

NARRATIVE

On November 30, 2007, the Library of Congress released its draft “Report on the Future of Bibliographic Control” for public comment. The Working Group on the Future of Bibliographic Control was charged to “Present findings on how bibliographic control and other descriptive practices can effectively support management of and access to library materials in the evolving information and technology environment” and “Recommend ways in which the library community can collectively move toward achieving this vision.” The Working Group’s report provocatively begins:

The future of bibliographic control will be collaborative, decentralized, international in scope, and Web-based. Its realization will occur in cooperation with the private sector, and with the active collaboration of library users. Data will be gathered from multiple sources; change will happen quickly; and bibliographic control will be dynamic, not static. ... Libraries must continue the transition to this future without delay in order to retain their relevance as information providers.¹

“Bibliographic control” here does not simply mean traditional library cataloging, although that is clearly a core component. According to the Working Group, “Bibliographic control is increasingly a matter of managing relationships—among works, names, concepts, and object descriptions—across communities.” By managing these relationships, library catalogers, museum curators and registrars, archivists, records managers, and other metadata specialists can develop shareable metadata, metadata that retains meaning and utility outside the immediate context in which it was created.

In 2005, the Texas State Library and Archives Commission (TSLAC), along with 11 partners around the state, began an IMLS-funded project to provide access to collections of digitized material through a central federated search interface. While this project has been successful, it clearly demonstrates the need for sharable metadata. Of the 68 collections identified, 13 used simple Dublin Core metadata; 34 used customized variants of Dublin Core metadata; 5 used MARC and the AACR2 cataloging standard; 1 used EAD; 7 used entirely custom metadata; and 8 were static Web pages with no formal metadata at all at the beginning of the project. Metadata normalization and creation required far more time and resources than originally expected, and interoperability between metadata creation and asset management tools was almost non-existent.

In the current project, the Texas State Library and Archives Commission, working with the University of North Texas Libraries, Amigos Library Services, and a variety of additional partners and participants (see Attachment 4), will develop “Train to Share,” a project of the Texas Heritage Digitization Initiative (THDI). In this three-year project, THDI will address the need, identified nationally but equally evident at the local level, for quality sharable metadata, metadata produced within specific traditions of practice that can nonetheless be shared to create rich experiences for both today’s user and the user of tomorrow.

1. Assessment of Need

While not unique to Texas, the need for metadata training across institutions is increased by the sheer size of the state. According to the *Texas Almanac*, “Texas occupies about 7 percent of the total water and land area of the United States. Texas is as large as all of New England, New York, Pennsylvania, Ohio and North Carolina combined.”² It takes nearly 15 hours to drive from Brownsville in south Texas to

¹ Library of Congress Working Group on the Future of Bibliographic Control. “Report on the Future of Bibliographic Control” (Draft for Public Comment). November 30, 2007. Available at <http://www.loc.gov/bibliographic-future/news/draft-report.html>.

² Alvarez, Elizabeth Cruce and Robert Plocheck, editors. “Texas’ Natural Environment.” *Texas Almanac, 2008-2009*. Dallas, TX: Dallas Morning News. Available at <http://www.texasalmanac.com/environment/>

Amarillo in the Panhandle, and nearly 14 hours to drive from El Paso in far west Texas to Beaumont, near Louisiana.

Texas is also diverse, both ethnically and geographically. In a 2002 report, the Texas state demographer reported that “the diversification of Texas is the dominant demographic pattern impacting the State. Texas will become less than one-half Anglo in the next few years and is likely to have an Hispanic majority population by 2040 (with only one-third to one-quarter of the population being Anglo by 2040 and between 52 and 59 percent being Hispanic).”³ These Texans are geographically dispersed, although growth is increasingly centered in large urban areas and along the Texas/Mexico border. Frank de la Teja, Texas state historian and professor at Texas State University – San Marcos, writes that

More than 8 million Texans are of Hispanic origin, yet our schools largely ignore the two centuries Texas was under the rule of Spain and Mexico. Textbooks focus on the arrival of settlers from the United States, but, for many Texans, the heritage from south of the Rio Grande is one to which they can better relate. Additionally, numerous legal, economic and cultural practices of today's Texas have roots dating from the Spanish colonial period.⁴

Although underrepresented in textbooks and other materials, this diverse cultural heritage has been well documented by institutions across the state. Texas has more than 700 public, academic, and special libraries; over 600 museums of history, art, science, and natural history; and innumerable historical and genealogical societies, corporate and special archives, and other cultural heritage institutions. It is home to three ALA-accredited library schools (including the top-rated program for archival studies according to the 2006 *U.S. News & World Report* survey), at least two graduate-level museum studies programs, a graduate program in historic preservation, and several undergraduate and graduate public history programs; the largest state library association and one of the largest state associations of museums in the country; and a significant presence in the regional society of archivists.

