Title Slide 1

Thank you for coming. I'd like to thank the American Association of Law Libraries for inviting me here to speak and especially Cynthia May for her work in making the connection and helping with the arrangements.

Title Slide 2

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

Slide 3

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

February 2000
- Traditional Catalog Dept (20 people):
o responsible for MARC/AACR2 cataloging, using LCSH, LCC
o database maintenance in III's ILS and related table work
o member of PCC: NACO, SACO, CONSER Enhance
o retrospective conversion being done only for items that circulated

Slide 4

Today, July 2006
- Metadata and Digital Library Services (30 people):
o responsible for all of above, plus

Slide 5

- creating and maintaining digital library collections, including preservation and public presentation
  - Scanning of images, text, etc. (OCR)
  - Descriptive and technical metadata
  - Running the software (CONTENTdm)
  - designing web sites and search interfaces
  - PR and instruction about collections

- running the campus institutional repository, including marketing and setting policies, software admin (DSpace) and upgrades, public pages
- digital and photographic reproductions of library materials
- exhibit services (assist faculty with projects, presentations, posters, etc.)
- microfilming (newspapers, theses, on demand reproductions)
- preservation and conservation of print materials
- traditional photography and darkroom work for library and campus publicity and publications
- reference, bibliographic instruction and collection development

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

Slide 6   Context in 2000
> 6 years ago the context:
> - o Great staff – would have been a lot more difficult with a different group
>   - well-trained, stable, long-term staff: professional and paraprofessional
>   - intelligent, hard-working, dedicated
>   - excellent interim leadership (Lori Robare)
> - Great colleagues – collegial, top notch
> - o PCC – NACO, SACO, CONSER Enhance
>   o Already doing quick cataloging in our Acquisitions department
>   o cleanest database I've ever seen thanks to Catalog Management and Enrichment Team (CMET)
>   o team-based (formats, languages)
>   o Library – ARL library without staff or resources to be that
> $800,000 budget deficit
> • My credentials (or why my catalogers trusted me)
>   o CC:DA
>   o CCS Exec
>   o PCC involvement from beginning (More, Better, Faster, Cheaper)
>   o 20+ years in cataloging – my mantras
>   o Cataloging must change
>   o Cataloging is a public service
>   o Timeliness is an essential component of quality (Brian Schottlaender referring to Sara Thomas' work starting the PCC)
>
> • 6 months into my tenure, new interim, then permanent, leadership of the library (Deb Carver)
>   o former AUL for Public Services
>   o energetic, ambitious (mountain climber – Mount Hood, trekking in Nepal
>   o started initiative process

     identify important issues and projects for library to pursue
     didn't want to maintain status quo
   o valued collaboration, risk taking

LEADERSHIP IS VERY IMPORTANT – SETTING THE TONE AT THE TOP

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

•Slide 7   Expansion and redefinition
 • Expansion and redefinition of traditional services – in stages; evolving vision; desire to get more done more quickly without loss of quality – improved efficiencies

Bullets on slide
- Expanded PCC (BIBCO, full CONSER)
- Retrospective conversion (10-year hiatus – 200,000 items)
  - o ˌ No additional staff or funding
- Manuscript cataloging
  - o Worked with Special Collections for a year
- Map cataloging
  - Worked with the Map Librarian – map cataloging workshop, Acq. And Cataloging staff
  - Collection-level cataloging (documents and special collections)
  - Increased productivity (114% between 99/00 and 02/03)
  - Vendor-supplied records (and standards for what we would do and not do)

Slide 8 – Expansion and redefinition
 • Started introducing new services and approaches - chronology
   Different levels of cataloging – not everything required fullest level (discussions dating from March 2000)

- EAD training for department head (April 2000) and several catalogers following year
- Dublin Core training started in 2002
- Non-library collections in library catalog (started May 2001)
- Non-catalogers supplying metadata – working with Special Collections and Document Center staff and librarians
- New ways to measure success (meeting in Council 2002, permission to have a floor of productivity below which we would not go.)

