

## Heads of Special Collections -- HOSC

Conference Call Minutes

May 14, 2012, 10:30 a.m.-12:00 p.m.

Attending: Christine Bunting (Santa Cruz), Lynda Claassen (San Diego), Melissa Conway (Riverside), Polina Ilieva (San Francisco), Tom Hyry (Los Angeles), Michelle Light (Irvine), Emily Lin (Merced), Daryl Morrison (Davis; Chair), David Seubert (Santa Barbara), Adrian Turner (CDL)

### Agenda

#### I. Aeon System HOSC interest and CDL planning (all and Adrian Turner).

There was general agreement that the Aeon System was of great interest, but cost was a major factor. The system would be a labor saving tool, enhance the user experience, make operations more scalable (for staffing), assist in expediting work flow, expedite reproduction requests, and assist us in gathering statistics. HOSC concluded that a proposal needs to be prepared, and presented to appropriate systemwide groups and CDL, for a systemwide consideration of the cost. Aeon was seen as a stable, sustainable company with significant success (1300 Iliad customers and the Aeon system has been adopted by Harvard, Ransom Center, Yale, and North Carolina). If all of the campuses adopt under CDL then CDL will support as a systemwide concern.

Adrian discussed deployment models. A brochure from Atlas Systems was circulated, describing different deployment options and considerations within a consortial context. Option 1 is where everyone shares a single instance. It doesn't allow for customization. It was considered as not as suitable for multiple campus use. Everyone would need to agree on the transaction level. Option 2, multiple instances, allows for more customization at the campus level. Option 2 seems the way to go. Campus sharing of a common user database -- which would require a standard patron record scheme -- would help to keep the licensing cost down. A common user database would also provide a more seamless user experience (a user would only need to register once, to interact with multiple U campuses).

There are two general considerations to a consortial license--1) licensing through a systemwide approach, to gain cost savings; and 2) systemwide deployment options (as described above), including server hosting approaches -- we'd want to explore costs for Aeon hosting vs. CDL hosting of the backend server/databases. The proposal needs to describe why we would want to have Aeon and the cost needs. Lynda commented that San Diego is ready to sign up with Aeon next year. Several will go to Scripps College to see their use of Aeon. Berkeley previously has expressed non-interest.

**Action:** Adrian, David, Melissa, Emily, and Tom were willing to work on the proposal (with some referrals to their working staff). Adrian and David were willing to co-lead the sub-group. Tom was willing to host the sub-group to meet in-person about this proposal. The sub-committee should get going as UCLA and San Diego are seriously considering contracting with Aeon.

#### II. POT 3 updates (Michelle Light, Adrian Turner)

There are several different Lightning Teams in POT 3. Lightning Team 1 has been looking at Archivist Toolkit to facilitate greater use. A draft will be circulated to HOSC soon. Two key recommendations are to form an Expert User Group across the campuses to share information and expertise, and also to have a "Train the Trainer" workshop series with a workshop in both

northern and southern California (to facilitate the formation of an Expert User Group).

Recommendations should be coming through CDC shortly. They will be looking for feedback from HOSC if they resonate with our needs.

Lightning Team 3 developed recommendations for a baseline descriptive record for collections described using archival control. It is basically an endorsement of the DACS' "single-level minimum" records. These particular recommendations will be situated within a broader spectrum of recommendations coming from POT 2.2, which will include recommendations for baseline bibliographic records. The draft will be circulated through HOPS, HOTS, and HOSC.

Michelle reported on Lightning Team 2 - Guidelines for MPLP now called "Efficient Processing" is going well. The team has outlined five possible processing levels ranging from a preliminary record (such as a MARC catalog record) to collection level record through minimal, moderate, and traditional approaches. There will be examples of the various approaches. A new Lightning Team 2.B. is focusing on evaluating ways to gather processing rates metrics. Audra Eagle Yun (UCI) will lead that team, with support from Adrian, and their recommendations will be folded into Lightning Team 2's forthcoming processing manual.

The goal is to present the Guidelines to HOSC by the end of June. Michelle would like to solicit comments from HOSC in July before submitting to other groups. Adrian commented on the POT 1 group, which is looking at a systemwide framework for Digital Assets Management. Adrian is on a particular POT 1 Lightning Team (1A) doing needs assessment on what a systemwide content management utility might look like. The team has been in contact with many of us as, as part of a series of interviews that they have been conducting with digital library program/initiative contacts at each UC campus library.

