed. This criteria also takes into account staff time needed to repair, label, or otherwise prepare materials for physical use)
- Availability of records to be used (5 would mean that very useable records were readily available or could be easily generated and a lower numerical ranking would reflect less availability of useable records)

The group worked through three collections using the matrix. After the initial numerical scores are arrived at for each of the high/urgent collections, the group will decide which factors may need to be weighted more heavily and will prioritize further based on additional discussion of the criteria.

Other issues

The group would like to have a list of the collections already slated to receive collection-level records so that they could prioritize the order in which those should be completed. The first few collections that the group started to review were in that category and had already had some work done on them.

The group also discussed its role in setting priorities for the photograph and manuscript collections. It was agreed that Special Collections and University Archives staff had responsibility for determining the priority order in which individual collections would be processed but this group would play a role in determining where they fit in with the Library's overall priorities.

Action items

Hixson will supply the list of collections destined to receive collection-level records so that the

group can determine the order in which they should be done.

Hixson will develop a chart using the matrix and the point scale developed by the group to keep track of the group's initial ranking of the individual collections.

The next meeting will be December 6 from 11-12 in the West Conference Room.

notes by Carol Hixson

Back to [Collection Priorities Subgroup](#)



Collection Priorities Subgroup Meeting Minutes

December 6, 2001

Present: *Mischa Buczkowski, Faye Chadwell, James Fox, Carol Hixson, Robin Paynter, Tom Stave, Ed Teague*

Hixson handed out a chart for the group to work with in doing the rankings.

The group continued reviewing the collections already designated as high priority. Stave reiterated his concern that some of the criteria would need to be given greater weight than some others before a final ranking was achieved. The group agreed.

Another consideration to be taken into account will be whether or not we are the library of record for a particular collection. This will be added to the chart (now available at: <http://darkwing.uoregon.edu/~chixson/access/rankings.xls>). The group also discussed whether the prestige that a collection brings to the Library should be a factor in determining the priority for providing access to it. The group felt that it should be considered, although opted against making it a formal criterion.

The next meeting will be from 11-12 on December 20. Chadwell will find a room for the meeting and notify the group.

notes by Carol Hixson

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Collection Priorities Subgroup Meeting Minutes

January 10, 2002

Present: Carol Hixson, Faye Chadwell, Mischa Buczkowski, James Fox, Robin Paynter, Tom Stave, Ed Teague

Collection rankings

The group completed the evaluations of the collections designated as high priority. See the [chart](#) for details. Chadwell and Teague observed that the rankings of the collections could prove useful to other efforts, such as disaster planning. They also noted that this method of ranking could help in evaluating new gift collections

The next meeting will be from 11-12 on Thursday, February 7.

notes by Carol Hixson

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Collection Priorities Subgroup Meeting Minutes

February 7, 2002

Present: *Mischa Buczkowski, Faye Chadwell, James Fox, Carol Hixson, Robin Paynter, Tom Stave, Ed Teague*

Rankings

The group reviewed the rankings of the high priority collections and discussed the ranking criteria again. Chadwell and Hixson reviewed the group's charge and reminded everyone that the group was not limited to discussing traditional cataloging as the only means of providing bibliographic access. The group consensus was that having one entry point for users to search for library resources was desirable and, at this point, the library catalog was still the best single entry point. However, products were being developed, even by III, that would soon allow for searching across multiple platforms simultaneously. The group concluded that providing public bibliographic access more than one way was a luxury that this library could ill afford, given the large number of collections that had no access. There was some discussion of the desirability of common data elements for different bibliographic databases, with Chadwell and Hixson speaking out in favor of such an approach.

Based on the group's discussions, Stave decided to move two of his collections from high to medium priority. He noted that while they were high priority within the Document Center, in the librarywide context they were more of a medium priority.

Teague raised the issue of collaboration based on commonalities, noting that a number of his collections could be considered to be of greater importance if they were linked with other collections in Special Collections.

After some discussion, the group agreed that its earlier work in ranking the high-priority collections did not need to be revisited and the rankings could stand.

Decisions

The group reached consensus on a number of issues and decided the following:

- in the rankings, sort the collections into two groups and approach each group separately,

with those requiring item-level access being in one group and those needing only collection-level access being in another

- on the ranking sheets, include the number of items in the collection and the estimated number of hours needed to provide bibliographic access
- in the collection-level group, give higher priority to records that could act as portals to existing databases
- when a set of rankings is finalized, one collection from the Document Center and one collection from Special Collections will be worked on simultaneously. If bibliographic access to a collection from one area is completed while work to provide access is still going on for the collection in the other area, work will begin on the next highest ranked collection in the area whose collection was completed first. In this way, work should always be going on for both major areas

Next steps

The top two collections out of the high-priority group (one from each area) are the [American state papers](#) for the Document Center and the [Burgess collection](#) for Special Collections. Paynter asked Hixson if teams were going to be established within cataloging to focus on the top priority collections. Hixson noted that the Catalog Dept. was down two professional positions and there were not enough people to be able to establish teams who would work on one of the collections exclusively; work on the collections would have to be added on to ongoing work for new materials, retrospective conversion, and other projects already in the pipeline.

The next meeting will be from 11-12 on February 21.

notes by Carol Hixson

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Collection Priorities Subgroup Meeting Minutes

February 21, 2002

Present: Mischa Buczkowski, Faye Chadwell, Carol Hixson, Tom Stave, Ed Teague

Absent: James Fox, Robin Paynter

Rankings

Hixson handed out a sheet with the ranking criteria that included definitions for the point values. The group discussed the point values within each criterion and the significance of each one. There was considerable discussion about whether **staffing size** and **availability of records** should be retained as criteria or only be provided as information. Chadwell suggested that once the group set priorities, it was really the province of the Catalog Dept. to decide how and when to get the project accomplished. Hixson agreed that this was true in a practical sense but was concerned that not including those factors in the overall setting of priorities might make it seem that the responsibility for making the collections accessible rested exclusively with the Catalog Dept., rather than with the library as a whole. After some more discussion, the group decided to retain them as criteria but to give them a lower significance.

The group then discussed the relative significance of each criterion. Research interest or demand was considered the most significant and was given a .5 significance ranking. Current bib access was rated .25 in significance, ability to provide physical access was given .15. Staffing and record availability were each given .05 (see [the criteria sheet](#)). The significance factor is used to multiply against the original point value assigned in a category. A raw point value of 5 in **research interest** would become 2.5 after being multiplied by the .5 significance factor for that criterion. Hixson said she would redo the rankings already arrived at using the new significance factor (see [the revised chart](#))

Hixson voiced the hope that the ranking criteria would stabilize at some point. In support of that, she would like the group to decide over email in the next two weeks if it was satisfied with the ranking criteria.

Next meeting

The next meeting will be from 11-12, March 7. The agenda will be to continue ranking the collections.

notes by Carol Hixson

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Collection Priorities Subgroup Meeting Minutes

March 7, 2002

Present: *Mischa Buczkowski, Faye Chadwell, James Fox, Carol Hixson, Robin Paynter, Tom Stave*

Absent: *Ed Teague*

Ranking Criteria

The group agreed that the ranking criteria revised at the last meeting were acceptable. Fox stressed the importance of keeping a broad perspective when discussing research interest, to make sure that this was viewed beyond the individual site that housed the collection. He cited as an example AAA's interest in the Warner Collection. Even though the group felt that it had been taking this into account, everyone agreed that it would be useful to articulate this more clearly in our final written report.

Ranking Medium Priority Collections

The group skipped over the **AAA Terminal projects** until Ed Teague could be there.