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

Slide 9   New skills

• Acquire new skills (myself and the department)
  - No longer have the same comfort level with our knowledge and expertise that we used to have – I'm starting over after 20 years
  - New metadata - Dublin Core, XML, TGM, etc.
  - New vocabularies (TGM I & II, FAST, local
  - New standards – NISO Z39.87, PREMIS, LAP of DC
  - Scanning of text and images (techniques, hardware/software, color application profiles, etc.)
In-house expertise, reading, trial and error

Slide 10   New orientation and focus

- Project orientation
- Commitment to continuing education
- Cross-functional initiatives and projects
- Outward focus -
I'm going to be talking about all of these in more detail in a few minutes.

Slide 11   Cross-functional initiatives

•Access to Collections
•Data for Local Communities
•Northwest Digital Archive
•Digital Library Initiative
•Metadata Implementation Group
•Institutional Repository Group
•Digital Content Coordinators

from 2000 until today, there have been a number of initiatives that have had a great impact on MDLS and the way we operate. I'll give you some background on more of

these and what skills they brought to us. The significant thing about all of these is that they involved librarians and staff from different departments and divisions within the library.

Slide 12   Access to Collection

- ˍcross-departmental (access services, branch library, university archives, etc.)
- ˍdefine access more broadly:
- • different levels (cataloger's judgment, full, minimal, collection, item)
- • different types (MARC, EAD, DC)
- • different providers (catalogers, documents, special collections, etc.)
- Uncataloged collections survey (never cataloged)
  - o   500,000 items needing item-level access
  - o   priority ranking undertaken (with CDA involvement)
  - library-wide effort, not just responsibility of catalogers
    - Working on uncataloged collections – project orientation
      - ˍlot of cross training between teams and units
      - ˍbreaking down traditional divisions of labor within the department
      - Teams are more like overlapping circles; much less proprietary; willing to tackle just about anything

(local area documents; children's books; archives inventory)

Slide 13   Data for Local Communities

o Data for Local Communities (LSTA grant)

The University of Oregon Libraries Document Center was the recipient of a two-year LSTA grant 2002-2004 to provide comprehensive access to Oregon local area data. The aim of the project was to serve the information needs of local government, community planners, researchers, and others needing free, ready access to local area data, by collecting in one location the best sources of current data on Oregon and its sub-state areas. The project has a searchable database that is created from specially-coded bibliographic records in the Summit catalog.

- Revolutionary use of bib records and use of the consortial catalog
- database populated by data from MARC records
- repurposing the catalog)

Slide 14   Northwest Digital Archive

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

Came out of attendance at EAD workshop in spring of 2000 by me, University Archivist at the time and Manuscripts Librarian, although grant ultimately written and coordinated by Oregon State

Slide 15   **Digital Library Initiative**

Digital Library Initiative, member (8/00-9/02)

- Decision to buy CONTENTdm
- Decision to build MSU
- two groups to come out of it (MIG, Software group – merged)
- advisory group that did nothing for a while
- Access to digital collections drafted by me

Slide 16   **Metadata Implementation Group**

chair (10/02 – ongoing)
started out working on one collection, defining data elements and mapping to DC
began testing of software with this same collection

Slide 17   **Picturing the Cayuse**
                    Moorhouse collection, grant, the Catalog Dept. staff stepped in- March 2003 – turning point
                        • Voluntary participation of department staff
                        • Four librarians (me, asst dept head, two new metadata librarians) worked up standards for this collection -

I'll get more into this in a bit

Slide 18   **IRG**
                    Institutional Repository Group – co-chair (1/03 – ongoing) Morphed into Steering Committee, which I coordinate
                        Expanded focus on scholarly communication
                        Brought dept out of the back room and into direct contact with faculty
                            • **another turning point in redefinition of department and in acquiring new skills**

Slide 19   **DCC**
                    Digital Content Coordinators, chair (7/04)
                        • Revamped group following my and Corey's attendance at Digital Preservation workshop held at Cornell in summer of 2004
                        • Working on becoming a trusted digital repository

All of these cross-functional, cross-divisional initiatives (and others that are underway now) have contributed to a new skill set – a large part of which is learning how to collaborate, share responsibility and credit, and live with ambiguity and uncertainty.

