



Cleveland State University
EngagedScholarship@CSU

Michael Schwartz Library Publications

Michael Schwartz Library

5-19-2010

Building the Infrastructure: The OhioLINK CollaboraTeS Project

Barbara J. Strauss

Cleveland State University, b.strauss@csuohio.edu

Margaret Maurer

Kent State University - Kent Campus, mbmaurer@kent.edu

Follow this and additional works at: https://engagedscholarship.csuohio.edu/msl_facpub

 Part of the [Library and Information Science Commons](#)

[How does access to this work benefit you? Let us know!](#)

Repository Citation

Strauss, Barbara J. and Maurer, Margaret, "Building the Infrastructure: The OhioLINK CollaboraTeS Project" (2010). *Michael Schwartz Library Publications*. 2.

https://engagedscholarship.csuohio.edu/msl_facpub/2

This Presentation is brought to you for free and open access by the Michael Schwartz Library at EngagedScholarship@CSU. It has been accepted for inclusion in Michael Schwartz Library Publications by an authorized administrator of EngagedScholarship@CSU. For more information, please contact library.es@csuohio.edu.

Building the Infrastructure: The OhioLINK CollaboraTeS Project

Margaret Maurer
Head, Catalog & Metadata
Kent State University Libraries

Barbara Strauss
Assistant Director for Technical Services
Cleveland State University Library

and **Julie A. Gedeon**
Coordinator of Assessment
Kent State University Libraries

OVGTSL May 2010 1

Reinventing OhioLINK 2006-2009

- After 20 years OhioLINK reassessed its model in light of economic, technological and global issues
- Priority service areas identified:
 - Improve our electronic information delivery systems to connect users to needed information effectively
 - Optimize content availability statewide with sustainable economic models
 - Look as broadly as possible across all operations to be more effective and more efficient. Use group action if it ensures a highly effective and efficient outcome
 - Maximize our resources, efficiency and effectiveness to the state through efforts to obtain grants and leverage our resources and grant possibilities through partnerships with Ohio public and school libraries, public agencies and business

OVGTSL May 2010 2

How did CollaboraTeS emerge?

- OhioLINK vision assessment in 2007
 - **OhioLINK can increase the cost-effectiveness of the USO college and university libraries by collaboratively and collectively managing the growing physical and electronic collections**
 - Minimizing the long-term capital and operating costs of storing, preserving and providing improved access to current and future library materials
 - implementing centrally new software tools for information management and access that can be shared and utilized at all campuses
 - coordinating library operations across Ohio to expand cost efficiencies and savings
 - collaborating with other Ohio information dependent groups (e.g. public libraries, K-12, and business incubators) to enhance the quality of education, research, and economic development beyond OhioLINK's core constituencies

OVGTSL May 2010 3

DMS Taskforces

- Metadata strategies for the contemporary consortia environment
- Group Technical Services Activities
- Central Catalog Changes
- Transforming access to Library Services
- EAD archival documents repository
- Coordinated Depositories
- Statewide Electronic Requesting and Delivery of ILL Paper Article Requests

OVGTSL May 2010 4

At about the Same Time...

- DMS was discussing reports from the field (e.g. Calhoun's *The Changing Nature of the Catalog...*)
- Trying to discern the meaning and impact of "reinventing OhioLINK"
- Defining concepts we believed should be addressed in "reinventing OhioLINK"
- Overall, it was a time of uncertainty

OVGTSL May 2010 5

Reinventing DMSC

- From various taskforce reports, DMSC identified important technical services activities -- DMSC Action Plan (June 2008)
- Among the initiatives (that we could do something about):
 - Create an Ohio NACO Funnel
 - Identify cataloging resource in OhioLINK

OVGTSL May 2010 6

Group Technical Services

- **Definition:** Aggregating or centralizing technical services activities
- Based on the charge for Group Technical Services, demonstration projects were needed
- “Coalition of the Willing” or “Group TS2” A self-selected group of OhioLINK libraries examining how a cooperative technical services operation can be put in place as soon as practical.

OVGTSL May 2010 7

Projects

- Music scores cataloging (Cleveland State, YSU)
- CJK and Arabic cataloging (Univ. of Cincinnati and Cleveland State, OSU)
- Original cataloging (Denison/Kenyon, BGSU) (WSU, Univ. of Dayton)
- GOBI / PromptCat / Millennium workflow consultation (Belmont, Univ. of Akron)
- Special collections cataloging (Univ. of Dayton, OSU)
- Electronic record loading and authority control assistance (Belmont, YSU)

OVGTSL May 2010 8

Recommendations: Expertise

Technical Services personnel have expert knowledge of how metadata describing local and OhioLINK collections are encoded in the online catalog. This knowledge is essential when assessing options for improving public access for local constituent groups. It also is critical when there is a need to extract reports from the catalog to support local and cooperative collection development and management activities.