In discussing the **Unprocessed gifts** it was noted that Acquisitions staff had made significant inroads in processing these and it was no longer necessary for the group to rank it.

Regarding the **Catalog Dept. book and serial backlogs**, it was decided that Boolean review files would be run to allow subject specialists to review the backlogs and select some items for high-priority cataloging. Chadwell and Hixson will work together on appropriate ways to sort the files and distribute lists to subject specialists for review. Those subject specialists who fail to review their lists will lose the opportunity for designating some materials as a high priority for cataloging. Chadwell will also be working with subject specialists to withdraw some of the titles from these backlogs.

Miscellaneous gifts were skipped over.

It was noted that Bob Felsing and Carol Hixson had requested and received special funding from Library Admin to deal with the **East Asian gifts**. With this funding, the Japanese cataloger, Michiyo Goble, is working an extra 10 hours a week to catalog the Japanese gifts, which form the

bulk of this collection of gift materials.

Canadian monographs were discussed and ranked to arrive at a total point value of 3.65 (after factoring in the significance rankings). It was felt that this collection might receive higher use if people were aware of some of the specific content. Many people would be drawn to some of the specific topics who might otherwise not think to use a Canadian document. Stave is going to break these up into different agency groupings and assign a high, medium or low priority to those groupings. Chadwell and Stave are also going to look at circulation for the already-cataloged Canadian monographs to see if this will help set priorities for the agencies.

The Census of India was discussed at length. After applying the rankings and significance factors, the total point value assigned to this collection was 3.1.

Stave noted that he had done some weeding on the **Council of Europe publications**. The group will take this into account when it meets the next time and continues on with the rankings.

The next meeting will be from 11-12 on March 21.

notes by Carol Hixson

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Collection Priorities Subgroup Meeting Minutes

April 26, 2002

Present: *Mischa Buczkowski, Faye Chadwell, Carol Hixson, Robin Paynter, Tom Stave*

Absent: *James Fox, Ed Teague*

Updates

The collection-level record for AAA Terminal Projects is being worked on.

Lists of items in the monographs backlog, sorted by fund code, have been distributed to subject specialists. Some specialists have returned their lists, indicating which titles can be withdrawn and which should receive priority cataloging. The titles to be withdrawn have been dealt with. Next week, Catalog Dept. staff will begin to catalog titles marked as a high priority.

Daphne Wang has been working with the Document Center to develop the workplan for cataloging the Oregon local planning documents.

The American state papers collection has been cataloged.

Some of the collections identified by Special Collections as uncataloged collections turned out actually to be collections needing retrospective conversion. The item-level rankings chart has been updated to reflect that. Those collections will not be ranked by this group but are being left on the sheet to keep track of the work that will need to be done. The Burgess collection is one of these; retrocon work is ready to start.

The Document Center and the Catalog Dept. have agreed to an interim process for providing access to the general map collection. Brief records, created using a template, will be keyed directly into Janus. Hixson has worked with Andrew Nicholson and Tom Stave to review the data elements and to come up with a standardized list of subject terms to be used. Document Center staff and students will do the keying, using the information from a card file kept on the maps. Hixson is working on developing the template. The work should begin in May.

New additions to the list

The Rand reports, about 80-85 boxes received from the State Library, need to be added to the

survey. There is an abstract database covering titles back to the 60s that provides some access to these titles. Item-level records are desired, with a classed-together number being assigned. The items will go into the general stacks. The priority group will be MEDIUM. The exact title count and physical condition of the items are not yet known. The time range is roughly from 1970-1990. It is expected that there will be many records in OCLC.

Aggregators and sets

Chadwell raised the issue of cataloging records for titles in aggregator databases where the vendor makes records available - should these be in our survey? Ebsco records have been available for some time and some have been loaded successfully into Janus. However, the issue of our single-record policy for print and electronic journals and the need to de-dupe the records, as well as the need to add certain Orbis-required fields, has made adding all of these records problematic. Filling of the CMET position should make this considerably easier. Chadwell recommended that these be considered a low priority until the final decision is made about whether to keep Ebsco as a vendor.

ProQuest supposedly is making records available for its database and the titles in that database could be added to the survey.

Stave wondered how microform sets that had records available would fit into the survey. The group thought that those collections should be added to the survey.

Locally-produced collections

E-Asia needs to be added to the list of uncataloged collections. Hixson reported that cataloging these titles had been discussed in the Digital Library Group as a mechanism for increasing the value of the collection if the Libraries decide to market it. The group thought it should initially be put into the medium-priority section, noting that it would become a high priority if the decision were made to market the collection.

The group thought it might also be a good idea to add Richard Bear's Renaissance Editions (available at: <http://darkwing.uoregon.edu/%7Erbear/ren.htm>) to the list. The Web site has been cataloged but the individual titles still need to be cataloged. The group also discussed ways to get the Library to support archiving the site.

Rankings

The group continued ranking the collections in the medium-priority group.

Council of European publications was ranked 3.75.

International Court of Justice collection was ranked 4, as was the collection of titles from its predecessor, the **Permanent Court of International Justice**.

Other

Chadwell suggested that a notice be added to the Library's What's New Page when a collection had been completed. The group agreed that this was a good idea.

Meeting time

The group discussed some possible new meeting times and reconfirmed the desire to meet twice a month. Hixson will send out the possible meeting times to the whole group for a decision.

notes by Carol Hixson

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Collection Priorities Subgroup Meeting Minutes

May 13, 2002

Present: *Mischa Buczkowski, Faye Chadwell, Carol Hixson, Robin Paynter, Tom Stave, Ed Teague*

Absent: *James Fox*

Rankings

The group continued with the rankings of the item-level collections. What remains to be ranked are the Special Collections materials and the collections just added to the list at the previous meeting. Progress has been made on a number of collections. The revised rankings sheet with updated information on the status of the collections can be viewed on the Web at:

<http://darkwing.uoregon.edu/~chixson/access/itemrankingsrev2.xls>

The next meeting will be May 27 from 2:00-3:30.

notes by Carol Hixson

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Metadata and Digital Library Services

CORE DATA ELEMENTS SUBGROUP

of the Access to Collections Library Initiative

BACKGROUND

All metadata schemes have developed a means of describing the content of different fields of information. Regardless of the terminology employed or the particular emphasis of a specific scheme, there is a great deal of overlap between the actual data elements. The Access to Collections Group of the UO Library believes that all Library materials share enough common characteristics, regardless of their physical format, to provide a foundation for a shared approach to basic bibliographic access: the systematic description and analysis of library materials to enable people to find, select, and retrieve (physically or virtually) those same materials.

CHARGE

The Access to Collections Group charges the Core Data Elements Group to:

Look at MARC, Dublin Core, VRA Core and other metadata schemes as models and identify the data elements that would be considered necessary or useful for providing access to Library materials, regardless of the form of the access (online catalog record, locally-produced database, Web list, finding aid, etc.) or the form of the materials (books, journals, microforms, manuscripts, photos, slides, videos, etc.)

