

**Train to Share: Interoperability Training for Cultural Heritage
Institutions
Laura Bush 21st Century Librarian Program Grant**

Award # RE-06-08-0084

Texas State Library and Archives Commission

Interim Report #1

September 1, 2008 – February 28, 2009

Project Director: Beverley Shirley, Director Library Resource Sharing

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Project Purpose:

In the three-year Train to Share (TtoS) project, the grant partners 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 seamlessly across communities to provide a rich experience for digital library users. Anticipated outcomes for TtoS 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.

In order to accomplish the desired project outcomes, TtoS is divided into three phases. Each phase is associated with a set of project objectives and activities against which to measure our progress.

- I. In the first phase, outreach and observation, separate communities of practice from libraries, archives, museum, government agencies, and other cultural heritage institutions will be identified.
- II. In the second phase, education, project trainers will adapt the Library of Congress' "Cataloging for the 21st Century" workshop series to incorporate the needs and traditions of the separate communities of practice. Participant teams will be trained using the adapted workshop series.
- III. In the final phase, production and evaluation, our participant teams will put what they have learned into practice through the development of ten digital products, fully described using an appropriate metadata schema that can be crosswalked to allow interoperability.

Project Activities and Accomplishments, Report Period I:*Activities in overall support of the grant:*

Karen Frizzell joined the grant team in February 2009 as THDI outreach coordinator. This grant-funded position is responsible for coordinating TtoS training workshops and activities and for leading individual consultations and focus groups. Karen's curriculum vita is attached (Appendix A).

Phase I Benchmarks:

- A. Participating projects identified (Targeted for February 2009)
On December 5, 2009, we issued a call for proposals to participate in the TtoS program. A copy of the call for proposals is attached (Appendix B)
Teams must include one library, one museum, and one other cultural heritage institution. There will be one team selected from each of ten geographic regions in the state. The initial response to the call for

proposals was disappointing, probably due to the downturn in economy that has made it difficult for institutions to commit their resources. Nevertheless, we have tentatively identified eight teams and are encouraged by collections brought to our attention during the most recent round of TexTreasures [digitization] grant proposals. We hope to have all ten teams in place by April 30.

- B. Grant Advisory Committee (GAC) appointed. *Completed.*
The GAC is comprised of continuing education providers and faculty at museum and library studies programs and will provide expert knowledge of specific practices within those communities. The GAC will review the results of focus groups during the first phase and will monitor development and implementation of the workshop series in the second phase of the project.
- C. Grant Oversight Committee and Grant Advisory Committee constructs a logic model (Targeted for December, 2008)
Due to delays in hiring the training coordinator, the Outcome Based Evaluation (OBE) workshop originally scheduled for December, has been pushed back to April. The GOC and GAC will be asked to review the IMLS website course on “Shaping Outcomes” prior to the workshop. Using the tools available on the IMLS website and the structure provided by the workshop environment, the GOC and GAC will complete the project’s logic model.
- D. Metadata practices survey. (Targeted for February 2009)
Surveying the practices of the partners participating in the Texas Heritage Online statewide portal to digitized cultural heritage collections, we found that of the 68 collections identified from the partner institutions:
- 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
 - 8 were static Web pages with no formal metadata at all at the beginning of the project.
- Our experience is that these results are fairly representative of the state, and we have developed the skeleton of the training curriculum based on these findings. When the ten project teams have been finalized, we will apply the same analysis to the members of these teams, adjusting the curriculum as needed.
- E. Outreach efforts, Texas Heritage Digitization Initiative (THDI) Meeting. *Completed.*
The annual THDI meeting is the ideal venue for reaching a cross-section of the state’s librarians and archivists. THDI held its 6th annual meeting on