A 2005 survey conducted by the Texas Heritage Digitization Initiative Training Work Group in 2005 illustrates the training needs of cultural heritage institutions in the state (see Attachment 1). 65.8% of respondents from libraries, archives, museums, and other institutions indicated that their institution was planning or discussing some sort of digitization project. 46.7% of the respondents indicated that their institution needed beginner-level technical training on metadata in order to provide access to digital resources. 57.5% needed beginner-level training in digital asset management systems, with a strong preference (61.7%) for Open Source Software. Training in grant writing and workflow analysis, both required for digital project management, were also needed.

Although training is clearly needed, respondents in this survey indicated that there is a shortage of resources when it comes to accessing training. A strong majority of respondents indicated that they would be willing to participate in half-day, full-day, or Web-based training – training that did not, in other words, require overnight travel. Similarly, 78.4% of respondents indicated that the location of training opportunities is “Always” or “Often” a determining factor in whether they can attend training, with 50 miles or less of travel being strongly preferred. Cost of training was also a factor, with \$100 being the maximum most respondents would be willing to pay for a one-day workshop. These results supported earlier focus group assessments conducted by the Texas Historical Records Advisory Board (Attachment 2). These focus groups revealed that “Custodians of records, particularly in smaller counties and cities, have difficulty traveling more than two hours to attend training and have virtually no funds to stay overnight or to pay high registration fees.”

³ Murdock, Steve, et al. “A Summary of *The Texas Challenge in the Twenty-First Century*: Implications of Population Change for the Future of Texas.” December 2002. Available at <http://txsdc.utsa.edu/download/pdf/TxChall2002Summary.pdf>

⁴ de la Teja, Frank. “Rethinking how Texas history is taught.” *Austin American Statesman*, November 4, 2007.

These results show that training within graduate-level programs of library and information science or museum studies programs is unlikely to meet the needs of the large numbers of librarians, archivists, and museum professionals contemplating digitization projects. National training institutes, such as the NEDCC “School for Scanning,” are also not options for the majority of Texas cultural heritage professionals. Training series like those developed for the Illinois Digitization Institute (<http://images.library.uiuc.edu/projects/IDI/Index.HTM>), which offered a combination of in-person and online workshops, are more attractive, but the costs of these training programs, which can be upwards of \$300 per person plus travel per day, are prohibitive.

A promising approach to metadata training has been in development by the Association for Library Collections and Technical Services (ALCTS), a unit of the American Library Association, in cooperation with the Library of Congress’ Cataloging and Distribution Service (CDS). The “Cataloging for the 21st Century” (<http://www.loc.gov/catworkshop/cat21/>) workshop series is intended to address the continuing education needs of library catalogers. The program has four components:

- Having content experts develop course materials that are made available at reasonable cost through the Library of Congress’s Cataloging Distribution Service.
- Providing train-the-trainer sessions to develop a cadre of experienced trainers.
- Working with and encouraging training providers to sponsor workshops using the course materials and the designated pool of trainers.
- Reviewing, evaluating, and revising course materials to make them more effective and keep them up-to-date. Trainers will also be assessed based on course evaluations.

The five courses in the “Cataloging for the 21st Century” program are intended to be independent and need not be taken in any particular order. The courses are “Rules and Tools for Cataloging Internet Resources,” “Metadata Standards and Applications,” “Principles of Controlled Vocabulary and Thesaurus Design,” “Metadata and Digital Library Development,” and “Digital Project Management Basics” (Attachment 3). Taken as a whole, they very nearly address all of the training needs identified in 2005 by the THDI Training Work Group.

