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TO: NGTS Steering Committee

FROM: NGTS New Modes for Access Task Group

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RE: Interim Report

Based on information gathered by Team 3 in NGTS Phase 1, approximately 66,350 linear feet of special collections and archives materials are unprocessed in UC, and 5,545 linear feet are acquired within the system every year. Because these numbers are based solely on survey responses received, the actual figures could be higher. At current rates, it would take the libraries the next century, at minimum, to process and make available those materials. At the same time, we know that the amount of digital content generated is increasing by significant factors, as is the gap in the capacity and number of information professionals needed to manage this digital information. [i] Transformational change in the way we approach, organize, and provide access to special collections, archives, and digital formats is required if we are to meet the goals set out in the UC Library Collection Concept paper endorsed by the University Librarians.[ii]

In light of this reality and the growing expectations of end users that content be available online, easily discoverable, and relatively unfettered in terms of use, the New Modes for Access Task Group initially brainstormed six potential strategies:

1) Redefine benchmarks
Given that it is simply not sustainable to continue arranging and describing UC unique collections at current rates, how do we rethink the requirements we have used in approaching the processing, description, and conversion of unique materials?

2) Transform workflow
Almost every respondent of the Phase 1 survey of archives and special collections units expressed the need for more staff to dedicate to processing collections. The reality is that UC cannot hire new staff. Therefore, we must rethink how we

approach processing and staffing at the system level in order to deal with the growing backlog.

3) Digitize archives and special collections "en masse"

Users expect archives and special collections content to be made available online immediately upon acquisition. We anticipate transformations in how users discover and use scholarly information as more and more Google Books content is made available online. How might digitization on a large scale be applied to "leapfrog" access to unique and valued UC collections?

4) Automate

Given that the manual creation of finding aids and item level metadata do not allow us to effectively deal with our backlog or incoming accessions, can automation streamline or improve the efficiency of our procedures? Are there developments in computing that might be applied to how we describe, categorize, attach metadata, and process materials?

5) Apply metrics

Media companies and content publishers are utilizing user studies and web analytics to speedily identify the content interests and practices of web users; optimize placement in search engine results; and leverage popular distribution channels. What information should we be gathering about users and usage of content to help inform our decisions about collection priorities and processing approaches? What metrics should we be gathering about our approaches and how effective they are?

6) Employ crowdsourcing and crowdcasting

How might certain processes be "outsourced" to broader audiences online to improve efficiency and effectiveness? Can we leverage the interests and energies of online audiences to promote access to resources and improve their usefulness?

Draft Recommendations

After discussions online and in person, the group has decided to focus on outlining the following recommendations based on these initial areas of investigation that build upon and dovetail with some of the recommendations from the SOPAG DLSTF report:

> **A. Implement shared systemwide approaches to the efficient arrangement, description, and management of UC unique collections**
>
> The particular focus of this recommendation addresses the backlog of unprocessed special collections and archival material, using shared systemwide tactics. It encompasses benchmark and workflow recommendations, with the following goals: provide collection-level access for every collection; implement "More Product, Less Process" approaches to

arranging and describing collections; and coordinate use of an archival management system to manage data and streamline workflows.

B. Pursue large-scale digitization of special collections and archival materials

We intend to propose a pilot that will develop the criteria, workflow, sustainability, and application of new approaches such as automation. The establishment of digitization centers at select campuses throughout the UC system will be explored to determine feasibility and cost savings. All campuses have been surveyed to identify digitization capabilities and levels of expertise in handling different format types. This information will be used to inform recommendations about workflow.

C. Launch pilot projects to develop and test the application of new approaches such as crowdsourcing and crowdcasting.

New tactics need to be adopted to address problems in efficiently and effectively managing and disseminating information. We need to anticipate new technologies to find out what works and what does not using rapid development approaches.

Underpinning each of these strategies will be recommendations about the metrics that should be gathered and analyzed to inform decision-making and assess the effectiveness of what we are doing. To address our charge, the group will include analysis of costs and benefits in our articulation of these strategies, as well as recommendations about governance, resourcing, risk management, and communication.

We will be consulting with UC3 to determine to what extent UC3's planned services will support or address needs we have identified in managing digitized content as well as born-digital content. These identified needs and the work plans of UC3 will frame our recommendations on modes of organizing and providing access to born-digital material.

[i] IDC Go-to-Market Services. (2010). *The Digital Universe Decade – Are you Ready?* Retrieved from http://www.emc.com/collateral/demos/microsites/idc-digital-universe/iview.htm.
[ii] UC Libraries' Collection Development Committee. (2009). *The University of California Library Collection: Content for the 21st Century and Beyond.*