February 13, 2009, at the Lubbock Public Library. Lubbock is located in West Texas, geographically distant from the large urban centers in Dallas, Houston, San Antonio, and Austin. Yet Lubbock is home to a number of institutions that serve as curators and caretakers of Texas' cultural heritage. By locating this meeting in Lubbock, we were able to reach an important audience that has seldom had the opportunity to participate in this type of knowledge-sharing event. 50% of the persons at this meeting were first-time attendees. Project manager Danielle Plumer presented an introductory program on the Train to Share project along with a solicitation for institutions to participate in the upcoming training. Digital project managers from around the state gave updates on key projects, shared issues they are facing in digitizing and making resources available, and offered some solutions. Presentations are available at <http://www.thdi.org/about/thdi-events/2009-meeting/>

Phase II Benchmarks:

Although the education phase of the project is not scheduled to begin until March 2009, we are ahead of schedule. In this phase trainers will adapt the "Digital Library Environment" workshop series from the Library of Congress (<http://www.loc.gov/catworkshop/courses/index.html>) to incorporate the needs and traditions we are identifying in Phase I. We have completed a rough analysis of the Library of Congress series against the purposes of this project and the results of the metadata survey to identify areas that will need to be amended. The analysis is attached. (Appendix C)

We have also developed a standard revision process that will be applied to each of the Library of Congress modules:

- A. Preliminary review and revision by trainers from Amigos Library Services and Texas State Library and Archives Commission.
- B. Presentation of course to focus group, with detailed evaluations by students of workshop content, structure, and relevancy to professional practice.
- C. Further revision of course by Grant Advisory Committee, including faculty from LIS and museum studies programs and continuing education providers from Amigos, TSLAC, the Texas Library Association, and the Texas Historical Commission.
- D. Train the Trainers workshop. When presented in the field, each course will have one instructor from Amigos Library Services (who will also handle course logistics) and one instructor who is a professional cataloger or museum registrar.
- E. Presentation at 5 sites across the state (face to face instruction).
- F. Presentation online, two times during course of grant. Courses will be modified to incorporate both synchronous and asynchronous instruction. Courses will be mounted in Amigos' Centra courseware system and in the TSLAC Moodle system.

- G. Course evaluations will be collected and a final set of focus groups will be performed for each workshop.

In addition, several additional courses will be developed for either self-paced instruction or as stand-alone one-day courses to bring the total number of days of instruction in the series to ten. Based on our analysis, we recommend additional courses on:

- Overview of XML (self-paced)
This course will be required prior to the Metadata and Digital Library Development course. Students will be expected to understand basic XML syntax, well-formedness, and validity.
- Imaging Standards and Techniques (self-paced)
Although this is a metadata training project, not a digitization project, we expect that many of the participants will be digitizing materials during the course of the grant. This self-paced course will include video tutorials demonstrating preferred techniques for a variety of materials.
- Digital Project Site Visits (self-paced)
Students will be given opportunities to learn about established digital projects, with short overviews documenting the history of the project, current status, and types of objects included. 5-10 site visits will be developed.
- Rights Management for Digital Projects (one-day course, paired with Digital Project Planning)
This course will cover issues relating to copyright, permissions, and control of digital objects. Surrogates and derivatives will also be covered. Course material will be tailored to integrate with discussions of PREMIS in later courses.
- Interoperability and Metadata Migration (one-day course, paired with Controlled Vocabularies)
Although material related to interoperability is included in the Metadata Standards and Applications course, we feel that the focus of this grant encourages greater development of this topic. In addition, this will allow discussion of the lifecycle of digital projects and particularly enhancement, correction, and migration of metadata as projects evolve, digital library systems change, and content and technical standards are updated or created.