In January 2007, Danielle Cunniff Plumer, THDI Coordinator, attended Instructor Development Seminar sessions for the “Metadata and Digital Library Development” and “Digital Project Management” courses to assess their suitability for large-scale adoption in Texas. The series offers the promise of sustainability, in that it is being maintained by the Library of Congress, and affordability, as course costs are low. However, the intended audience of the series, library catalogers, is too limited, as any workshop series in Texas must appeal to a wide range of cultural heritage professionals with varying degrees of formal training.

Discussions with museum professionals indicate that museum curators and registrars do not share a common vocabulary or tradition of practice with library catalogers. In particular, “title” and “author” elements, generally required in the bibliographic tradition of libraries, do not make sense for many natural and historical objects. “Date,” also, is used differently in museum practice than in libraries, as few objects can be definitively dated to a particular year. This presents a barrier to adoption of any metadata training program developed solely within the library community. In response, the Texas Heritage Digitization Initiative proposes to modify the “Cataloging for the 21st Century” program to expand its audience to include a broader range of metadata specialists. The Library of Congress has agreed to allow this modification, with the provision that any new or adapted courses developed by THDI be added back into the workshop series.

In particular, the “Rules and Tools for Cataloging Internet Resources” workshop, which assumes a fairly extensive knowledge of MARC and AACR2, will be modified to remove library-specific jargon and to incorporate other cataloging traditions. The “Metadata Standards and Applications” and “Principles of Controlled Vocabulary” workshops will be modified to discuss additional standards for content and syntax

not frequently used by library catalogers while also focusing more on best practices and techniques rather than theoretical knowledge or abstract models of cataloging. Modifications will be based on a focused needs assessment of metadata specialists, and all modified courses will be pilot-tested before being released into general production.

Our experiences in statewide projects like the TexShare consortium, Texas Archival Resources Online, and the Texas Heritage Digitization Initiative has convinced us that Texas institutions are capable of and willing to share resources and collaborate to best use the resources they have. This is vitally important, as Texas ranks 28th nationally in per capita income but is 48th in terms of per capita support for public libraries, with little identified public support for other cultural heritage institutions. Rapid population growth and low levels of local support intensify the pressure for archivists, librarians, and museum professionals to do more with less. The "Train to Share" proposal reflects an effort to give cultural heritage institutions the tools they need to make their resources available and usable online.

2. National Impact and Intended Results

In many ways, particularly our emphasis on collaboration with a range of partners from the cultural heritage sector, this project offers an opportunity to put the Library of Congress Working Group on the Future of Bibliographic Control's recommendations into practice. However, as many groups have recognized, it is extremely challenging for collaborative, distributed projects to develop metadata that can be easily shared and reused across organizational and professional boundaries. Carl Lagoze *et al.* in their 2006 assessment of the NSDL metadata aggregation project, state bluntly that "Few collections were willing or able to allocate sufficient human resources to provide quality metadata."⁵ They attribute this in part to the need for three distinct skills sets rarely all possessed by a project team, much less a single individual: domain expertise, metadata expertise, and technical expertise.

In their 2005 study of metadata aggregation as part of the IMLS Digital Collections and Content program at the University of Illinois at Urbana-Champaign, Sarah Shreeves *et al.* reported that "the majority of interviewees expressed concern with the consistency of their metadata" and note that varying local practices in metadata development "represent a very real and understandable tension between the need for standardized, accurate description of digital objects and description that meets the needs of end users."⁶ Local practice may be seen as a variant of domain expertise, as described by Lagoze *et al.*; in many cases, it appears to conflict with metadata expertise focused primarily on interoperability, the ability to share metadata across systems and to aggregate metadata outside of its local context.

The "Train to Share" project will address the skills sets identified by Lagoze *et al.* in order to demonstrate the feasibility of a large-scale distributed metadata production system designed to support interoperability. Domain expertise will be obtained by selection of a minimum of ten project participant teams representing the needed specializations and knowledge of local practices. These participant teams will include metadata specialists from libraries, museums, and other cultural heritage institutions with holdings of rare and unique materials. Participants will be selected to provide maximum geographic coverage of the state; of particular interest are projects that focus on ethnic and regional diversity. Development of bilingual materials and resources that are accessible to people with disabilities will also be a priority. An informal request for expressions of interest in this project resulted in a number of exciting project proposals

⁵ Lagoze, Carl, Dean Krafft, Tim Cornwell, Naomi Dushay, Dean Eckstrom, and John Saylor. "Metadata Aggregation and 'Automated Digital Libraries': A Retrospective on the NSDL Experience." In *Proceedings of the 6th ACM/IEEE-CS Joint Conference on Digital Libraries*. Chapel Hill, NC: ACM Press. pp. 230-239.