Recommend a set of core data elements that should be included in any Library-sponsored bibliographic access project

Recommend a set of optional data elements that might be included in Library-sponsored bibliographic access projects, with the understanding that the list will not be comprehensive and that other data elements may be added for specialized needs

TIME FRAME

Have a [written report](#) to the Access to Collections Group by May 31, 2001

[Back to Access to Collections Page](#)

[Back to Metadata and Digital Library Services Homepage](#)

<http://libweb.uoregon.edu/~catdept/new/coredata.html>

Last revision: February 27, 2004 by Carol Hixson

Created by Carol Hixson chixson@darkwing.uoregon.edu, University of Oregon Libraries

Knight Library

Physical Access and Retrieval Subgroup

of the Access to Collections Library Task Force

Collection Representation:

- AAA/VRC/PARC: Erik Dahl
- Documents/Microforms: Richard Bear
- Knight General Stacks: Shelia Stigall
- Knight Reference: Paul Frantz
- Law: Mary Clayton
- Music and Douglass: Terry McQuilkin
- Science/Math/OIMB: Lara Nesselroad
- Special Collections: Will Harmon
- Knight Circulation: Laura Willey
- Group Facilitator: Shirien Chappell

Meetings: Lois Reed Room, 2-3:30p

- [011113](#)
- 011106 --Circ Supv meeting
- 011030 No meeting
- [011023](#)
- [011016](#)
- [011009](#) meeting of [\(CircSupv\)](#) -- Rowe)
- 010925 No meeting: too busy
- [010918](#)
- 010911 (canceled)
- 010904: No meeting. Circ Sup Conf)
- [010830](#) 9-11a
- [010821](#)
- [010814](#)
- [010731](#)

Documents:

- [Access to Collections Initiative](#)
- [Collection Survey](#)
- [Can't find it?](#)
- [Query of other Institutions](#)
- [Finding the Shelf](#)
- [Finding the Book](#)
- [Closed Stacks](#)
- [Standards](#)
- Brainstorming:
 - [Real Possibilities](#)
 - [Original List](#)
- [Publications/presentations, etc.](#)
- [CPS unit self analysis](#)
- [Loan Periods](#)

[Tasks](#)[Final Report](#)

Charge and Background:

In July, 2001, Carol Hixson, chair of the Library Initiative on Access to Collections, formed a subgroup and instructed the chair to investigate further the issues of physical access and retrieval for the Library's collections. The group is charged specifically to review the results of the survey on physical access that the Access Group collected some months ago, and determine if there is an existing problem with physical access and, if there is, explore methods of resolving it

We are to report our findings and recommendations to her. As chair, my goal is to complete this task by fall term, 2001.



Access Group Meeting Notes October 30, 2000

The first meeting of the Access Group met from 10:00-11:40 on Monday, October 30.

Present: Carol Hixson (facilitator), Lara Nesselroad, Lori Robare, Lonni Sexton, Shelia Stigall, Susan Storch.

Business items:

Minute taking: It was agreed that taking of minutes would rotate among all members. Hixson agreed to do the first minutes. Responsibility for minutes will rotate alphabetically by last name. Minutes should be done in Word within a week of the meeting.

Web site: Sexton volunteered to be the group's Web coordinator. This means that she will post minutes and other documents drafted by the group to a centrally-maintained site, but not that she will be responsible for writing the documents herself. It was decided to use the Catalog Dept. Web site as the home for the group. The URL for the site will be given to Library Administration for centralized linking.

Meeting schedule: The group decided that it needed to meet once a week for at least a month to get started. Mondays at 10:00 was chosen as the time for the first set of meetings. Locations of meetings may change.

Review of charge: 3 areas

The group began by discussing the first of the three parts of the charge, breaking it down into three sections and discussing issues to be addressed under each of the sections:

Review the condition of the open and closed stacks in the different libraries to determine the effectiveness of retrieval, the physical condition of materials, and turnaround times for shelving; work with the responsible units or departments to set guidelines or standards for all of the above

Effectiveness of retrieval: issues

- Develop sub-groups to carry out reviews. Need to go to various units and get volunteers
- How do you gauge effectiveness of retrieval in a project like this? Are there models to be used? Do we assume that having materials in correct call number order guarantees effective retrieval?
 - We keep certain statistics on searches for items and circulation that

might be helpful. Knight needs 3000 hours of shelf reading a year and averages about 600.

- We need to keep in mind that these things are handled differently in the branches so we can't assume that the statistics gathered mean the same thing. We need to document what is different about different collections. Special Collections has some very unique practices.
 - Who is keeping what statistics and where are they being reported?
- Issues about space and how things are arranged and the way that shelf order has evolved over time.
 - Issues about signage
 - Staffing and funding for staffing. Also, shelving and shelf reading are not the most glamorous jobs and it's sometimes hard to get people.
 - Issue of retrospective conversion and reclassification and its impact on this.
 - Collections that are in storage are another issue. How effective are the mechanisms for getting our hands on these items?
 - Inconsistent use of dummies throughout the system is an issue. Dummies versus Janus shelving location information.
 - Resistance of existing staff to change is another issue.
 - Juvenile collection and the multiple classification schemes (9 different schemes). Use of Juvenile Collection as a babysitter - collection gets heavy use and is very hard to maintain in order because of the different classification schemes.
 - Things off the shelf for repair or retrocon also affect effective retrieval.
 - Educational issues for patrons and staff. Are there ways to increase patron understanding of shelving? Training patrons not to reshelve their own materials. Need to require Library 101? Perhaps use Welcome message to new patrons in Janus? Develop some sort of online tutorial? develop incentives to get people to sign up for tours or library instruction? Need to offer library tours other than at beginning of term.
 - Making shelving a librarywide priority particularly at heavy return times. Overcome perception that it's just a responsibility of Access Services and that it's demeaning, low-level work. Perhaps have a corps of staff from other departments trained and ready to step in and help out at these times.

Physical condition: issues

- Need to establish set of criteria for physical review.
- Issue of quotas for repair that the branches are limited to. They are only able to send over a small number of the actual number needing repair and have to maintain separate shelving and tracking mechanisms for the things they can't send over - or just put them back in the stacks. Knight has a mend shelf that they search as part of their normal search routines but they have no quota.
- Issue of tracking items needing repair.
- Setting priorities for what needs repair. Things that are circulating get attention first. Is this the way we want it to be?
- Funding and staffing to do the repair work needed.
- Is there some level of repair/conservation that can be done in the collections rather than in Preservation? On-site triage?
- How do we compare with what other libraries like us are doing?
- Retrocon is increasing the amount of repair work being done routinely.
- Need criteria to help shelvees identify items needing repair.
- Are there collections where climate control is inadequate? Where materials are in danger? Where shelving is inadequate?

- Do we need to give equal space to every single thing regardless of what it is?
- Collection development issues - what about maintaining an archival copy for Orbis?

Turnaround time: issues

- Journals in Knight is minimal: 24 hours or less at beginning of term, 48 hours in middle, longer at end of term.
- Access to sorting areas mitigates slower turnaround times during busy periods.
- Knight makes use of "recently returned" status to alert users to shelving delays and they change the time periods for those messages depending on the time of year. Branches don't use this as consistently or in the same way.
- Effect of different circulation policies between collections, branches, and for different kinds of materials.
- Knight Reference takes care of its own reshelving and it doesn't seem to be a problem.

Retrocon update

Hixson handed out a sheet updating the group on the status of retrospective conversion efforts and discussed how things were currently being handled in the Catalog Department.

Next meeting

The next meeting will be Monday, November 6 at 10:00 in the Midwest Conference Room in Knight. Agenda will pick up examining the second bullet of the group's charge.

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Access Group Meeting Notes

November 06, 2000

The Access Group met from 10:00-11:30 on Monday, November 06.

Present: Carol Hixson (facilitator), Lara Nesselroad, Lori Robare, Lonni Sexton, Shelia Stigall, Susan Storch.

Continuing to identify issues from charge:

Inventoring collections not yet under bibliographic control. Some discussion of what is meant by control: this means collections for which there is currently no access point or usable finding aid, as well as collections for which there is currently a non-Janus database or other finding aid. Discussion of EAD versus Marc. There might be other ways of describing things, and group will need to look at maybe some other metadata schemes to decide what is appropriate for collections, once identified.