Anecdotal Information

In an application for a TexTreasuries grant to digitize materials from the Mexican Revolution, Claudia Rivers, Special Collections librarian at the University of Texas in El Paso wrote: "The three participating repositories (UTEP Library, EPPL, and EPCHS) hope to also participate in the Texas Heritage Digitization Initiative project, Train to Share, which will provide training in scanning technologies and metadata appropriate for sharing. The Train to Share grant will ensure that the participants are familiar with best practices in creating digital files

intended for wide distribution, and the Train to Share grant may even provide limited funding to be used for software or up- to- date equipment.” At the Texas Association of Museums meeting in El Paso, March 17-20, 2009, staff members from the UTEP Libraries and El Paso Public Library again expressed their eagerness to participate in this training and appreciation for the fact that the training would be offered in El Paso, as they currently have no travel budgets whatsoever.

Certification:

In submitting this report, I certify that all of the information is true and correct to the best of my knowledge.

A handwritten signature in cursive script that reads "Beverley Shirley".

March 27, 2009
Beverley Shirley
Director, Library Resource Sharing

Appendix A

Karen L. Frizzell

4700 E. Riverside • Unit 1023A • Austin, TX 78741 • 402-490-7387 (day/evening)

Education

MLS from the University of Missouri-Columbia, 2005

MA in English from Creighton University, 2002

BA in English from the University of Nebraska-Lincoln, 1999

Library & Museum Experience

Outreach Coordinator, Texas State Library & Archives Commission, Austin, TX February 2009-present

- Coordinate training efforts for the IMLS grant-funded program, the Texas Heritage Digitization Initiative
- Monitor THDI outreach activities
- Develop and implement tools to analyze program effectiveness

Associate Curator, Durham Museum, Omaha, NE, May 2008-February 2009

- Managed the department and exhibit installations in the absence of a Curator (3 months)
- Managed a Photo Archive of over 500,000 images, meeting an annual sales goal of \$20,000
- Supervised the Photo Archives Associate, 5 volunteers and a Collections Assistant
- Created all in-house exhibits
- Wrote and/or edited all the text for exhibits wall panels and exhibit text labels
- Spearheaded a digitization program to promote the historic photograph collections
- Initiated a department-wide recycling program

Collections Manager, Durham Museum, Omaha, NE, December 2005-May 2008

- Maintained the entire museum collections: library, archives, and all three-dimensional objects including a 15-million-dollar coin, rare book and manuscript collection
- Managed the museum's catalog using PastPerfect museum software & cataloged new accessions
- Managed legal transfer of title for all accessions and loans
- Co-wrote the departmental policies & procedures manual
- Completed condition reports and other work related to installation and deinstallation of temporary exhibits
- Completed research as necessary for the identification of artifacts and in-house exhibits
- Managed Pest Management system
- Aided with the conceptual direction of new exhibits
- Wrote the text for exhibit wall panels and exhibit text labels
- Streamlined accessioning procedure to eliminate hand-written records
- Supervised curatorial interns

Instruction and Public Services Librarian & College Archivist, Dana College, Blair, NE, August 2004-Dec.2005

- Answered reference questions and assisted patrons in using the library's products and resources
- Taught customized Library Instruction sessions for individual academic courses
- Taught a section of the Liberal Arts Reading Program every year
- Assisted with Collection Development for Reference and General Collection
- Conceptualized and organized a campus-wide event featuring a documentary producer from the PBS film "Afghanistan Unveiled," resulting in a 20% campus turn-out
- Applied for and received a grant to host an exhibit about Alexander Hamilton, a competitive grant sponsored by the American Library Association, the National Endowment for the Humanities, and the Gilder Lehrman Institute of American History (insurance value \$60,000)
- Managed the Dana College Institutional Archive and aided faculty with institutional research
- Participated on Faculty committees
- Supervised student workers

Intern, Digital Initiatives Department, University of Washington Libraries, Seattle, WA, May-June 2005

- Researched current metadata schema for digital video and completed research on persistent identifiers
- Created 13 metadata records using Dublin Core for DSpace
- Attended an eight-hour training session on METS hosted by staff from the Library of Congress
- Gained an understanding of the usage and capabilities of XML, METS, MODS, OAI-PMH, OCR