Slide 20   University of Oregon Libraries Digital Collections

In our work on digital collections, we are responsible for:
- scanning,
- metadata (technical and descriptive),
- running and updating the software,
- developing routines and procedures,
- developing and maintaining the public interfaces to the collections,
- doing bibliographic instruction,
- public outreach,
- grant writing and more

Slide 21   **Continuing education**

- New staff, new skill set
- Hired two new librarians with experience working with both MARC and non-MARC metadata and systems
- Hiring these people made the transition easier and faster
- Introduction to Dublin Core (training exercise on photographs)
- EAD workshops for me and other staff
- Introduction to scanning (Image Services expertise)
- Introduction to content analysis of images (Sara Shatford Layne)
- Revised approach to descriptive metadata
- This isn't MARC and it isn't AACR2
- We keep one step ahead of our staff; never enough time
- Our professional development informed department's evolution
  - PCC/SCT – continuing education (Jean Hirons/SCCTP; Ana Cristan) (99-02)
  - Bibliographic Control in the New Millennium (Nov. 2000)
  - Continuing Education Task Force (2002-2003)
  - Lori and my work developing training materials in LCSH, now LCC
  - Various readings and meetings attended
  - Corey's and my work with DCMI, Nathan's work with AV and archives community

Key is to bring experiences back, ask questions of staff, promote discussion

Slide 22   Continuing education

We have a page where we track continuing education opportunities and resources for the department, just recently started.

Slide 23   Digital Library Collections: Standards

This is one of the pages where we collect procedures and standards for our digital collections work. We have also incorporated these routines and more into our online department manual. This page is more for public consumption to inform others of what we're doing and why.

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

A lot of thought has gone into our approach to subject analysis of digital collections that is very specific to the way the software works, as well as our attempt to take users' needs and approaches into account. We have revised these guidelines multiple times. We've also revisited our approach to setting up personal and place names and have brought our work on our digital collections into greater alignment with our traditional cataloging practices because we found that it actually SAVED us time.

Key point: willing to try something and if it doesn't work, tweak it, redo it, or start over.

Slide 24   Poker Jim

This is an image from our first digital collection. I just want to show you an example of some of our work, especially the application of metadata on this first collection

Slide 25   Descriptive Metadata for Poker Jim Image

This shows the full complement of descriptive metadata for this image, both the metadata that my staff supplied and the metadata supplied by the tribes with whom we were working. Any field labeled TCI was from the tribes. You can see that we provided a lot of subject terms and also very dense descriptions. This was due to the nature of the project and also from our inexperience. We have become much sparser with our application of subject terms and descriptive notes now.

Slide 26   Technical Metadata for Poker Jim Image

This shows the technical metadata. Again, it is very dense. One of our newer librarians who was heavily steeped in metadata theory was fairly insistent about us taking this approach at the beginning. However, we were never able to keep up with this level of detail even for this first collection, much less for all the ones that have followed quickly on its heels. Reality has replaced theory in our application of technical metadata now.

Slide 27   Tour

We have developed a slideshow to highlight some of the items in our digital collections, just to give people a quick overview of the range of materials.

This is an example of the kind of technical metadata we were supplying.

Slide 28 through 52 (ends at Scholars' Bank)

I'm now going to talk about our current workflow and practices. As I do, I'll scroll through some images from our digital collections just to give you something interesting to look at.
Current workflow
 • No single workflow – each new project requires new workflow, with some common principles:
  o librarians do original MARC cataloging, answer questions from staff, train staff, and do project development and management
  o OAs do work in MPCU and ISC (as above) and project management
  o LT3 catalogers do original and high-level copy cataloging of new acquisitions, uncataloged backlogs, and retrospective conversion (monographs, serials, e-resources, all formats)
   Some LT3 cataloging being done outside of traditional cataloging teams (CMET, MPCU, ISC)
  o LT3s in all teams do low-level project management – work very independently
  o DBM, authority control, added copies/vols, transfers, withdrawals done in CMET
  o MPCU specializes in preservation and binding but staff there are also doing cataloging, retrocon, and digital collections work