What collections are there? The big ones seem to be in Special Collections, chiefly Archives, and some different sections of Government Documents. Mention was made of Tom Stave's inventory of his uncataloged collections, which is a good example of the kind of data the group might want, and which is quite thorough. Group members probably all need a copy. We weren't aware of other collections for which this kind of inventory has been done, although there may be some as there was a call for such some 3 years or so ago.

We will need to survey library departments for uncataloged collections, and will probably need to provide a survey instrument, preferably on the web, to facilitate receipt of written, rather than anecdotal, comments. One of the things we noted was that we would want to give examples not only of things like Tom's inventory, but also of smaller and maybe informal collections, such as items on permanent reserve which have effectively but not formally been donated to the library. We thought we might need to target specific people we are aware have uncataloged collections for their responses in addition to sending out a general call (Archives, Manuscripts, Special Collections, Documents, the branches, Music Services all came to mind). We also thought we probably will need to specify the consequence that failure to respond will cause unmentioned collections to go to the end of the priority list.

A list of questions:

1. What level of access do we want? Staff seeing the information is a different kind of access than public/patron viewing. For a discussion of different levels of access see: <http://libweb.uoregon.edu/~catdept/home/colleclvl2.html> For an example of a collection-level record, see: [.b29511501](#)
2. What kinds of collections--define a collection.

3. What about virtual collections, for instance when GPO stops sending physical materials, will we want to continue the same level of bibliographic control for the sake of continuity, or change our cataloging approach based on the different type of material. And, how does this relate to other virtual or non-print resources.
4. How will we manage staff time to perform inventories. Unless other collections besides Documents have created these inventories already, a large amount of staff time will be required. One comment was that it will be hard to know what level of detail we need in an inventory until we have an idea what we have; however, it will be hard to know what we have until an inventory is performed. Likely departments will not want to perform two inventories.
5. To what extent do we want to allow cataloging and access to be led by the wishes of the collections' curators? We thought probably that wishes would be taken into account but would not be the final say-it could go either way, with a particular curator wanting total cataloging and access that is too labor-intensive, or wanting no access more than the existing in-house database, for instance.
6. What about the sources of records? As we have more and more things from a variety of vendors, local control of data becomes more complex. Prime example: aggregator databases, such as those which have both indexing and full-text articles, often include journals which are not cataloged in our collection, and we are not able to keep up with the ongoing inclusion and exclusion of titles from those databases. EBSCO solves this by providing the information on a regular basis, but other vendors have not. If this resource is available through our portal, do we need bibliographic records for it?

Issues in setting priorities:

1. How quickly can we do this?
2. Should it be patron-driven?
3. Or curriculum-driven?
4. Based on collection strengths?
5. Or by location (e.g. all areas of Documents in one fell swoop).
6. Are there preservation issues, both in terms of items that need preservation help now as well as items which may become preservation issues if made more accessible?
7. Who gets to be the final authority? Us? One issue is that the point of having a committee on this is to take some of that authority out of cataloging, to make for a truer balance between priorities set within cataloging, and needs known to those outside the department.
8. Will we set priorities differently for collections for which there is an existing searching tool? See <http://libweb.uoregon.edu/govdocs/pppm.html>

Issues to developing a master plan:

1. How detailed do we make it?
2. What is a realistic time frame?
3. We probably need to address constraints within the plan in order to avoid lack of participation due to such constraints-for instance, we may need to address staffing issues, timing, etc. Want to make it easy to support and participate in.
4. We probably again also need to include a consequence: failure to participate means unnamed collection will not be included in plan.

Retrocon update:

1. Carol had asked subject specialists to tell her if they wanted to review their areas for withdrawing items and etc; no one but her, Lori, and one other wants to. This means we can set whatever priorities we want.

2. We could start with the F list under the assumption that if for instance 10% of the 300's have already circulated with no existing records there is likely a demand for that subject matter.
3. Besides Deweys, there also is Juvenile Collection and Oregon Collection to include.
4. We want to make the space make sense both in terms of allowing us to re-use areas where Deweys have been, and in terms of being easy for patrons to understand changes.
5. Are we reclassing Oregon Collection Deweys, or just cataloging/making machine-readable? Carol will check with James Fox on this, as we can see reasons for (easier cataloging system and more consistent) and against (shifting, relabelling).

Shifting implications for retrocon:

1. Are double runs acceptable? For how long? Clearly they are an interim solution.
2. We certainly can identify items reclassified with an item code in order to make it easier for staff and patrons to find them.
3. How can we make this easy? Since subject specialists did not cry out for priorities based on topic, it makes sense to set priorities based on what would be easiest for shifting and patron access.
4. Are there areas of the Knight collection now where it would be better or worse to start adding in reclassified Deweys? Do we keep space stats? (no, used to but stopped due to budget cuts)
5. Shelia has a clear preference: starting at one end and going to the other (of the Deweys) since this probably makes usable space more efficiently, and since it is easier for patrons to make sense of.

Notes by Lara Nesselroad

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Access Group Meeting Notes

November 13, 2000

The Access Group met from 9:30-10:30 on November 13.

Present: Carol Hixson (facilitator), Lara Nesselroad, Lori Robare, Lonni Sexton, Shelia Stigall, Susan Storch.

Separate task groups:

The group considered ways in which task groups could help us fulfill our charge. We began discussing each of the three areas in the charge to determine what information we need and how best to get it.

1. Review open end closed stacks for: effectiveness of retrieval

We need to know what data has been or is currently being collected in this area, such as number of items shelved, average turnaround time for shelving and repair/preservation, etc. Lara and Shelia will come up with a list of questions to ask department heads.

In order to set guidelines or standards, we need to understand what is essential for effective access. To gather information on what is known now, Lonni will examine the Program Review. We may need to survey our users, perhaps with a focus group. Lori will do a brief literature search on similar studies.

We need to address issues related to retrieval and access from closed stacks. Susan will provide information on these issues at the next meeting.

2. Inventory collections not yet under bibliographic control

We will design a questionnaire to gather information on uncataloged collections. Tom Stave's inventory for Documents can serve as a model and help us define the questions to ask. Carol will get copies to group members. The questionnaire will have a timeline (perhaps the end of the year). It will be important to present different options for bibliographic access. Carol will provide some information to begin this discussion next week.

For setting priorities, we will need broader input. We plan to come up with a comprehensive list of collections, summary of resources required for achieving bibliographic control, and recommendations for level of access. This document will be made available to all staff, and we will hold an open forum for discussion; based on this discussion, we will recommend a priority order for processing of collections.

For all areas of the charge, group members should think about other key people who need to be involved in some phase of our work.

We will meet again on Monday, November 20 at 10:00

Notes by Lori Robare

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Access Group Meeting Notes

November 20, 2000

Present: Carol Hixson (facilitator), Lara Nesselroad, Lori Robare, Lonni Sexton, Susan Storch

Reports on Action items:

Lara made a rough draft of statistics she knows are kept by various branches. These include time spent shelfreading, searches requested and found, and the number of users. Janus also keeps statistics on number of users. Lara brainstormed a list of other types of statistics that we might find useful, but she doesn't know if anyone is keeping these stats.

- We need to find out who is keeping statistics at each location.
- Reference and public services may keep statistics on their interventions with patrons. They may also steer patrons away from filling out searches and toward alternative resources.
- Preservation will have statistics on the number of books removed from stacks and their condition
- ILL will have statistics on their searches, successful and not.
- ORBIS may also have statistics on their successful/unsuccessful searches

Locations like Documents may have uncataloged collections that can only be accessed via their searching aids. They can circumvent the in-house searching process (which would throw off our statistics.)