Intern, Electronic Text Center & Center for Digital Research in the Humanities, University of Nebraska-Lincoln

Libraries, Lincoln, NE, June-July 2005

- Gained an understanding of best practices in scanning images and entering metadata into CONTENTdm
- Learned about the specific purpose and functionality of TEI, EAD, XML, and XSLT
- Shadowed staff and faculty and attended several meetings

Library Assistant (part-time), Metropolitan Community College, Omaha, NE, July 2003-July 2008

- Assisted students and faculty using online catalog and databases
- Answered reference questions and gave occasional library tours
- Checked out/in materials for patrons
- Operated library in absence of supervisor
- Developed a Web Site Evaluation Tool for the library

Student Worker (part-time), Creighton University Library, Omaha, NE August 2001-August 2002

- Assisted Periodicals Department with preparing journals going to and coming from the bindery
- Created spine labels and followed security tagging procedures for Technical Services Department
- Retrieved and photocopied materials for faculty requests and for the Inter-Library Loan Office

Teaching Experience

Adjunct Instructor of English, Nebraska College of Business, Omaha, NE, September 2002-October 2002

- Taught two sections of Composition I, a course designed to improve grammar and basic writing skills
- Lectured and sometimes worked one on one with students
- Attended faculty meetings and events sponsored by the college

Adjunct Instructor of Business, Lincoln School of Commerce, Lincoln, NE, August 2000-October 2000

- Taught college students how to use Windows 2000, how to perform various tasks in Word, Excel, Access and PowerPoint, and how to do basic research using the Internet.
- Lectured and worked one on one with students
- Designed course syllabi and grading systems for these courses
- Supervised and graded weekly quizzes and unit examinations
- Attended faculty meetings and events sponsored by the college

Conference Papers Delivered

"The Quest in Paula Meehan's *Dharmakaya*," International Association for the Study of Irish Literatures, National University of Ireland, Galway, Ireland July 20-23, 2004

"Feminism's Perilous Balance: Ireland and the Self in Paula Meehan's *The Man Who Was Marked By Winter*," American Conference for Irish Studies, Southern Regional, *Real Ireland*, Emory University Atlanta, Georgia, March 4-7, 2004

"The Dance of the Self in Paula Meehan's *Pillow Talk*," University of Missouri-Columbia's 13th Annual English

Graduate Student Association Conference, *Literature of the Margins*, Columbia, Missouri, Feb 21-22, 2004

Professional Development

Photoshop I, Metropolitan Community College, Summer 2008

Black and White Photography, Metropolitan Community College, Spring 2008

Intermediate XML, University of Nebraska, Center for Digital Humanities, Lincoln, NE, Summer 2007

Introduction to XML, University of Nebraska, Center for Digital Humanities, Lincoln, NE, Summer 2007

Introduction to Past Perfect Museum Cataloging Software, Denver, CO May 18, 2006

How Information Technology is Changing Scholarship: Cyber-infrastructure, Digital Preservation, and the New

World of Scholarly Communications, Clifford Lynch, Coalition for Networked Information. Lincoln, NE, April 17, 2006

Libraries and Librarianship in the Czech Republic, North Carolina-Chapel Hill SILS-- Prague, Czech Republic May-June 2004

Introduction to Digitization Workshop, Nebraska Library Commission, April 14, 2004, Lincoln NE

Advanced Digital Camera, Metropolitan Community College, March 24, 2004

Committee Work

Selection Committee for Collections Manager, Durham Museum, June 2008

Selection Committee for Assistant Curator, Durham Museum, May 2006

Academic Policies Committee Member, Dana College 2005-2006

Event Planning Committee Member, Women's History Month at Metro Community College, March 2004

Recorder for Dana College Library Departmental Meetings 2004-2005

Selection Committee Member for Assistant Director, Upward Bound Program, University of Nebraska-Lincoln, Office of Multi-Cultural Affairs, April 2000