OVGTSL May 2010 9

Recommendations:

1. Use technology to enable new models of collaboration that coordinate expertise *virtually for greater efficiency without requiring physical relocation of expertise away* from local sites. For example, virtual statewide or regional hubs could be formed to handle certain functions, formats, languages, or subject areas (a hub being defined as a concentration of expertise and capacity). There could be hybrid models for some types of work as well, with certain physical sites coordinating virtually with experts around the state.

OVGTSL May 2010 10

Recommendations

2. The composition of the hubs must be flexible to accommodate changes that affect the availability of expertise and capacity at OhioLINK sites.
3. To realize the greatest benefit from such new collaborative arrangements, an individual or group (e.g., DMSC) should be given responsibility for facilitating their establishment and for coordinating and supporting them on an ongoing basis.
4. Use the data from the recent DMSC survey of catalog expertise to identify needed hubs related to cataloging and potential participants.

OVGTSL May 2010 11

Recommendations

5. Create and share documentation of the various methods used by GTS2 pilot participants for one site to accomplish cataloging for another site (e.g., for setting OCLC holdings, transferring catalog source information and completed records, receiving compensation, etc.)

OVGTSL May 2010 12

CollaboraTeS Project

- Inventory of technical services expertise in OhioLINK libraries
- Analysis of results
- OhioLINK libraries and CollaboraTeS
- CollaboraTeS working groups
- The CollaboraTeS model and other libraries

OVGTSL May 2010 13

Initial CollaboraTeS Inventory

- Inventory technical services expertise
- Institutional willingness to share / barter / contract that expertise
- Nature of work needed
- Does the nature of the institution matter?

OVGTSL May 2010 14

Timeline

- Oct 2008. Charged to create inventory
- Nov 2008—March 2009. Worked to design survey instrument
- April 2009. Tested survey instrument
- May 2009. Released survey to OhioLINK libraries

OVGTSL May 2010 15

CollaboraTeS Survey

<http://www.personal.kent.edu/~mbmaurer/documents/SurveyInstrument.pdf>

OVGTSL May 2010 16

Timeline, Continued

- Aug 2009. Submitted preliminary results to DMS
- Nov 2009. “CollaboraTeS” project name coined
- Nov 2009. CollaboraTeS spreadsheet is on OhioLINK Web page

OVGTSL May 2010 17

Survey Design / Methodology

- Secure, Web-based environment
- Self-identified institution representatives invited to submit
- Kent’s content management system for collection
- Two-stage project moving from spreadsheet to database

OVGTSL May 2010 18

Surveyed for Expertise in

- Languages
- Resource formats (DVDs, e-books, etc.)
- Cataloging schema and metadata standards
- Technologies
- OCLC products and services
- Participation in PCC programs

OVGTSL May 2010 19

What did we Need to Know?

- Measured who
 - Admitted they had the expertise
 - Was willing to share or barter that expertise
 - Was willing to work on a contract basis
- Measured who needed that expertise
- Contact information

OVGTSL May 2010 20

Assumptions – What we Thought we'd Find

- That libraries in large schools would be willing to help libraries in small schools
- That specialized expertise would reside in large libraries
- That more libraries would need assistance than would have expertise
- That smaller libraries won't offer expertise

OVGTSL May 2010 21

More Assumptions

- That collectively OhioLINK libraries would have expertise in all areas (no gaps)
- That libraries would only need more specialized subjects
- That libraries in national programs would have more resources to share

OVGTSL May 2010 22

Who Responded?

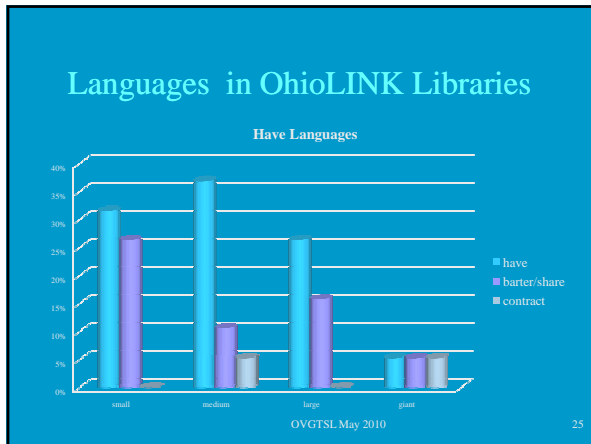
- Sent survey to 95 institutions
- Received 41 responses
- 43.16% response rate
- 31.58% participation rate in the online tool