Lara can come up with a list of questions to ask representatives in different locations about statistics. Carol reminded us to tell people we're not trying to standardize the statistics staff in different locations are keeping, we're just fact gathering.

Lonni reported on what she found in her examination of the Accreditation review (1996) and the Library's ten-year review (1998). Focus groups involving faculty are mentioned in the ten year review, but neither Deb Carver nor Sheila Gray can remember anything about them. Deb remembers one ARL patron satisfaction survey that was very general and not very useful.

Barbara Jenkins and her Marketing the Library group are going to do an ARL "LibQUAL" survey of patron satisfaction in March or April. We may find this useful.

Lori looked at surveys done by different libraries that are similar to what we want. There were a few on topics like shelfreading and access to collections, but none very helpful. She did find an ARL spec kit (#205) containing surveys that we might be able to adapt to our use.

Inventorying collections not yet under bibliographic control: Developing an instrument

We looked at Tom's chart of uncataloged collections in Documents and discussed how we could make it a prototype for a database of uncataloged collections. We'd like to have people submit their information electronically, preferably in a form compatible with Excel (some staff may already have information collected in different databases.)

These are some questions we'd like to add to the chart:

- Physical condition
- Preferred level of access (collection level, item level?)
- Priority (low, medium, high?)
- Special information required for collection (i.e., URLs, indexes, finding aids)

Timeline: If we finish the chart in December, can we expect staff to finish it by February? March? Susan will tell James Fox about the chart, because he will have many collections to inventory. Carol will ask Tom how long it took to collect his information.

Options for providing bibliographic access:

- In-house cataloging (Full, minimal, collection level)
- Vendor supplied records, perhaps from aggregators like Ebsco or Bell and Howell.
- In-house produced web lists by subject specialists. These may link to cataloging records or may be produced off of cataloging records.
- In-house databases: stand alone or electronically linked through website or cataloging.
- Finding aids: paper, electronic, EAD
- Search engines to specific collections: paper, electronic, EAD
- Inventories: paper, electronic, EAD

The Technical services self study stressed having a single point of access (Janus) as a goal. But this may be challenged by units desiring to provide finding aids and inventories on site. Problems anticipated:

- Turf: People won't want us sticking our noses into their collections.
- Some curators don't want the general public to know about some of their collections, because they can't provide the public access. (It is possible to suppress this information.)

Next meeting: Nov. 27. We should find a way to communicate our plans to others, so they will feel more inclined to participate. We will draft a position paper about what we think bibliographic access is, and what the options for providing it are.

Minutes submitted by Lonni Sexton, 11-20-2000

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Access Group Meeting Notes

December 1, 2000

The Access Group met from 1:00-2:30 on December 1.

Present: Carol Hixson (facilitator), Lara Nesselroad, Lori Robare, Lonni Sexton.

Inventory of uncataloged collections

Carol reported that she had asked Tom Stave how long it had taken him to fill out the uncataloged collections inventory he did for Documents nearly three years ago. He estimated that it took him from 25-50 hours, but indicated that some part of that was spent deciding on what data elements to include. He thought that if we provide a spreadsheet with data elements for people that it might take a little less time for others to complete a similar inventory of uncataloged collections in their areas. Carol also noted that she had been experimenting with setting up an Excel spreadsheet to facilitate the creation of such inventories but that she hadn't gotten very far yet.

Survey of library users

Carol reported on a discussion she had with Barbara Jenkins regarding the work of the Marketing Group and the survey they plan to conduct of library users. They plan to use the ARL LibQUAL+ survey and Carol handed out some sample questions from that survey. There is concern that the questions on the ARL survey may be so broad as to be meaningless. Jenkins indicated that the Library would be permitted to come up with five additional questions for the survey, as long as they fit within the format that has been used for the other questions. The Marketing Group will be soliciting input on additional questions from other Library groups and the Access Group will be able to make some suggestions for questions to be asked. Lonni suggested that our Group set up a subgroup with the Marketing Group to work on survey questions.

The group discussed campus guidelines about conducting surveys. It was noted that it is necessary to coordinate with or follow guidelines established by the Oregon Survey Research Laboratory. Lori noted that the Faculty Senate had had a somewhat negative experience working with OSRL when doing they did a survey earlier this year. However, we will need to look into the guidelines.

Some other alternatives for conducting surveys were discussed by the Group, including focus groups and small surveys handed out at service points. Our goal is to learn what aspects of access to collections library users are dissatisfied with and make improvements or issue recommendations for improvements. The Marketing Group may not have the same goal. If we cannot find a way to get the kind of information we need from users, we will have to rely on

anecdotal information gathered from Library staff at service points.

Action item: Lonni will look up the OSRL Website and see if there are guidelines available for conducting surveys.

Action item: Carol will propose to Barbara Jenkins a closer working relationship with the Marketing Group to see if we can incorporate our information needs into the upcoming Library survey.

Position paper on bibliographic access

Carol handed out a rough first draft of a position paper on bibliographic access that is to be made available to the Library before we request that people complete the uncataloged collections inventory. The Group approved of the general format: brief chunks of information presented following a series of questions. Links can be provided to more detailed information from certain parts of the document. The top-level document will be a maximum of three pages long with lots of white space so it's easy to read and absorb. The Group discussed whether we wanted to include any information about metadata in the position paper and it was decided that we would, in a general way. The goal of the position paper is twofold: to provide a context to help people prepare their uncataloged collections inventory and also to set the stage for broader discussions about the changing nature of bibliographic access. Lonni encouraged us to present some of our assertions in the paper (since that is the purpose of a position paper). Carol noted that one idea she wanted to get across was the idea of building partnerships for providing bibliographic access so that it was not seen as the exclusive purview of the Catalog Dept. The Group felt that we wanted to present the idea of having a single portal for accessing all types of bibliographic information. What is the role of Janus and how does it relate to other sources of bibliographic data? The idea of using Janus to generate other types of lists was discussed. Carol noted that numerous libraries, such as the University of Washington and UC San Diego, are already using the catalog to generate specialized lists on discrete Web pages. We need to explore those options, too.

Action item: Carol will continue to flesh out the top-level page for the next meeting. Lori will work on descriptions of Full and Minimal in-house cataloging. Others will tackle other topics that need to be fleshed out as we proceed.

Minutes submitted by Carol Hixson, December 1, 2000.

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Access Group Meeting Notes

December 11, 2000

Present: Carol, Lara, Lonni, Lori, Shelia

1. Document to orient folks:
 - a. Search engines and inventories: how are these different? A question was raised about which is which. Maybe it's (the one for archives, for instance) really both; Susan will know.
 - b. Does this document make sense to someone not on the committee? Shelia will go through it since she was absent during discussions leading to it, with an eye for things that wouldn't be clear.
 - c. Is there a right way? Lonni notes this is the last thing on the existing document, but it's really the "why" statement, so should move up top, making it more like a goal statement: We believe there is no one right way; however, we do believe there exists a guiding principle.
 - d. Lori notes the importance of mentioning a balance between flexibility and unity.
2. Handout on two existing types of subject lists at other schools. Carol gave us all some pages from UW and UCSD, says the UW one is better as an example.
3. Handout on explaining the different between "minimal" and "full" cataloging. Aimed at a mid-level audience. Discussion:
 - a. Lonni: maybe including the bottom part, about "core" level cataloging is confusing; maybe we should mention this is OCLC vocabulary.
 - b. Lori: one distinction that isn't clear here is that these records, even if minimal, are not intended to be temporary-they are different from brief bibs we create in order to have a record to fill out later.
 - c. Carol: maybe this should go in with the explanation of collection-level versus item-level cataloging, then some thing about that full/minimal/core cataloging.
 - d. Lonni: will item-level cataloging always have to conform to OCLC standards?
 - e. Carol: not necessarily, but this is the current standard we employ.
 - f. Carol: maybe a section on brief bibs. They are designed to provide temporary bibliographic control but are not in-house cataloging. This could be another section on the main page.
 - g. Lonni: if we are doing cooperative cataloging, then we have to adhere to some standards.
 - h. If we are not, then we might have freer rein to improvise what we want to do.
 - i. Carol: think we do want to mention core because we will be getting into it with subject specialists.
 - j. Lara and Shelia: How does all this relate to what we want on an inventory, or does it? Carol: of course, there will be some negotiation about cost and time. We maybe need

to say that of course full-level cataloging will involve more time and expense and hence will not be quick.