Some staff have also received training working in the Beach
Conservation Lab

o ISC specializes in digital and photographic reproductions and serving
patrons directly (closely tied to Special Collections and ISC supervisor
continues to attend SpecColl meetings)

o digital collections work directed largely by me, head of CMET, and ISC
supervisor,

now have a new digital projects librarian position – for the first time, will
have someone focused entirely on digital projects. She is doing a review
of all of our collections, identifying inconsistencies in approach, cleaning
up and enhancing the public interface. This was one of three new positions
that the campus gave the library (following our proposals – the other two
were new positions for our Law Library – identified as our areas of most
critical need) The person in this position, Kate Ball, is bringing order and
consistency to our approach and public presentation. Having a person who
is devoted **exclusively** to digital collections has been essential and has
greatly improved our product. For the first time, we have a single person
who has the technical expertise, along with the appreciation of the
collections, who is able to provide the context and follow through and
make sure things get done.

o We also have a new, grant-funded .85 librarian position leading the
project to develop a collection of digital images from an analog collection
owned by the Oregon Arts Commission

LT2s and LT3s assigned work on different collections after they
volunteer for projects (some student support)
• work in CONTENTdm and DSpace
• trained by one of the 3 of us in metadata input and/or
digitization standards
- metadata review done by me and head of CMET, digital projects
librarian, and grant-funded position
- technical issues with software handled originally by head of
CMET, with assistance from Systems occasionally; I have now had
this revert to Systems (where it belongs), with occasional backup
from us – no single task in the library should depend upon a single
person
- we have developed guidelines for subject analysis of digital
collections, scanning, OCR, name headings, etc.
web development for digital collections done by me, CMET head,
and now digital projects librarian
we collaborate with other departments on development of digital
collections
- authority control routines being developed for digital collections
– trying to make it routine

o fly by the seat of our pants – need high degree of comfort with ambiguity and constantly shifting priorities

o it is a challenge to develop a stable infrastructure when new projects are being added all the time; we are constantly being asked to sign on to new grants and we have a hard time saying no to these potential partners. Grants are great but they take time to write the proposals and a great deal of time to set up and manage. The same people keep being tapped for grant participation and we are coming dangerously close to being committed more than 100% of our time on grant-funded projects alone.

Slide 52   Scholars' Bank

This deserves some special mention. In addition to me working now as the Coordinator of our institutional repository, I have brought my Head of Serials Cataloging, Mary Grenci, in as my administrative backup for this system. She helps me set up new communities and collections and review the work of our staff. I have split one LT2 position in half, with part of the work being in preservation and binding and one half-time position working exclusively on Scholars' Bank. We now have over 2500 items in SB – almost 2600. We have a backlog of materials waiting to be added with new people coming to us all the time wanting to have their materials added. The site receives almost 5 million hits a year, with files being opened over 30% of the time – which means that real people are accessing the site and looking at the materials. In digital terms, opening a file is equivalent to checking a book out of the library.

Slide 53   How did we get here?

How did we get here? Recap:
- o Gradual evolution
- o Working to acquire new skills (making time)
- o Taking on new work when asked
- o Seizing opportunities
- o Promoting a wider role for ourselves
- o Following through
- o Changing focus
- o Discussion of new ideas and trends
- o Flexibility

Slide 54   Successes

Successes
- • Lots of work getting done

o 114% increase in traditional cataloging productivity in past 3 years
o retrocon more than halfway done (had been stagnant for a decade)
o 7 digital collections publicly available using CONTENTdm (16,000+ items since April 2003)

‣ Setting policies and standards – not just a one-off, ad-hoc approach

o Institutional repository is up and running (765 items in it so far with several major collections getting ready to come on board)

‣ Expanded contacts with faculty, feeding discussions on scholarly communication
‣ Providing a forum for the archiving of student scholarship

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

Slide 55   Challenges
Challenges
- Learning and keeping up with everything we need to know is difficult
  o Competing standards and approaches; standards are changing constantly
  o New software systems

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

Communication - •Less contact with each other

- Big dept – common ground issue
- Professional staff very active but in widely disparate areas
- Recent findings
  - People feel left out of loop (they assume there IS a loop)
  - People wanting more guidance and at same time more opportunity for leadership role
- Strategies
  - New types of meetings (small groups, break up cliques), led by staff person
    - Provide questions to focus discussion
    - Recombine for group meetings
  - Make better use of list – require everyone to report on projects, meetings
  - Assign more people projects to manage
  - Staff must be part of solution – no whining, step up and do something
    - Continuing ed
    - Party boss
  - Key people must have backup for everything they do
  - Breaking down the power grid – asking some of more vocal people to sit quiet and let others talk more

