

To: Deb Carver, University Librarian
From: Carol Hixson, Facilitator, Access to Collections Initiative
Subj: Final Report of the Access to Collections Initiative
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The **Access to Collections Initiative** group consisted of Carol Hixson, facilitator, Carol Lenocker, Lara Nesselroad, Lori Robare, Lonni Sexton, Shelia Stigall, and Susan Storch (served 10/00-6/01). The charge was 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

The group began meeting in October 2000 and had its final meeting on May 24, 2002. It was quickly determined in the first meetings that retrospective conversion was well underway, with plans for the Catalog Department to work simultaneously on retrospectively converting materials in the Knight general stacks, as well as in Special Collections, consulting with collection curators, subject specialists, and Access Services staff to set priorities in each area. Throughout the tenure of the Access to Collections group, Hixson provided periodic updates on retrospective conversion and established a Web site where progress of retrospective conversion efforts could be tracked (<http://libweb.uoregon.edu/~catdept/home/retrofolder.html>).

The Access to Collections group identified issues affecting physical and bibliographic access for the remaining collections. Turnaround time for materials needing repair was identified by the group as an issue affecting physical access. A **Physical Condition Subgroup**, facilitated by Carol Lenocker and including Dotti Clegg, Marilyn Mohr, and Audrey Lee, met from August through October of 2001 and identified several problem areas in the Libraries' physical processing of materials that hindered access. In consultation with service units in Knight and the branches, they took steps to revise workflows and shorten turnaround times to resolve these problems.

To prepare the Libraries for a survey of uncataloged collections, the group prepared an overview document on bibliographic access options (<http://libweb.uoregon.edu/~catdept/new/bibaccess4.html>) which it made available to the entire staff for review and discussion. It then devised a Web survey form (<http://libweb.uoregon.edu/~catdept/new/uncatsurvey.html>) and gave collection curators until May 29, 2001 to respond to the survey. The survey results were collected and made available to the Libraries via the Access to Collections Web site at <http://libweb.uoregon.edu/~catdept/home/accesstaskgroup.html> and discussed by Library Council in September 2001. As a result of that discussion, the timeline of the Access Group was extended and the Collection Priorities Subgroup was established. In addition, a small **Core Data Elements Subgroup**, led by Will Harmon, provided a list of core data elements (<http://libweb.uoregon.edu/~catdept/new/coredatadefinitions.doc>) that would be 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.)

The **Collection Priorities Subgroup**, facilitated jointly by Carol Hixson and Faye Chadwell, also included Mischa Buczkowski, James Fox, Robin Paynter, Tom Stave and Ed Teague. The group began meeting in

October 2001 and concluded its work at the beginning of July 2002. Using the surveys of uncataloged collections as the starting point, the group agreed upon criteria for ranking the collections. Point values and relative importance were assigned to the following criteria: Current bibliographic access, Research interest of the collection, Physical access and new service demands that might arise from providing bibliographic access, Staffing needed to make the collections accessible, and the Ready availability of bibliographic records. Rankings were agreed upon for the collections for which item-level access was requested and it was decided that the Catalog Department would simultaneously undertake one project for Special Collections and one for the Document Center. No rankings beyond the original High, Medium, and Low were undertaken for the collections for which only collection-level access was requested; it was decided that the Catalog Department would create records for them in the order in which they were listed. Because of the number of photographic and manuscript collections that need to be made bibliographically accessible, the Catalog Department will need to coordinate extensively with the Division of Special Collections and University Archives in determining the order in which work on them is to be undertaken. The ranking sheets and the original survey forms are available on the group's web site at:

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

Because new collections are being added all the time, the group recommended that:

- a database be established to track new and existing uncataloged collections
- a Web input form be devised to allow anyone to enter basic information about new collections
- the Heads of the Catalog and Collection Development Departments be authorized to modify information in the database
- the Heads of the Catalog and Collection Development Departments consult with appropriate collection curators and subject specialists in ranking the newly-added collections
- the Head of the Catalog Department track progress on collections and update the database, at least quarterly, and
- the database be available for searching and review on the Libraries' intranet

The **Physical Access and Retrieval Subgroup** was formed to provide more in-depth focus on physical access issues. This group, facilitated by Shirien Chappel, also included Erik Dahl, Richard Bear, Shelia Stigall, Paul Frantz, Mary Clayton, Terry McQuilkin, Lara Nesselroad, Linda Long, and Laura Willey. Meeting from July through November 2001, they reviewed the issues regarding physical access to the Libraries' collections and prepared a detailed final report available on the Web at: <http://libweb.uoregon.edu/januscirc/collections/final.html>. They determined that patrons have problems getting access to physical materials in our collections only in part because the book may not be on the shelf. Much of the time, however, patrons can't find their materials because they don't understand our "library ways" of doing things:

- At the catalog, they don't know how to read the information.
- Once they're in the right building, they can't find their way around.
- Once they're at the right shelf, they can't find the book.

To resolve these problems, the group made a series of recommendations to change or demystify current practices (<http://libweb.uoregon.edu/januscirc/collections/recommendations.html>). For the times it seems impossible to modify current practices, they noted that the Libraries need to provide an accessible, approachable, and knowledgeable staff presence to make them understandable. They made recommendations regarding goals for turnaround time for re-shelving materials and for helping shelving units meet those goals. They also shared ideas for improving shelving productivity and accuracy. The group identified a number of problem areas and undertook to improve the environment whenever the solutions were under their control. Many of their recommendations have been at least partially implemented, such as the development of new explanatory pages linked to location label displays in the public catalog (called loclinker pages). While the pages, such as the one for materials in the AAA Library

(<http://128.223.84.43/screens/locating-orua.html>), have been developed, not all of them have yet been linked from the location labels in the catalog. Other recommendations require the involvement and approval of other units, such as the recommendation to establish information desks on the third and/or fourth floor of Knight Library.

Conclusions

The Access to Collections Initiative and its subgroups involved over 25 library staff from Cataloging, Collection Development, all of the branches, Special Collections, the Document Center, Knight Reference, and Access Services. Together, they outlined the problems, reviewed issues affecting physical and bibliographic access, and proposed and implemented many practical solutions. Turnaround times have been improved in physical processing and shelving, information about the Libraries' collections is provided to our users in a clearer fashion, "uncataloged" collections have been systematically surveyed so that the full extent of the challenge facing us is known, priorities have been set for providing bibliographic access to collections, and a methodology has been developed for the continued tracking and prioritization of collections. Perhaps one of the greatest accomplishments of the Initiative is the least tangible: stronger working relationships have been built across units in recognition of our shared mission and the groundwork has been laid for continued progress. While the Initiative itself has ended, the work of making the Libraries' collections findable and accessible to our users continues and is seen as a library-wide responsibility and priority.