4. ORSL: Lonni found there is no statement on their page that says survey "must" come through them (good).
5. Stats-gathering. Notes are incorporated into amended draft.

Minutes submitted by Lara Nesselroad

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Access Group Meeting Notes

January 22, 2001

Present: Lara Nesselroad, Lori Robare, Lonni Sexton, Shelia Stigall, Susan Storch

Bibliographic access document

The group discussed the third draft of the document. Specific points:

- Susan suggested that three of the options-finding aids, search engines and inventories- could be combined into one paragraph. She will write something up.
- Section on on-the-fly records: add the final sentence from the brief bibs section here as well ("It is expected that such records will be replaced...")
- Lonni volunteered to look through all of the links in the document to see if they make sense in context.

Most of the discussion focused on the second recommendation in the last section, "Develop a set of core elements that all databases, [etc.]...will contain..." There were questions about what such elements would be: specific fields (title, author, etc.), specific elements common to various metadata schemes, general standards such as those used to "sign" web documents? While not trying to define the elements at this point, it did seem important to think about what shape these would take. Ideas included:

- Titles are important, whether real or invented
- Who is responsible, which provides a point of contact and can establish legitimacy of the information
- Indication of currency
- Does the library have it, and if so, how can I get it?

Statistics survey

Lara distributed notes from the 12/11 meeting and a revised draft of the statistics survey.

Next meeting

Regular Monday meeting time may not work next week because of candidate presentations.

notes by Lori Robare

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Access Group Meeting Notes

February 13, 2001

Present: Carol Hixson, Lara Nesselroad, Lori Robare, Lonni Sexton, Susan Storch

Bibliographic access document

The group discussed some more revisions to the document. Specific points:

Lonni had followed through on the links and found them all useful, except for the one about metadata. She searched for more useful sites for each of the metadata schemes explicitly mentioned in the document and created a separate [metadata page](#) which will be used as the link instead. Lori suggested that she also add a link for the VRA Core standards to her metadata page.

Carol noted the need for a paragraph explaining item-level bibliographic access and will write something up.

Susan had revised the wording and combined several categories under options for bibliographic access. She noted the suggestions that the group gave and will make some further revisions. She will provide greater detail about EAD as an adjunct document. The group acknowledged that there is a lot of overlap between some of the categories and Carol will add a sentence to that effect at the beginning of the section.

The group was satisfied with the final section of the document on "Is there a right way to provide bibliographic access?" The possibility of setting up a special group to come up core data elements for library databases and access projects was favorably received.

Statistics survey

The group reviewed the statistics survey that Lara had drafted and suggested some editorial changes. Lara will work on a revision this week. She recommended that we send the survey out either very soon or wait until Spring term because of the difficulty that public services units would have responding to the survey at other times.

Future meetings

The group will get back on a regular schedule, meeting every other Monday from 10:00 to 11:00 or 11:30. The next meeting will be February 26 at 10:00. Carol will send out a notice with agenda and location closer to the meeting time.

Minutes submitted by Carol Hixson



Access Group Meeting Notes

February 26, 2001

Survey

The shelf reading survey is ready to go but for a few editorial changes. It will be sent to Public Service Heads and a few others. Barbara Jenkins, Carol Goodyard, Shelia Stigall, Erik Dahl, Lara Nesselroad, Laura Willey, James Fox, Richard Bear (copy to Tom Stave), Leslie Bennet, Terry McQuilkin, Mary Clayton, Barbara Butler, Kathy Heerema, Andrew Howell, Susan Storch.

Bibliographic Access Document

This document is ready to go. Carol will do a final revision and post it.

Things still hanging:

- Core Data Elements Group. The group discussed possible membership in the group.
- Uncataloged Collections Survey. We have identified the elements, but we need a form, perhaps in Microsoft Access with an input form for all to fill out.
- Survey for Preservation/Repair

Core Competencies

A group should be established to investigate the problem of training staff and new patrons. There are certain "core competencies" that all staff should have in order to perform their jobs, as far as physical and bibliographic access to the Library's collections are concerned. Specifically there are things they should know about bibliographic and physical access to collections. The group could identify those skills and recommend ways to address this issue.

Minutes submitted by Susan Storch

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Access Group Meeting Notes

March 12, 2001

Present: Carol Hixson, Lara Nesselroad, Lori Robare, Lonni Sexton, Shelia Stigall

Shelf reading survey:

Some surveys have not yet been returned to us.

What do we want the responses to the survey to tell us?

- A sense of the condition of the stacks and how it affects peoples' ability to find things.
- What recommendations to make about establishing standards for improving access to collections.

Our survey is like a focus group in that it solicits peoples' judgments and anecdotes about providing services, rather than being based solely on statistics. We will have to go back to some individuals and ask more questions. We will see themes (and discrepancies) develop as we look at all of the responses together.

LibQual survey:

Carol talked to Barbara Jenkins about the LibQual survey her group is doing. Some of the questions will be useful to us.

Uncat Collections survey:

How do we want to proceed to get the Uncat Collections survey underway? We have already identified the data elements we want and the target group of people to survey. Shelia will experiment with different electronic forms for the survey itself. If possible, she'll present them at the next meeting, which may take place in the Reed Conference room.

Core Elements:

The Core Elements group will consist of Will Harmon and Ted Smith. Chris Sundt would like to work on it too, but she can only attend one meeting because of time constraints.

Core Competencies:

Should we consider taking up the issue of core competencies? This would mean the basic bibliographic skills that every library worker should have, whether they are a student, faculty or staff member. Both the Public Services and the Technical Services self-studies made

recommendations about core competencies. We should review those recommendations, and discuss them at our next meeting.

Action items:

- Carol will nag people about returning surveys
- Shelia will experiment with survey forms in Excell, Access and Word formats.
- Lonni will cruise the Internet looking for some forms she's seen that collate survey results automatically.
- Carol will get a copy of the LibQual survey questions and the Public Services self study. (She already has a copy of the Technical Services self study.)

The next meeting will take place at 10 am Monday, March 26; place to be announced.

Minutes submitted by Lonni Sexton

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Access Group Meeting Notes

March 26, 2001

Present: Carol Hixson, Lori Robare, Lonni Sexton, Shelia Stigall, Susan Storch

Uncat survey

Fourteen responses have been received so far to the Uncataloged Collections Survey. Carol had developed a spreadsheet and had plugged the survey responses in for easy discussion and comparison. Ed Teague has sent forward a number of very detailed responses for AAA; there are also a few from Documents, two from Access Services, and a few others. Special Collections has been invited specially to respond and Susan will make a special effort to get them to respond, since we know that many uncataloged collections are located in Special Collections and University Archives. What are the next steps?