### **III. OAC Updates (Adrian Turner)**

**-Google Analytics and Collection Record Tool.** CDL is supporting Google Analytics for tracking use statistics of contributors' collections in OAC/Calisphere. Information was sent out on how to apply a Google Analytics tracking code. It was recommended we get started by June, so you can get your usage statistics for a full fiscal year starting July 1 for the fiscal year. Let them know if you need help.

**-Collection Record Tool/ "Record Express"**- this was just released and is available through contributor dashboard. You can use it to create a single-level minimal record description. It is also a vehicle to make accessible searchable PDF finding aids on OAC; you can attach one or more PDFs to a record created using the tool. It is a mechanism to expose finding aids that can't be encoded into EAD, but still make them accessible through OAC. This will lead to providing a framework to host PDF files. For the longer term, they are interested in supporting attaching of searchable PDFs to MARC21 and EAD records. If you have searchable PDF finding aids to link to and expose to OAC consider using Record Express.

-Follow-up on **OCLC Well-Intentioned Practice Document.** OCLC invited CDL to endorse the document. Adrian will recirculate the OCLC document for our review. Adrian will follow-up through e-mail to see if HOSC wishes to endorse.

**-Orbis Cascade Alliance Webinar** series to cover the basics of using the Archivist Toolkit. The Alliance has contracted with Adrian to cover some of the content. The space is now closed for others, but UC library affiliates can still get in till May 25 at the reduced rate of \$100. This is a good opportunity to jump start with Archivist Toolkit (before the NGTS POT 3 "Train the Trainer" programs are available, assuming those recommendations are approved and move forward).

### **IV. Calisphere Planning. (Catherine Mitchell, Director of CDL's Access & Publishing Group)**

CDL has combined Digital Special Collections Group and Publishing Group to think strategically about the platforms and look at their services. Catherine Mitchell and Sherri Berger have done several surveys to see who is using Calisphere, see the level of success and see how to improve the services. Three different methodologies were used: 1) a popup survey on the site asked users to identify themselves by categories. 2) Sherri was involved in research on statistics. 3) Catherine oversaw a contributor access survey to understand better how Calisphere could attend to needs or find new service opportunities.

Catherine reviewed the detailed findings of the three survey approaches. The Calisphere user types are much broader than initially expected going far beyond the K-12 audience. The lesson learned is that they should not get too focused on the needs of any one community group.

The research on usage indicates that there are often first time users. Most are accessing through Wikipedia, Google and key word searches. There is a significant group of "power users" especially archivists. The searches go to themed collections but also spread across many finding aids and digital objects. They need to make sure that wherever the user comes in they are aware of the full breadth of content. The home page is not necessarily the starting point for many users.

The contributor needs assessment survey looked at access needs for digital objects and perceptions and awareness of OAC and Calisphere services. The survey group focused on the UCs and two non-UC site visits. It was determined that if contributors had a robust local system for their digital images, OAC was seen as an added benefit, if the local system was not available, OAC was the primary access to the content. Discussed were barriers for contributors including resources for digitization, ingest concerns and the need for simpler workflows, turnaround was considered slow for "scan on demand" models.

The main points included:

- Calisphere's audience is broad and there is a need to broaden service to reflect that.
- Users come at content in many different ways and there is a need to contextualize and connect the content.
- Experiment with user tagging and the potential to allow people to create their own collections.
- Review value of curated subject content.
- Ingest needs to be improved. Need to find a way for local systems to make it easier to ingest.

CDL continues to address issues and hopes to report in six months that they have made improvements. Catherine Mitchell will make the full findings and recommendations available in a report to HOSC.

**V. Possible UC Manuscript Processing/Archivist Listserv (Daryl Morrison)** A UC Davis archivist suggested there be a UC listserv for archivists to share ideas and post questions and to get direct information from colleagues. Further recommendations could also come from the POT groups. HOSC members were open to the idea.

**Action:** Daryl to look into the idea further.

**VI. Campus Round Robin (All)** (Reported in order of last name of HOSC representative).

**Christine Bunting (Santa Cruz)**

The library was rededicated last week and it was a highly successful event. Hundreds of people came through Special Collections. The 1400 square foot exhibit area "Dead Central" was opened up with an exhibit from the Grateful Dead collection. They are continuing to work on general processing. They have been in the new facility since January and are bringing collections back from NRLF storage.