OVGTSL May 2010 23

OhioLINK Libraries that have Language Expertise

- 19 institutions indicated they had language expertise in **33** languages
- 75 language entries in total
 - 24% of these were one-offs (18)

OVGTSL May 2010 24



OhioLINK Libraries that Need Language Expertise

- 15 institutions indicated they needed language expertise in 24 languages
- 47 language entries in total
- 11% of those who reported needing specific language expertise areas only needed transliteration, 9% needed complete cataloging

OVGTSL May 2010 26

Which Languages are Needed?

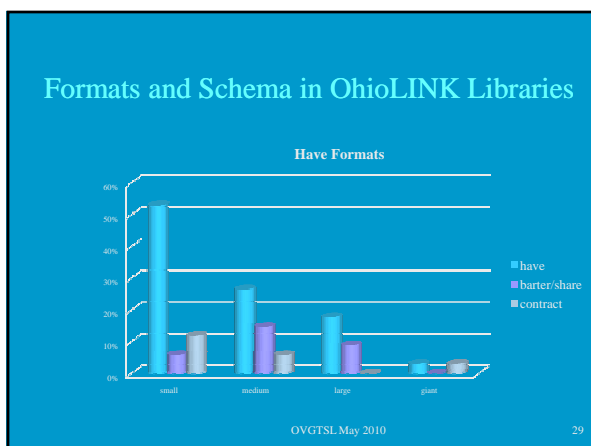
Language	Needed By
Arabic	6
Chinese & CJK	5
Indic languages	4
African and Slavic	3
Greek, Japanese and Nordic	2
15 other languages needed by at least 1 library	

OVGTSL May 2010 27

OhioLINK Libraries with Format and Schema Expertise

- 34 institutions indicated they had format and schema expertise in 49 areas
- 454 format and schema entries in total
- Admitted expertise in the 29 areas we asked about plus an additional 20 areas

OVGTSL May 2010 28



Most Frequent Format / Schema

- Print Monographs – 31
- Print Continuing Resources – 24
- Videorecordings – 23
- Ebooks – 22
- Electronic Continuing Resources – 20
- LC Classification – 20
- LCSH Subject analysis – 20

OVGTSL May 2010 30

Need Format and Schema Expertise

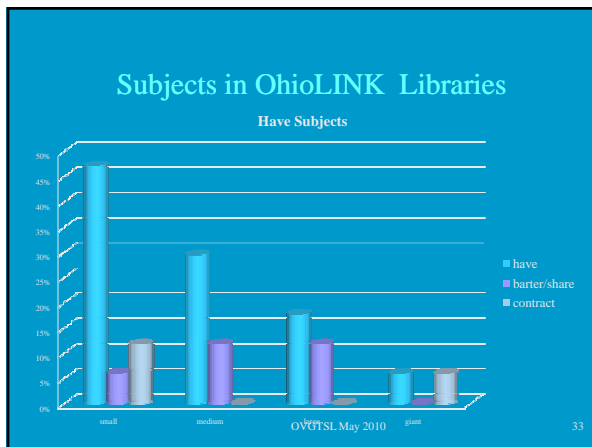
- 14 institutions indicated they needed format and schema expertise in 30 areas
- 59 format and schema entries in total
- 1 institution indicated it needed help with 23 different formats and schemas

OVGTSL May 2010 31

OhioLINK Libraries that had Subject Expertise

- 17 institutions indicated they had subject expertise in 27 subject areas
- 43 subject entries in total

OVGTSL May 2010 32



OhioLINK Libraries that Need Subject Expertise

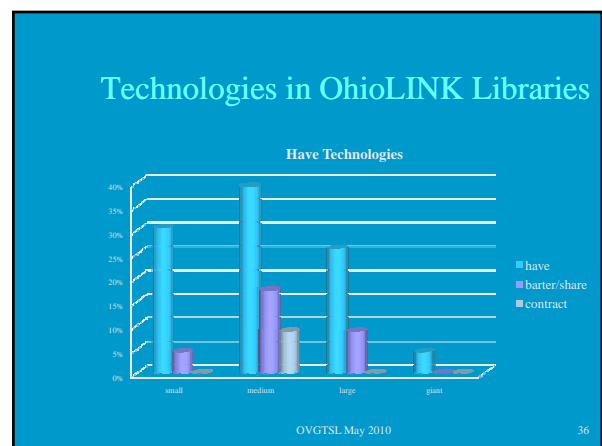
- Manga / Comic Book Literature

OVGTSL May 2010 34

OhioLINK Libraries that have Technological Expertise

- 23 institutions indicated they had technological expertise in 10 areas
- 100 technological entries in total