- Solicit more responses from other units that haven't yet responded
- Follow up with contact people and ask specific questions when more information is needed
- Determine appropriate level of access and set priorities
- Develop master plan for all of Library's uncataloged/uncontrolled collections

Carol will contact some specific units, such as Knight Reference, about some collections that they may have that they haven't been considering as candidates for this effort. Part of the project involves changing people's mindset about what is possible and making it clear that there are a lot of options. While it isn't necessary to favor one particular option of bibliographic access over another, the Group does consider it important to move access to collections out of the realm of only existing in someone's mind. Whether it be a Web site or a bib record in the online catalog, users should be able to discover that materials exist and are available for use or consultation without having to ask an individual at a reference or service desk. It's also important to let collection curators know that, even if cataloging within the online catalog is the chosen method of access, various approaches can be considered, including teaching other staff to do some level of input into OCLC or the catalog and having Catalog Dept. staff go on-site to do the cataloging. A branch or service center need not lose physical control over the materials in order to have bibliographic control provided.

Lori, Lonni, and Carol will follow up with specific questions of the contact people, since this is their area of expertise. Carol will work with AAA, Lonni will work with Documents, and Lori will work with Access Services and the other miscellaneous areas. When more responses come in, they will divide this responsibility up further between them. Carol, Lonni, and Lori stayed after the other Group members left to discuss specific questions to be asked during the follow up

conversations.

Some ideas for how to set priorities were:

- work with the priorities the collection curators have already provided
- give higher priority to collection level records that can be handled more quickly
- consider giving higher priority to small collections that would be easy to complete
- consider what kind of access they already have to the materials
- consider whether the collection has staff available to help with providing access

Physical access survey

Carol suggested asking Lara and Shelia to handle the summary and any needed follow up of this survey. We hope to have at the end a summary of the major issues, an analysis of the current problems and successes, and a set of recommendations.

Some additional questions that we should probably ask the respondents of this survey are: how many new materials do you get in a given time period? and how many returns do you get in a given time period? Without having some hard numbers to go along with the other data, it will be hard to make specific recommendations. It might also be useful to know what other activities besides shelving and shelf reading those units are responsible for.

notes by Carol Hixson

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Access Group Meeting Notes

April 25, 2001

Present: Carol Hixson, Lara Nesselroad, Lori Robare, Lonni Sexton, Shelia Stigall, Susan Storch

Uncat collections survey

Lori reported on her follow-up discussions with the collection curators she had agreed to talk to.

- Test collection: Lori met with Shirien, Laura, Katy. This consists of standardized tests, most outdated. Katy wants to dump the whole collection. She is also ordering 4 or 5 new tests. There are extreme restrictions on access because of the nature of the materials. They think they'd like item-level records for 4 or 5 of the tests, but suppressed from public display. All they need are brief bibs onto which they can hang items.
- Public Information files: Lori met with Shirien and Laura. They discussed how the materials get there - a variety of ways. Laura will go through the materials, and assess their usefulness, search the catalog, work with CD to get retention decisions. It's written into state law that the materials will be available for use in Knight Reserves. The highest use materials are the faculty salaries and the accreditation reports. Some things will be discarded. Laura will let us know if there are things we need to deal with. Probably will be some amount of transfers to be done.
- FITT Center. Lori talked to Kathy Heerema. It's a strange collection, some books, some magazine subscriptions, lots of software manuals, videos for software use. They use the manuals a lot. They have an inventory which mixes together hardware, software, and library materials. They want some exposure but the audience is limited - undergrads are excluded. The group discussed options and felt that it would be better to create a record for the entire FITT Center.

Lonni reported on her discussions with collection curators.

- She talked to Tom Stave about the documents. The local Oregon planning documents are not the same ones being covered in the LSTA grant. Tom has a good handle on what he has and what needs to be done.
- Lonni also followed up on the microfilm collections. From her examination of the detailed finding aids that they have available, these are not unCATALOGED collections. Rather, they are cataloged collections that need to be retrospectively converted.

Carol reported that she has a meeting scheduled with Ed Teague to ask some follow-up

questions about the AAA materials. She will report to the group. (Note: the following was added after the meeting with Ed) Of the six collections so far reported on from AAA, most still require some discussions with other library or campus units before any bibliographic access can be provided.

- The Doyle Construction Photographs require some decisions between AAA and Special Collections on the housing of these materials. Ed still needs to determine possible instructional use which may necessitate keeping them in AAA.
- The Framed Art Collection, largely architectural drawings, are barely accessible now. They are stored in the Secure Area. Some of them have broken glass coverings and some require two people just to move them and look at them. AAA has plans to put some of them up on walls. They need to establish provenance before bib access proceeds. (It also raises the question of what we might do to provide access to the artwork around all the libraries.) Museums have been providing "bib" access to artwork for years, so there is lots of precedent and many of the issues we're facing have already been worked out by others or are being worked on now in the national arena.
- AAA terminal projects. This collection is probably the most ready for bib access and is AAA's highest priority. They would ideally like to have individual brief records in Janus and also see an advantage to having records in OCLC, for resource sharing. We discussed a project using AAA staff and Catalog Dept. staff to create brief records. These materials get consistent use. They add about 50 a year. Ed needs to find out if the AAA copy is the archival copy or if it's a service copy.
- AAA Drawings: student renderings. These are minimally used and there are issues to be resolved about the permanent location. In addition, the School has its own archives (called the Bailey Archives) which include the same type of materials for a later time period. AAA has no responsibility for the Bailey Archives but the significance of them is that there might be an expectation that AAA continue to house the older drawings to be close by to the Bailey Archives. No bib access can proceed until this is resolved.
- AAA Drawings: metal flat files: same issues as for Doyle. Wait until some issues resolved.

Teague will get some additional survey forms in and will also rank his collections for bib access, taking into account the complexity of the ownership and physical access issues before requesting bibliographic access.

Physical access survey

Carol handed out to the group two more survey forms she had received. The group discussed next steps. Lara and Shelia will work together over the month of May to do some follow-up questions to those who responded to the survey (how many new materials do they get in a given time period? how many returns do they get in a given time period?). They will also meet to prepare a draft summary of the major issues, give an analysis of current problems and successes, and make some recommendations.

Next steps Carol will input additional survey information into the spreadsheet. Lonni, Lori and Carol will meet June 6 to begin drawing up a master plan for handling the uncataloged collections.

The entire group will meet again June 11 to review drafts of the uncataloged collections master plan and the draft report about physical access from Shelia and Lara.

Jan Roberson and Carol Lenocker will be invited to the June 25 meeting to discuss a survey about physical prep and preservation issues, as they relate to access.

notes by Carol Hixson

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Access Group Meeting Notes

June 25, 2001

Present: Carol Hixson, Shelia Stigall, Lori Robare, Carol Lenocker, Lonni Sexton

Progress Reports: Physical Condition of Collections

Shelia Stigall gave a brief report on the work she and Lara Nesselroad are doing on the physical access survey. There is some concern about how to analyze the data, because the responses were not uniform.

Carol Hixson felt we could use some help from Access Services on this charge. Carol Lenocker and her people should also have input. How do we assess the physical condition of the stacks? What would be realistic, given our levels of staffing and resources?

One method of assessing the condition of stacks would be examining existing statistics. Access Services staff sort books as they are returned and route them for repair. The majority of books needing repair which are directed to Jan Roberson's team come from this source. Janus can supply the month by month statistics on books routed for repair; we can also see the Access Services annual report prepared by Laura Willey. The retrocon project also routes books for repair. Jan keeps those statistics.

In addition to using these statistics, it may be desirable to do sampling in the stacks. Periodicals, which do not circulate, would be missing from the circulation statistics. As far as anyone knows, no previous sampling of this nature has been done before, although it is worth asking Shirien Chapell about.

