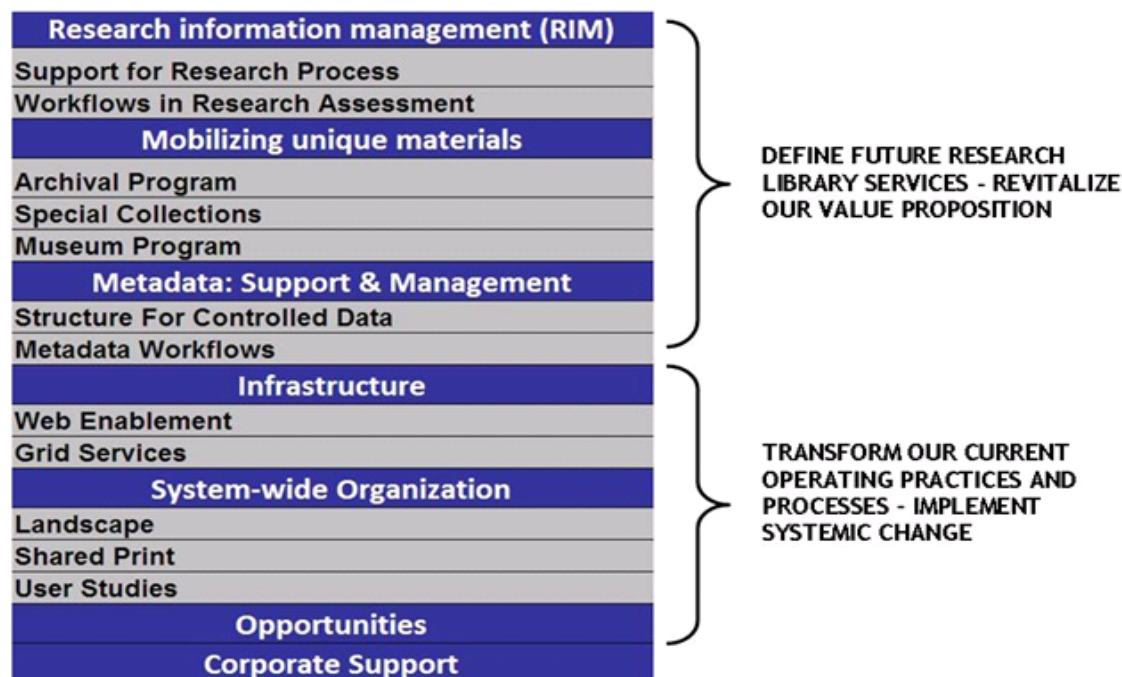


## OCLC Research Highlights: Progress in Support of the RLG Partnership July 2009 – March 2010

During the first nine months of FY10, OCLC Research staff provided leadership to a range of audiences, set out to produce new research in several high impact areas, and made considerable progress on collaborative initiatives undertaken to improve processes and increase efficiencies for libraries, archives and museums around the world.

We organize our effort around major themes where we can have impact on current operating processes and help research institutions define their future services.

Here we highlight the associated **Projects**, **Events**, **PUBLICATIONS** and working group **Participants** (Appendix A), that have advanced the RLG Partnership's goals.



This report supplies a progress report and road map of the ways in which OCLC Research is improving and ensuring the future of memory institutions themselves.

Please share this with your colleagues and also [let us know](#) how useful it is.

### Key to Project Codes

**RW** Some of the activities listed here have prototypes or demonstrations you can explore and play with. You can find a list of just those hands-on activities in [ResearchWorks](#).

**SW** A few of these activities have generated software that you can download and build upon. Go to our [software](#) page for a list of only those activities.

**RP** The [RLG Partnership](#) has sponsored the activities with this mark.

## RESEARCH INFORMATION MANAGEMENT (RIM)

We are exploring new prospects for adding value to the scholarly communication process, helping scholars get the most out of new technologies that can enhance the quality of their work, and helping academic institutions with the assessment of their research output. The dual objectives of our efforts in this area are to (1) reach a collective understanding of the responsibilities of, and opportunities for, libraries in a changed research environment and (2) help academic libraries play a more mission-critical role in support of the research process.

### Research Information Management Roadmap **RP**

This project involves issuing a provocative call to action, urging academic libraries to take a more significant role in their institution's mission to support research.

- Work Team Lead: John MacColl
- *Impact: The outcome of this activity is a manifesto that will serve as a wake up call to academic libraries that the status quo is not enough anymore. See **Publication #3** for the document produced by Chris Bourg, Ross Coleman and Ricky Erway.*

### Role of Libraries in Data Curation **RP**

Investigation of what is needed in order to be able to offer responsible management of locally-produced research data. This activity is just kicking off; its first initiative will be a joint OCLC Research and LIBER (Association of European Research Libraries) study of data curation needs in the humanities and social sciences in a range of university libraries in Europe and North America. This project will take a case-study approach.