Honors and Awards

Nominated for the Nebraska Library Leadership Institute--2005

Telluride Film Festival Student Symposium Scholar, Telluride, CO, September 2-7, 2004

Louise A. Nixon Scholarship for Graduate Study in Library Science, Nebraska Library Association, 2004

Nebraska Library Commission Scholarship for Graduate Study in Library Science 2004, 2005

Creighton University Presidential Fellowship for Graduate Studies in English 2000-2002

Ronald E. McNair Post Baccalaureate Research Scholar in Developmental Psychology 1999

Peter Kiewit Foundation Scholar, 1993-1997

Community Involvement

Board Member, Landmarks, Inc. (Omaha's Historic Preservation Society) April 2008-February 2009

Volunteer Photographer, Destination Midtown May 2008-February 2009

Marketing Committee Volunteer, Nebraska Food Cooperative, 2006-2007

Member & Volunteer, Omaha Green Coalition, May 2008-February 2009

Member & Volunteer, Green Builders Association, May 2008-February 2009

Vice President, Jackson Street Condo Association, April 2006-February 2009

Campaign Volunteer, Hillary Clinton for President Campaign, Council Bluffs, IA, December 2007

National History Day Judge--Research Paper, Final Round (Omaha District), March 2007

Play Lab Host, Great Plains Theatre Conference March 2007

ESL Tutor, Lincoln Literacy Council, Lincoln, NE 1999-2000

Board Member, National Organization for Women, Lincoln Chapter (1998-1999)

Appendix B

TEXAS STATE LIBRARY AND ARCHIVES COMMISSION Train to Share: Interoperability Training for Cultural Heritage Institutions Call for Proposals

The Texas State Library and Archives Commission (TSLAC), working with the University of North Texas Libraries, Amigos Library Services, and a variety of additional partners and participants, has been awarded an IMLS grant for “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 seamlessly across communities to provide a rich experience for digital library users.¹

The “Train to Share” project will include three phases.

1. In the first phase, outreach and observation, separate traditions of practice from libraries, archives, and museums will be identified and specific tools, jargon, and behaviors will be assessed for consistency and compatibility.
2. In the second phase, education, trainers will adapt the “Cataloging for the 21st Century” workshop series from the Library of Congress to incorporate the needs and traditions identified in phase 1. Regional cross-cultural teams will be trained using the adapted workshop series, which will involve five two-day workshops offered at each of at least five locations across the state.
3. In the final phase, production, a total of ten digital products will be developed by these regional cross-cultural teams, each including museum, library, and archives professionals working collaboratively.

The Texas State Library and Archives Commission invites proposals from collaborative teams representing multiple institutions interested in participating in Train to Share. Each proposal must address the following:

- Team composition
 - o Teams will include at least one (1) academic, special, school, or public library
 - o Teams will include at least one (1) museum
 - o Teams will include at least one (1) additional institution, including state and/or local government agencies, archives, historical and/or genealogical societies, library systems, and corporations. There is no restriction on the maximum number of additional institutions.
 - o One team will be selected from each of 10 regions across the state. Regions will reflect the current boundaries of the ten regional library systems (<http://www.texshare.edu/memberinfo/libcats/map/libregions.html>).
 - o Preference will be given to teams with members from institutions that do not have existing digitization programs or a history of producing metadata for digital objects.
- Team Responsibilities
 - o Each team will send at least two representatives to each of the five two-day workshops in the “Train to Share” workshop series. Members receiving training must be professional employees of participating institutions and should work in the area of metadata production (e.g., library cataloger, museum curator/registrar, etc.). The workshops will be held at

¹ For more information on sharable metadata, see “Moving towards shareable metadata,” by Sarah L. Shreeves, Jenn Riley, and Liz Milewicz, in *First Monday*, volume 11, number 8 (August 2006): http://firstmonday.org/issues/issue11_8/shreeves/index.html