OVGTSL May 2010 35



Need Technological Expertise

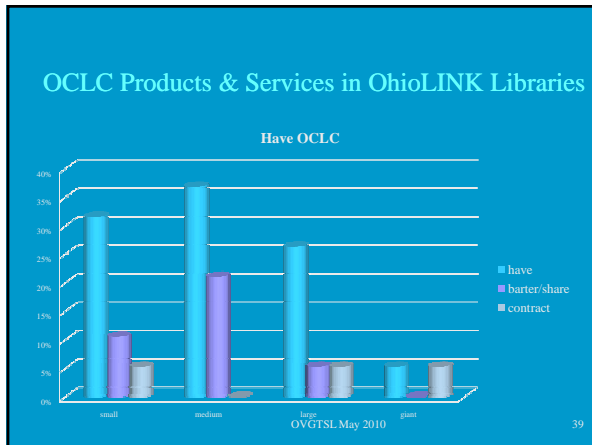
- 8 institutions indicated that they needed expertise in 10 unique technological areas
- 19 technological expertise entries in total
- Knowledge of ERM management and the use of Perl Scripts were most needed

OVGTSL May 2010 37

OhioLINK Libraries that Have Experience with OCLC Products and Services

- 19 institutions indicated they had expertise with 8 OCLC products and services
- 35 OCLC products and services entries in total

OVGTSL May 2010 38



Need OCLC Products and Services Expertise

- 6 institutions indicated they needed expertise with 4 OCLC products and services
- 13 OCLC product and service entries in total

OVGTSL May 2010 40

OhioLINK Library Participation in National Cataloging Programs

- 11 institutions indicated they participated in national cataloging programs:
 - NACO – 9
 - BIBCO – 4
 - CONSER – 1
 - SACO – 1
 - OCLC Regular Enhance – 8
 - OCLC National Enhance – 4

OVGTSL May 2010 41

Overall Willingness to Share

Area	Willing to Barter / Share	Willing to do on Contract	Not Willing to Share
Languages	45%	16%	39%
Format / Schema	16%	10%	74%
Subjects	37%	14%	49%
Technologies	18%	5%	77%
OCLC Products	43%	9%	49%

OVGTSL May 2010 42

Why are Some Things Easier to Share?

- Reluctance to take on other people's work if you're under the threat of being downsized
- Comfort levels for in-house versus do work for others
- What role do local practices play?
- Technology
- Everyone outsources something

OVGTSL May 2010 43

And what about those assumptions?

- That libraries in large schools were willing to help libraries in small schools, but small libraries willing to help others too.
- That specialized expertise did reside in large libraries—but sometimes in small & medium-sized ones

OVGTSL May 2010 44

Other findings

- That more libraries admitted to having expertise than admitted to needing it
- That smaller libraries also offered expertise
- Hard to say if collectively OhioLINK libraries had expertise in all areas

OVGTSL May 2010 45

Other findings

- That some libraries would also need less specialized subjects
- That libraries in national programs were not always the most likely to share their resources
- Libraries having expertise were more willing to share or barter than were willing to do work on contract

OVGTSL May 2010 46

OhioLINK Libraries and CollaboraTeS

- Foster collaboration among OhioLINK technical services departments
- Provide a set of supportive tools
 - Inventory of technical services expertise
 - Project models
 - Cost models
 - Memorandums of understanding


OVGTSL May 2010 47

Using the CollaboraTeS Web Page to Identify...

- Libraries that have expertise that is lacked locally
- Libraries that need expertise that is available locally
- Contact information
- Other supportive tools
- Links to research on other collaborations

OVGTSL May 2010 48

<http://platinum.ohiolink.edu/dms/collaborate/collaborates.htm>



OVGTSL May 2010 49

CollaboraTeS Working Groups

- Collaborates Technical Working Group
- Collaborates Marketing Working Group

OVGTSL May 2010 50

The CollaboraTeS Model and Other Libraries

- Limiting access to institution-specific information
- Providing access to other tools in the kit

OVGTSL May 2010 51

Questions?

<http://www.personal.kent.edu/~mbmaurer/BuildingtheInfrastructure.html>

- Margaret Maurer mbmaurer@kent.edu
- Barbara Strauss b.strauss@csuohio.edu
- Julie Gedeon jgedeon@kent.edu

OVGTSL May 2010 52