⁶ Shreeves, Sarah L., Ellen M. Knutson, Besiki Stvilia, Carole L. Palmer, Michael B. Twidale, and Timothy W. Cole. "Is 'Quality' Metadata 'Shareable' Metadata? The Implications of Local Metadata Practices for Federated Collections." In *Currents and Convergence: Navigating the Rivers of Change*. Proceedings of the ACRL 12th National Conference, April 7-10, 2005, Minneapolis, Minnesota. Chicago, IL: ALA, 2005. pp. 223-237.

(Attachment 4), and we are certain that additional participant teams will form to meet “Train to Share” project objectives. The THDI coordinator will work with participant teams to refine their projects and form collaborative partnerships that involve a variety of cultural heritage institutions. This will ensure that the projects have a wide enough scope and enough complexity of character to provide learning opportunities for the metadata specialists participating in our training.

The need for technical expertise within the participant teams will be minimized by providing technical support and resources for metadata development and digitization in general, including assistance with OAI-PMH compliance, through the University of North Texas Libraries and TSLAC. Participant teams may have existing repositories and digital collections, but this technical expertise is not assumed. Participants will have the option of having their collections digitized and hosted in UNT’s Portal to Texas History (<http://texashistory.unt.edu/>), reducing the technical barriers that often overwhelm even skilled professionals who are new to digital collections. Staff at TSLAC will assist participant teams in understanding the relationships between different metadata schemas and will develop XSL transformations, effectively crosswalks, that will support larger interoperability goals, such as the ability to distribute metadata over OAI-PMH and/or protocols such as Z39.50, SRU, and OpenSearch. The collaborative digital collections developed by participant teams will ultimately be made available through the IMLS Digital Collections and Content gateway (<http://imlsdcc.grainger.uiuc.edu/>) and through Texas Heritage Online, a federated search application that brings together collections from libraries, archives, museums, and other cultural heritage institutions across the state (<http://www.texasheritageonline.org>).

Metadata expertise is not a prerequisite for participation in this project, although some familiarity with cataloging in museum, library, archival, or other environments will be assumed. Individuals from participant teams will each receive approximately 80 hours of formal instruction in metadata production for digital library projects, and they will be expected to use what they have learned through the workshop series by producing a collaborative digital product appropriate to their domain, region, or local holdings. By focusing on results rather than on training alone, we will be able to monitor and assess the outcomes of the training program. Metadata records produced by participant teams will be key indicators of the knowledge, skills, and abilities gained by individual team members. If the “Train to Share” project is successful in Texas, with our geographic, cultural, and institutional differences, it should be easily replicable on a national scale, and we expect that our modifications of the “Cataloging for the 21st Century” workshop series will make this a more useful learning opportunity for all metadata specialists.

3. Project Design and Evaluation Plan

The immediate audience for this project is the pool of metadata specialists working in libraries, archives, museums, and state and local government. Traditionally, these specialists have worked within separate communities of practice, using different tools and professional jargons to produce disparate experiences and products for end users. As a result, the metadata produced in these various communities of practice has been of uneven quality and with little emphasis on interoperability. Through activities including outreach, observation, education, and production, the “Train to Share” project will assist metadata specialists in envisioning, developing, and sustaining digital products that can be combined seamlessly to provide a rich experience for the ultimate audience of the project, the end user community consisting of students, teachers, and researchers interested in Texas history and heritage.

The “Train to Share” project will include three phases. In the first phase, outreach and observation, separate communities of practice from libraries, archives, museums, government agencies, and other cultural heritage institutions will be identified. A training and outreach coordinator from the museum community will be hired to balance the project team and to lead individual consultations and focus groups, some held at statewide meetings of library, archives, and museum professionals. These activities will help us specify the needs to be addressed in a cross-cultural training program, along with the depth of resources and knowledge already available.