We decided to form a subgroup to set guidelines for assessment and repair of materials. Carol Lenocker will chair. Carol Hixson reminded us that more than one standard can be applied, depending on the material. In some cases, we are making content available to patrons; in others, the object may have intrinsic value.

There are also concerns about the physical environment the materials are housed in. For instance, the shelves in Knight stacks are slippery, and the book ends are the wrong size and don't function properly. Oversize books, because of space restraints, are not being shelved flat, as they ought to be.

Action items:

- Carol Lenocker will form a subgroup to work out guidelines for assessing material for preservation.

- Carol Lenocker and Shelia Stigall will look at preventative maintenance.
- Carol Lenocker and Carol Hixson will look at the types of conservation statistics that are already being kept.
- Lara Nesselroad will continue to study the anecdotal responses from the survey.

Review remaining collections needing retrocon

A lot of work has been done over the years to assess retrocon needs for the main stacks. We don't have data on the impact retrocon projects have on Access Services.

Oregon Collection holdings have been cataloged, if not converted. Special Collections is largely uncataloged.

Right now, there is some controversy over how the materials in the Juvenile and Curriculum collections will be classed and where they will be lodged. Some (all?) new receipts are being cataloged for the main stacks via Quick Cat, so the collections are being split.

Action items:

- Carol Hixson will talk to Duffy Knaus, Will Harmon, and James Fox to gather more information about Special Collections.
- Lori Robare will talk to Katy Lenn about the Juvenile and Curriculum collections.
- Carol Hixson will look at statistical data on how long it takes to do original cataloging.

Inventory collections that are not yet under bibliographic control

Carol Hixson added the most recent data received to the spread sheet. Some Special Collections issues cannot be pursued until a new archivist is hired.

Item-level cataloging has been requested for many of the collections in Special Collections. In order to plan for a cataloging project, we need to:

- Take samples and figure out what kind of cataloging is needed: Fastcat, regular copy cataloging, original. Once we know this, we can estimate the amount of time it will take to catalog the collection.
- Establish cataloging guidelines: Reach agreement with subject specialists about the kinds of entries and authority work needed.
- Establish conservation guidelines.

It may be possible to detail someone to work half time on a sampling project.

Action items:

- Carol Hixson will talk to James Fox to talk about specific cataloging requirements and set up a sampling project in Special Collections.

notes by Lonni Sexton



Access Group Meeting Notes

July 23, 2001

Present: Carol Hixson, Carol Lenocker, Shelia Stigall, Lara Nesselroad, Lonni Sexton

Today's meeting focused on timeframes for charges.

Physical access: Original timeframe for completion: winter-spring 2002.

Carol H. handed out a compilation of results from our survey of uncataloged collections.

The data in the compilation will help Shirien Steven's subgroup, which is investigating issues of physical access and retrieval, to decide if there are problems with access, and to suggest solutions. Shelia is in this subgroup; she can keep us posted.

Carol L. is forming a group to assess the physical condition of collections. Her timeframe for completion: September 2001.

Carol L. and Carol H. are looking at exhaustive statistics on preservation. They will create a synopsis of conservation and preservation work done as a percentage of the total collection for the current year. Timeframe for completion: September 2001.

Carol L. will also make a definitive timeline of how things move through Preservation.

Inventory collections: Original timeframe for completion: summer-fall 2001.

Lonni, Lori and Carol H. still need to meet to discuss the cataloging aspect of the survey, especially the column on "disposition". They will meet at 8:30, July 23.

Carol H. will meet with James Fox about taking samples and establishing cataloging guidelines for Special Collections materials.

Retrospective conversion: Original timeframe for completion: summer-fall 2001.

Next meeting, Lori will report on her discussion with Katy Lenn about retrospective conversion options for the Juvenile Collection and the Curriculum Collection.

Carol H. will talk about Oregon Collection issues with James Fox. She has already talked with Duffy Knaus.

Carol H. will do an estimate of how long it takes to do original cataloging for retrospective conversion.

Preventative maintenance

Carol L. and Shelia passed out a handout, Preventative maintenance for Book Preservation, which outlined the problems they had identified in the stacks, and suggestions for their solutions. The group acknowledged that many of the solutions were currently beyond the library's grasp.

Normandy might have some suggestions for dealing with some of these problems, for instance, slippery shelves and mismatched bookends. Carol L. will talk to her.

Because it is probable that other libraries have dealt with these problems, Shelia will look for spec kits.

Off-site storage is a possible solution to the oversize book problem, since it is improbable that we will find a place to store them flat in the library. Off-site storage could also alleviate problems with crowded shelves.

Lara, from experience, suggested that shifting books from one locale to another currently receives little support from people outside the unit doing the shifting. She suggests getting support ahead of time, and trying to get a budget line for the shift.

User education, both of staff and library patrons, would help many of the problems. This came up during the Public Services Self-Study. Laura Willey has been trying to set core competencies for physical access to materials and bibliographic access, for staff and patrons. There are videos available on the subject: Carol H. will look at what the Library of Congress and the Association for Research Libraries have available on the subject. Display cases and power point displays could be set up for patrons. We can also try to get more information about using library materials in the script that is used for library tours.

Minutes submitted by Lonni Sexton, 7-23-01

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Access Group Meeting Notes

October 3, 2001

Present: Carol Hixson, Lara Nesselroad, Lori Robare, Lonni Sexton, Shelia Stigall

Uncataloged collections update

Carol H. reported that the survey of uncataloged collections has been presented to Library Council and is available on the Web. Following Library Council approval, a subgroup has been formed to review the survey and set librarywide priorities for the provision of access to the collections. Current membership is: Carol Hixson and Faye Chadwell, co-chairs, Tom Stave, James Fox, Ed Teague and Mischa Buczkowski. One more member is being sought from Knight Reference. The first meeting of this new subgroup is October 19.

Library Council also accepted the recommendation to provide collection-level cataloging to the large collections as an interim measure, until item-level access can be achieved. Catalog Dept. staff have begun to work on this.

Physical processing subgroup

The group reviewed a document that Carol Lenocker had prepared outlining access issues for materials that are in the Materials Processing and Conservation Unit of the Catalog Dept. The explanations provided were good and will be very useful in helping people to track down materials.

The group also provided several recommendations to improve turnaround time and tracking. There was some discussion and Carol L. will need to clarify a few points. It was decided that it would be best if Carol L. attended a circulation supervisors' meeting to review the subgroup's recommendations with them. After getting that feedback, the subgroup can provide revised recommendations that will form part of the Access Group's final report. Shelia will contact Shirien and Carol H. will contact Carol L. to get this set up.

Physical access and retrieval subgroup

Shelia had shared the internal Web site for the subgroup with everyone before the meeting, suggesting that everyone review the [brainstorming issues](#). Shelia explained that the subgroup is currently working its way through the brainstorming ideas, rejecting some, refining others. There was strong support among members of the Access Group for the idea of calling upon all staff to assist with shelfreading with some regularity.

What remains to be done?

Carol reviewed some action items from previous minutes to see what items still needed work. It looks as if only Carol L. and Carol H. have some followup work to do, in addition to the work to be done by the three subgroups. The action items are:

- Both Carols need to come up with a percentage of the amount of the total collections that undergo repair and preservation treatment in a year. They'll refer to statistics that are collected in MPCU and elsewhere to do this.
- Carol L. needs to come up with a definitive timeline for how materials move through MPCU.
- Carol H. has to follow up on revising the document on "Preventative Maintenance for Book Preservation" that Carol L. and Shelia had presented earlier.

notes by Carol Hixson

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