- Work Team Lead: Ricky Erway
- *Impact: One desired outcome is to foster the emergence of data curation skills for librarians; another is to identify transnational best practice in the management of locally-produced research data.*

### Support for Research Workflows **RP**

OCLC Research and the UK's Research Information Network (RIN) are conducting a collaborative project to examine the use and provision of information-related tools and services to researchers throughout the lifecycle of the research process. The project will assess service provision across several disciplines in research-intensive universities.

- Work Team Lead: Jennifer Schaffner
- *Impact: The combined OCLC Research and RIN report will document the nature and scope of tools and services that researchers currently use, how effective these are in meeting researchers' needs, and whether there are unmet needs. Our analysis of case studies will help identify intersections and gaps among services provided by various on-campus entities, consortia and commercial endeavours. The report will provide examples of good practice, recommend areas where new practice might emerge, and identify possible areas and scope for collaboration within and between institutions. Comparing national academic practices will provide evidence and encourage coordination to meet the needs of academic research internationally.*

*(NB - This project will not seek to replicate recent and current studies of the behavior of researchers themselves in locating, evaluating, organizing, managing, transforming and communicating in the course of their research; rather, it will focus on support services and how effective they are in meeting researchers' needs.)*

### Survey of Current Practice in Research Assessment RP

This was a study of the role of research libraries in the higher education research assessment regimes in five countries.

- Work Team Lead: Ricky Erway
- *Impact: This report – based upon information from key institutional players in countries with university systems heavily dependent on public funding – helps establish the contours of a new set of responsibilities that is emerging for research libraries. Information on how libraries are engaged in research assessment in these five different regimes helps libraries and their host universities to move in the direction of settled good practice.*

### Testing the Desirability of Research Services RP

A list of research support services will be tested with researchers to learn how well their needs are being met.

- Work Team Lead: Ricky Erway
- *Impact: Learning directly from researchers as to how their needs are being met for services in support of their research processes will help academic libraries prioritize their efforts. If gaps are identified, they can be addressed. If others are providing some adequate services, our efforts can be directed elsewhere. Learning the intersections of service providers will help us collaborate to provide seamless support.*

### The NDLTD Union Catalog RW

The Networked Digital Library of Theses and Dissertations (NDLTD) Union Catalog project focuses on thesis metadata via the Open Archives Initiative's Protocol for Metadata Harvesting (OAI-PMH). This is a lightweight protocol for moving or sharing metadata that allows synchronization of loosely coupled databases and mandates XML Dublin Core as the default metadata format.

- Work Team Lead: Thomas Hickey
- *Impact: The records are available for harvest and local use in order to promote the use of theses and dissertations in teaching and learning. The services that can be built with OAI-PMH are now well understood.*

## MOBILIZING UNIQUE MATERIALS

We're working to bring about greater collaboration among libraries, archives and museums by surfacing models for sharing data, services and expertise. Our objective in this area is to achieve economies and efficiencies that permit the unique materials in libraries, archives and museums to be effectively described, properly disclosed, successfully discovered and appropriately delivered. This includes:

- introducing cooperative models of acquiring, managing and disclosing collections
- helping libraries, archives and museums achieve a common understanding of the processes for which they should be responsible
- demonstrating these new frameworks through prototypes, and
- enabling them through open source code and architectures

### Analyze Archival Descriptive Practice RP

Data mining of the one million MARC records for archival materials in WorldCat will provide a systemwide overview of descriptive practice and enable recommendations for more effective description and discovery.

- Work Team Lead: Jackie Dooley

- *Impact: Providing institutions with a system-wide view of archival collection descriptions will provide new data for decision making. Changes in descriptive practice could be informed by an understanding of how existing norms have been applied. Change could be further informed by evaluating descriptive norms against what is valued and necessary for discovery and delivery.*

### Analyze Evidence of Archival Discovery **RP**

Collect query logs, Web logs, and various Web analytics; evaluate their usefulness for research about how researchers use archival cross-searching networks and other tools that archives use to publish their finding aids.

- Work Team Lead: Jennifer Schaffner
- *Impact: Synthesized patterns of successful search terms can be combined with research on data elements in order to recommend strategies to (1) mitigate current limitations in locating archival collections and (2) align finding behaviours with users' desires.*

### Barriers to Using EAD **RP**

Despite the fact that Encoded Archival Description (EAD) has been in use since 1998, there are still significant barriers to the effective implementation of the standard. This project's purpose was to identify those barriers and suggest practical suggestions for surmounting those obstacles.

- Work Team Lead: Merrilee Proffitt
- *Impact: The report of this work was recently published (see **Publication #4**); in it, the authors suggest a number of tools and techniques to remove barriers that have been well-articulated in the archival literature. Institutions that have lagged behind their colleagues may now find a set of "solutions...and strategies [that] will be helpful and will smooth the way to successful implementation."*

### Develop a Holistic Approach to Archival Collections Assessment **RP**

This activity looks at existing archival collections assessment activities across institutions, puts them into context, and makes recommendations for best practice.