In the second phase, education, trainers from TSLAC and Amigos Library Services will adapt the “Cataloging for the 21st Century” workshop series from the Library of Congress to incorporate the needs and traditions of the separate communities of practice. Participant teams and other interested individuals will be trained using the adapted workshop series, which will require a minimum of five two-day workshops offered at each of at least seven locations across the state, plus one additional online-only offering. By bringing the workshops to our participants, we will minimize travel costs and related expenses. During this phase, the training and outreach coordinator will assist teams by providing ongoing consultation and resources for skills development.

In the final phase, production and evaluation, our participant teams will put what they have learned into practice through the development of a total of ten digital products. In an effort to promote diversity and encourage local support for the individual projects, each team will be required to develop a project plan for a collaborative digital product appropriate to the needs and interests of team members. These plans will include details on number and types of materials to be digitized, metadata needs for the collection, and plans for hosting and providing access to the collection within the term of the grant. Each collection will consist of a minimum of 1,000 objects chosen from the holdings of the various team members, fully described using an appropriate metadata schema that can be crosswalked to allow interoperability. Participant teams are strongly encouraged to contribute matching funds, in addition to cost share in the form of staff time and resources, to support the development of these collections.

Evaluation is built in to all three phases of our plan. A Grant Advisory Committee will provide expert knowledge of specific practices within various communities of practice and will review the results of focus groups during the first phase. In the second phase, they will monitor development and implementation of the workshop series in order to ensure the best learning environment for program participants. In the third phase, the THDI outreach and training coordinator will review the products of the workshops, including deliverables such as project plans, local controlled vocabulary lists, and actual metadata production, on an ongoing basis to ensure quality and allow opportunities for remediation as needed.

The Texas State Library and Archives Commission is strongly committed to the principles of Outcome Based Evaluation (OBE), and two OBE workshops will assist us in developing a logic model and evaluating project outcomes. An initial workshop, facilitated by the THDI coordinator, will assist the Grant Advisory Committee and Grant Oversight Committee, composed of representatives from grant partners, in establishing a logic model for the project. A final OBE workshop, facilitated by an outside consultant, will evaluate the outcomes of the project as a whole. In preparation for the workshop, the THDI outreach and training coordinator will prepare the following documents:

- A report from each of 10 project participants, with details about specific outputs.
- A report from Amigos Library Services compiling individual evaluations from all attendees of training sessions.
- A report from each of the 10 Advisory Board members, with reviews of the outputs from the project participants and assessment of the success and value of the training sessions based on the evaluations, training packets, and other data.

The OBE Workshop will then bring together up to 30 members of the project participant teams, the 8 Advisory Board members, and representatives from TSLAC, Amigos, and UNT along with additional members of the THDI Steering Committee to review the outputs of the project and try to come to some conclusions about the success of the training. In addition, the workshop participants will identify any improvements to the workshop series needed prior to release of the revised series to the Library of Congress.

A final report of 10-20 pages (plus attachments) suitable for dissemination will be produced following the OBE Workshop. This report will document the project outcomes and compare those outcomes to the initial logic model. We expect these to include:

- Significant increases in knowledge by and among participating metadata specialists, as measured by improved metadata quality and consistency.
- Improved access to the rare and unique materials held by cultural heritage institutions, as measured by the number and type of objects available from project participants at the end of the project.
- New and sustainable partnerships vital to the ongoing development of digital projects across the state.

These outcomes will contribute to improved experiences for end users of digital library systems, both statewide and nationally.

4. Project Resources: Budget, Personnel, and Management

The Texas Heritage Digitization Initiative began as an informal coalition of libraries, archives, and museums, and it retains some of that informal structure presently. It is administered by a volunteer Steering Committee with a total of 19 members (see attachment 5). The Texas State Library and Archives Commission serves as the institutional host for the Initiative and has the responsibility for hiring staff and administering grants on the Initiative's behalf.