- multiple locations around the state over a two-year period to minimize travel requirements. The same two individuals do not need to attend every workshop.
- o Each team will develop at least one collaborative digital project during the three-year period of the grant. The project should be thematic in nature, include materials from the collections of each partner institution, and include at least 1,000 digital objects with full metadata for each by the end of the grant period. 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.
 - o Teams will be responsible for providing cost share of \$3,000 per year, primarily in the form of staff time. Additional matching funds will not be required but preference may be given to teams with evidence of strong institutional support in the form of matching funds applied to workshop registrations, digitization equipment and/or outsourcing, and digital asset management systems.
 - o Teams will present information about their digital projects at annual THDI regional meetings and/or at national meetings when appropriate.
 - o Teams will complete bi-annual reports on all grant-related activity in accordance with IMLS guidelines.
- TSLAC Responsibilities
 - o TSLAC will pay full travel and training registration costs for up to two members from each team; additional members may attend at reduced registration rates.
 - o TSLAC will provide a stipend of up to \$3,000 per year per project to support development of the project. 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 through standards-compliant digital asset management systems.

Please contact Danielle Cunniff Plumer (contact below) with any questions. Submit proposal by December 1, 2008, to:

Danielle Cunniff Plumer, Coordinator
Texas Heritage Digitization Initiative
Texas State Library and Archives Commission
PO Box 12927
Austin, TX 78711-2927
512.463.5852 (phone)
512.936.2306 (fax)
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Appendix C

Recommended Adaptations to Digital Library Environment Workshop Series from the Library of Congress

In the second phase, education, trainers will adapt the "Digital Library Environment" workshop series from the Library of Congress (<http://www.loc.gov/catworkshop/courses/index.html>) to incorporate the needs and traditions identified in Phase I. Some courses will need more clarification and/or supplementary material than others.

- **Rules & Tools for Cataloging Internet Resources**

This course will be difficult to integrate due to the nature of the examples and the reliance on MARC21 and AACR2. We will develop supplementary materials comparing AACR2 with Cataloging Cultural Materials (CCO) and Describing Archives: A Content Standard (DACS); a supplement on RDA may also be required. Many examples will be altered to increase the focus on digitized versions of primary source materials, including maps, oral histories, photographs/graphic images, and artifacts, as well as books and journals. Some examples of born digital materials will be retained. The course should be placed last in the series and should be treated as an advanced cataloging course dealing with specific difficult metadata creation tasks. This will also allow the practical implementation of application profiles.

- **Metadata Standards and Applications**

This course, developed by Diane Hillman, has been revised by both Diane Hillman and by Library of Congress staff. The two versions of the course will need to be compared; a cursory inspection does not identify a preferred version, and it may be that a third version incorporating elements of both will be created. There is some overlap between information presented the course and material presented in other courses in the series, particularly with respect to controlled vocabulary and thesaurus design, and to some extent it may be desirable to eliminate or de-emphasize this material. This course should be placed third in the series

- **Controlled Vocabulary & Thesaurus Design**

This course will require little modification. Specific screenshots and techniques may need to be updated over the course of the project; section on software will almost certainly need to be regularly updated. This course should be placed fourth in the series.

- **Metadata & Digital Library Development**

This course will require little modification. Additional specific information about digital asset management systems currently available should be presented as a supplement. Because selection of a digital asset management system often

determines choice of metadata and availability of controlled vocabularies, it should be placed second in the series.

- **Digital Project Planning & Management Basics**

This course contains a substantial amount of material that duplicates content in the Metadata Standards and Applications course and the Metadata and Digital Library Development course. It will probably be advisable to remove the duplicate content from this course, reducing the course from a two-day to a one-day course. The course should be offered first in the course sequence.

At the conclusion of the project, copies of all course revisions and recommendations for further redevelopment will be presented to the Library of Congress and the ALCTS Continuing Education Materials Committee.