Slide 56   Changing Environment

- Calhoun report, Marcum article, UCLA report, Joe Janes, Jim Neal, Joan Lippincott, etc. – references on the reference page in Scholars' Bank
- Use of digital collections compared to use of the catalog
- Reports questioning the value of academic libraries
- Major changes happening in reference and access services
- Started to frame discussion. Small-group meetings. Recap meeting – we've already given up too much!
- Reaction to LC series decision – prove it has worth!
- Guest speakers, others undergoing change
- Admin – opportunity costs

Making sure that people understand that everyone is in the same boat; it's not just our department

Slide 57   Future Directions

- Review copy cataloging and outsourcing again
- Re-examine depth of cataloging
  - proposed cost/benefit study of MARC records compared to metadata for digital collections
- Focus on access to hidden, unique collections
- Repurpose metadata
- Make connections
- Investigate other sources of digital content
  - outsourcing of some digitization
  - licensing or purchasing digital content
- More direct outreach to users

Slide 58-59 Repurpose metadata

Links from SB to canned searches of the catalog– Lippincott article

Slide 60   Repurpose Metadata

NC State catalog - Libraries are starting to make radical modifications to their online catalogues. This example from the catalogue at North Carolina State displays the results from a standard search in a very different way. It provides ways of drilling down or moving to related topics that doesn't involve scrolling through screen after screen of results. This represents a layer between their ILS and the web application of their OPAC.

While the underlying information (taken from MARC bibliographic records) is the same the new display is one way of expanding access to that information.

I'd like to see us at Oregon try something like this.

Slide 61   Make connections

Catalog digital collections and provide links to them – cross pollination

Slide 62-63 Make connections

UO Office of President and Scholars' Bank digital collection – student papers and digitized primary source materials – links between the two
 * Also the connection to the faculty and students; virtual and human connections; do more work directly with classes, as we can afford to

Slide 64   Make connections

OAISter and other external links, link up anyway and everyway we can. The open web is tremendously powerful and we can ride the wave

Slide 65   Other sources of digital content

Purchased, outsourced, licensed digital content all being explored. We can't do it all and we have to work with internal and external partners to get things done. We started out trying to do it all but the reality is that we can't keep pace with demand – we have to be willing to experiment with different approaches.

Slide 66-67   Issues and current projects

We try to keep a running list of active issues and current projects and provide links to all of them. We are directly involved in almost all of the major library initiatives. If you want your technical services (or any) of your staff to expand, let them out of their traditional boxes. If you're in a box, step out of it. You may have to work harder at first, but it's worth it.

Slide 68   Acknowledgements

I have many people whose efforts and contributions need to be specially acknowledged. First and foremost I need to acknowledge the support and initiative of our University Librarian.

Many people within my department, but especially my assistant dept head, Lori Robare without whom none of this would have been possible.

And many colleagues, within the library and on campus, just a few of whom are listed here because their contributions and support have been so important to our transition.

Slide 69   Contact information

The future is a lot less clear than it used to be. Lines are far less clearly drawn. My staff – and the whole library – has to be a lot more comfortable with ambiguity.

Change doesn't invalidate the past. It can liberate you, free you up to tackle new opportunities.

This transition isn't really that remarkable. Technical services staff and librarians have skill sets that are directly relevant to these new roles we've taken on:

- We have an understanding of metadata, without which the digital world would crumble
- We have an appreciation for standards and how they can enable sharing and collaboration
- We have experience designing workflows
- We are highly adaptable to our changing environment – look at the number of times we've changed systems
- We have good technical skills and an ability to figure out how to make things work
- We have experience training people with a wide variety of skill levels and documenting what we do, which can translate into providing direct user support
- We are results-oriented and our users want quick results with digital content
- We are tenacious
- We are good marketers; we've had to defend our jobs and our reason for being for a long time and that can be used in marketing new services, as well as old ones