Budget

The "Train to Share" project budget is divided into three broad areas: training, student support, and administration. A total of \$133,125 in grant funds will be used for training, excluding direct student support. This will cover costs of materials, supplies, consultant/trainer fees, and travel for a total of 50 workshop sessions, all to be arranged through a partner contract with Amigos Library Services. Some portion of these costs will be offset by revenues from the workshops and meetings; these revenues are included as cost share in our detailed budget, and Amigos will remit the fees to TSLAC to support other project activities (for a fuller explanation, see budget justification). In accordance with our sustainability plan (below), workshop fees will be set at a level necessary for long-term continuance of the series. Project participants will receive tuition assistance, but additional students will be allowed to attend at regular Amigos member rates, currently \$335 for a two-day workshop. Although that rate is higher than respondents to the THDI training survey preferred, it is nonetheless competitive with similar workshops held in other parts of the nation.

Student support is the largest component of the project and is divided into two parts. A total of 10 one-year contracts, renewable for up to three years, will be completed with participants across the state. The first part of this contract consists of reimbursements for workshop fees and funds for travel to training workshops when needed. This totals \$118,750 in grant funds over three years and will allow a minimum of three students from each project to attend each of the training courses, with discounts for additional students. The second part of the student support budget, totaling \$90,000 in grant funds over three years, will go to participating projects in the form of stipends to assist students in developing, creating, and sharing collaborative digital projects. Funds may be used for staff release time (to allow the hiring or training of additional staff to assume responsibility for other projects), for needed equipment and supplies, for outsourcing of digitization, and/or for payment of fees for hosting or providing access to digital projects. To promote sustainability, participants will be asked to match these stipends on a 1:1 basis. A preliminary request for expressions of interest is attached along with representative responses (Attachment 4).

Administration of the project will include the salary of a full-time outreach and training coordinator, whose job will be to assist in the development of the workshop series and provide individual training and consultation. A job description for this position is included in the resumes for key project personnel; because the outreach and training coordinator will be vital to the success of the grant, we have budgeted it at the equivalent of a education curator in the museum community, and we have allocated three months in the project schedule for recruitment and hiring for this position. Administrative costs also include other grant expenses not directly related to training or support, including travel to professional conferences as requested by IMLS, for a total of \$4,200 per year for the project partners, and technical support and hosting services provided by the UNT Libraries. A total of \$176,042 in grant funds is requested for these activities. Cost share for travel, equipment, and other expenses will be provided by TSLAC and UNT. TSLAC will also provide all indirect funds required for the grant out of local resources.

Staff

In accordance with the focus of this grant towards providing continuing education services to collaborative digital products, the three strategic partners (Texas State Library and Archives Commission, the University of North Texas Libraries, and Amigos Library Services) have all committed staff time and resources to the "Train to Share" project.

Texas State Library and Archives Commission:

- Danielle Cunniff Plumer, Texas Heritage Digitization Initiative coordinator, will serve as the principal investigator for the grant. Dr. Plumer will also serve as a member of the Grant Oversight Committee with primary responsibility for assessment and quality assurance, speak at state and national meetings as a representative of THDI, oversee the development and operation of the Texas Heritage Online search application, and coordinate THDI regional and statewide meetings and events (0.4 FTE average over three years).
- Beverley Shirley, Library Resource Sharing division director, will serve as the primary administrative contact for the grant and will complete and submit all required grant documentation and reports. Ms. Shirley will also serve as a member of the Grant Oversight Committee, attend state and national meetings as a representative of THDI, and coordinate the activities of TSLAC related to THDI (0.05 FTE).
- The Texas State Library and Archives Commission will hire a full-time outreach and training coordinator (job description attached) as project manager for the "Train to Share" program. Working closely with the THDI coordinator, the outreach and training coordinator will conduct focus groups, develop training materials, and oversee training sessions throughout the state. In order to improve outreach to museums, we will seek a person with professional or educational background in museum studies. This will be a 33-month temporary position.

University of North Texas Libraries:

- Dreanna Belden, coordinator for grants and development, will oversee the THDI Training Work Group and Grant Advisory Committee (0.05 FTE).
- Cathy Hartman, UNT Libraries assistant dean for technology and digital projects, will serve as a member of the Grant Oversight Committee, attend state and national meetings as a representative of THDI, and coordinate the activities of UNT related to THDI (0.02 FTE).

Amigos Library Services:

- Gina Minks, imaging and preservation services manager, will oversee the development of metatdata training workshops based on the Library of Congress "Cataloging for the 21st Century" series, with modifications as recommended by grant partners. She will also serve as a member of

the Grant Oversight Committee, speak at state and national meetings as a representative of THDI, and assist with qualitative and quantitative assessment of the workshop program.