**Lynda Claassen (San Diego)**

UCSD got an NHPRC grant to digitize the Herman Baca Papers of a Chicano activist. They are using LUNA. UCSD is preparing an NEH planning grant to look at their audio on old technology. They are gearing up for their Library Reorganization that is being planned and developed over the summer. She hopes most of us will be at RBMS in the middle of June. We could have a HOSC meeting.

**Melissa Conway (Riverside)** they celebrated their 3 millionth book. Terry Belanger gave the keynote address it went very well with many faculty members in attendance. The University Librarian search is starting and Melissa was selected to be the librarian to serve on the committee. There will be a two day Science Fiction event. The first day will focus on Science Fiction in Southern California and a seminar on Philip K. Dick and the next day Vernon Vinge is one of the speakers. He is about to give them some of his digital archives. On June 8 they will have the Emmy award winning director Saul Landau speaking about his film "Fidel." He was one of the only people from the U.S. to have interviewed Fidel Castro during the height of the Cold War. They got an NFPF grant to have the film conserved and will be showing it. They had a book published by a professor in Latin American Studies using their Mexican Revolution photographs so they are planning an exhibition in October with the California Museum of Photography. The Science Fiction Collection Consortium is up and running and will have a meeting at RBMS.

**Polina Ilieva (San Francisco)** has been appointed the UCSF archivist since March. She opened an exhibit on books that used materials from Special Collections. They selected 25 books that used documents and photographs. Special Collections participated in the "Alumni weekend." Thirty five people attended the archives open house. They processed the papers of Michael Bishop. They conducted a survey of campus PDF publications. They transitioned collections to OAC Analytics.

**Tom Hyry (Los Angeles)** has been the head for two years. UCLA integrated five special collection departments into one unit. They are working on strategic planning. He will share the outcome with us. The Center for Primary Research and Training has a new staff member, Gillian Quayar, most recently from New York University. The new curatorial group has been working on Collection Development Policies. They are one of the best centers on Ethiopic manuscripts and there is an upcoming symposium. Gary Strong is retiring so they will be looking for a new University Librarian.

**Michelle Light (Irvine)** curated an exhibit on Project Ngoc, a student group that sent students to Vietnamese refugee camps. They gathered a lot of artwork. They had an opening event, there seemed to be interest in hosting a reunion of the project members with the idea of doing a group oral history and using it as a fundraiser for the Southeast Asian Archives. They have been busy trying to raise funds for Special Collections and Archives and they received a major donation. They are hopeful they will be able to hire a temporary archivist for two years. The donation was in recognition of the work that they have done in integrating Special Collections materials into the classroom. There will be a room as part of their library renovation for Special Collections classroom instruction.

**Emily Lin (Merced)** They recruited a Digital Curation Librarian who will start in July. She is working with their Office of Research to develop plans and policies for retention and long term preservation of research generated at Merced. They are waiting for the key appointment of a Provost position as the current Provost retires in June.

**Daryl Morrison (Davis)** announced the appointment of Mackenzie Smith as the new University Librarian beginning on June 1. With her experience at MIT, we hope to get new attention to technology projects. We just had the big Picnic Day celebration on campus which brings hundreds of people into the library and Special Collections. We also appointed a Shields Fellow,

a graduate student from the history department who will do work in Special Collections. Last year the Shields Fellow prepared an exhibit using our radical political pamphlets. This year's student might work on a project relating to ethnicity and migration.

**David Seubert (Santa Barbara)** Their building plan was delayed, as they couldn't get bonds because another library building was seismically deficient and so they couldn't get started without addressing that building. That has been solved and the regents approved the expansion of an eight-story building for seismic retrofitting. They will move a million books into storage and back again. Special Collections will move into the building groundbreaking is slated for April 2013. A new University Librarian began last summer. There are a number of unfilled positions. There are eight recruitments wrapping up since January and three more recruitments coming up: an AUL for Collections (his boss), the Head of Special Collections, and a metadata librarian position is now open. They have a new Audio Archivist. They are exploring options for a reformatting service for the other UC campuses. He will send out information to determine our interest in that service. The position is 80% grant funded and 20% library funded. The grant is extended 15 months to 2014. The grant was from the Library Congress to digitize the National Jukebox Programs and patron initiated requests.

## **VII. Next Meeting**

**Suggested for July 9, 2012 Monday at 10:00 a.m.**