- Bill Walker, imaging field services officer, will serve as primary instructor for the metadata training workshops. He will assist with recruitment and training of additional instructors, preparation and maintenance of course materials, and administration of the workshop series.

Management

Management of the “Train to Share” project will be performed by the Grant Oversight Committee, composed of representatives from the project participants plus the chair of the THDI Steering Committee.

- Chair, THDI Steering Committee
Elected at the annual THDI Meeting
- Danielle Cunniff Plumer, THDI coordinator
Texas State Library and Archives Commission
- Beverley Shirley, director, Library Resource Sharing Division
Texas State Library and Archives Commission
- Cathy Hartman, UNT Libraries assistant dean for technology and digital projects
University of North Texas Libraries
- Gina Minks, imaging and preservation services manager
Amigos Library Services

In addition to these staff members, the THDI Steering Committee will appoint a Grant Advisory Committee including experts in the area of continuing education, metadata, and digitization. This committee will be tasked with assisting in the development of the workshop series and evaluation and dissemination of grant results. The following have agreed to serve on this committee:

- Chair: Dreanna Belden,
University of North Texas
- Laura Casey, state coordinator, Museum Services Program
Texas Historical Commission
- Tine Walczyk, manager, Continuing Education and Training
Texas State Library and Archives Commission
- Dr. Pat Galloway, associate professor
School of Information, The University of Texas at Austin

A minimum of four additional members, including faculty from schools of library and information science and graduate-level museum studies programs, will be added to this committee to provide specific domain expertise and knowledge of the target audience.

5. Dissemination

Texas State Library and Archives Commission staff will be responsible for producing all project reports and for preparing all materials to support THDI Steering Committee and Grant Oversight Committee meetings. The THDI coordinator and the outreach and training coordinator, in cooperation with members of the Grant Oversight and Advisory Committees, will be responsible for disseminating information about the project and its results. Avenues for dissemination include professional journals, conferences, newsletters, publicity materials, and meetings.

In particular, “Train to Share” project members will submit papers to local conferences including those sponsored by the Texas Library Association, the Texas Association of Museums, the Texas State Historical Association, and the Society of Southwest Archivists. Nationally, we will also submit proposals to the American Library Association, Society of American Archivists, and American Association of State and Local History conferences and meetings. We hope to present results at additional meetings, including IMLS-sponsored conferences such as WebWise.

Dissemination of our results will also include delivery of the adapted “Cataloging for the 21st Century” workshop materials to the Library of Congress, enabling us to reach a larger audience, and we will work with the AASLH Field Services Alliance to promote the course series within the museum community. We also hope to work with RLG Programs to ensure that our work is both replicable and extensible to the international, community. We expect the “Train to Share” project to contribute substantially to an improved understanding of the role of cross-cultural sharable metadata in cultural heritage digitization programs.

6. Sustainability

The “Train to Share” project has been designed for sustainability. A common failing of grant-funded training initiatives is that they cannot be sustained once the grant funding has run out. As part of its role as a strategic partner, Amigos Library Services has committed to offer the workshop series throughout its five-state service area for a period of no less than three years following the conclusion of the grant, or until the Library of Congress eliminates or substantially modifies the “Cataloging for the 21st Century” series. Workshop fees will be charged from the beginning to support the concept that the workshops provide valuable training that will benefit individuals and institutions interested in digital projects.

For the initial period of the grant, project participants will be required to send three members from their collaborative projects to each training workshop at no charge. Up to three additional members will be entitled to reduced workshop fees. Other institutions will pay full fees, which will be used as cost share to support other grant activities. Our goal is to create a series of workshops that Amigos Library Services will be able to offer on a cost-recovery basis following the completion of the grant, which they have committed to do for a minimum of three years.

In this three-year project, we plan to develop a sustainable, outcomes-based continuing education program for metadata specialists. We believe that this will result in an overall increase in metadata quality and shareability which will lead to greater interoperability within the cultural heritage sector and with outside partners such as search engine developers. By providing improved access to rare and unique materials of interest to our increasingly diverse constituents, we will not only promote the continued relevance of librarians and other metadata specialists as information providers, we will enhance the value and reputation of libraries, archives, museums, and other cultural heritage institutions in a global economy based on information.