- Work Team Lead: Merrilee Proffitt
- *Impact: Standard or "best" practice regarding collections assessment, including its methodologies and deliverables, will make it easier for institutions of all types to undertake collections assessments. It will also enable aggregation of information across and among institutions.*

### Introduce Balance in Rights Management **RP**

This project attempts to mitigate the risk aversion that is related to rights management and special collections, often interfering with our mission of providing access to those collections. An invitational seminar, broadcast in real time, collected imaginative thinking by experts from archives, special collections and the law. The seminar concluded with a discussion of what was termed "well-intentioned practice." OCLC Research staff, with input from speakers and advisors, drafted a reasonable approach to balancing risk and access when making collections of unpublished materials accessible online. That draft document was improved by participants in the seminar and is currently being shared with other organizations in hopes of attracting endorsement and widespread acceptance. See the Undue Diligence Web page for complete details and a link to the draft document.

- Work Team Lead: Ricky Erway
- *Impact: Developing streamlined, community-accepted procedures will establish a community of practice that will cut costs and boost confidence in our ability to increase visibility of and access to unpublished materials.*

### Library, Archive and Museum Collaboration **RP**

This initiative is a long-term investigation into the incentives and strategies for deep and transformative collaboration among libraries, archives and museums (or LAMs). Presentations and events in the US and UK, as well as articles and blog posts, have expanded on the structures, challenges and benefits of transformative collaboration. (See **Publications #28, #29 and #30.**) OCLC Research and an RLG Partnership planning committee are now designing a two-day event on strategies for effective collaboration that will be hosted by the Smithsonian Institution in Washington, D.C, 20-21 September.

- Work Team Lead: Günter Waibel
- *Impact: Although the type of materials may differ, and professional practices vary, LAMs share an overlapping set of functions. Fulfilling these functions in collaboration rather than isolation creates a win-win solution for users and institutions.*

### Missing Materials Beta Procedure **RW RP**

In order to centralize information about stolen and missing rare books and special collections, this working group developed a procedure to “tag” records in WorldCat.org. The tagged records are then automatically fed to a blog, [missingmaterials.org](http://missingmaterials.org). Simultaneously, holdings are set in WorldCat, in order to alert prospective buyers and sellers.

- Work Team Co-Leads: Jennifer Schaffner and Eric Childress
- *Impact: Rare book and special collections communities—including both institutions and the trade—enthusiastically endorse complete transparency concerning loss and theft of valuable rare books and special collections.*

### Museum Data Exchange **RP**

This project created successful tools supporting standards-based data sharing in the museum community, and has provided insights into the characteristics of large aggregations of museum descriptions. A final project report was submitted recently to The Andrew W. Mellon Foundation; a published version of the report is listed in this document (see **Publications #26 and #27**).

- Work Team Lead: Günter Waibel
- *Impact: Standards-based museum records drive an increasing number of processes, such as submitting data to aggregators like ARTstor or ArtsConnectEd, etc. A suite of shared and adaptable tools makes these activities economically feasible, and allows them to scale.*

### Sharing Special Collections **RP**

Streamlining procedures for successful delivery of rare and unique materials to users will maximize use of increasingly limited staff and financial resources.

- Work Team Lead: Dennis Massie
- *Impact: Streamlining procedures for successful delivery of rare and unique materials to users will maximize use of increasingly limited staff and financial resources. By following best practices, minimizing risk, and trusting community standards, librarians and archivists can deliver their collections to far-flung users while making the collections more visible and useful.*

### Streamlining Photography and Scanning **RP**

This working group is addressing workflow and policy issues arising from digitizing (and copying) materials from special collections. A report was recently published that focuses on the use of digital cameras in special collections’ reading rooms (see **Publication #19**).

- Work Team Lead: Jennifer Schaffner

- *Impact: Revisiting policies and methods for scanning and other reproductive services can encourage improvements, both in efficient use of staff time and in more effective use of special collections. The images themselves, whether made by staff or by patrons, can populate a digital library and be reused, further improving delivery of collections for use.*

### Survey on Special Collections and Archives **RP**

A detailed survey of more than 300 special collections and archives in academic and research libraries throughout the United States and Canada will identify norms across the community as well as define needs for community action and further research.

- Work Team Lead: Jackie Dooley
- *Impact: The data will effectively support decision-making for strategic priorities and collaborative projects. Individual libraries will be able to place themselves in the context of relative norms across the community.*

## METADATA SUPPORT & MANAGEMENT

Our work in this area is focused on setting new expectations for investing in metadata creation and maintenance, modeling attendant workflows and facilitating the discovery of research institutions' resources by users wherever they are. Our goal is to engage RLG partners and OCLC member libraries in adapting descriptive practice to economic realities, user expectations and the requirements of network-level services.

### Classify **RW**

Classify is a FRBR-oriented, Web-based prototype designed to support the assignment of classification numbers and subject headings for books, DVDs, CDs, and other types of materials. It is intended to be accessible through either a user interface or a machine-to-machine service.

- Work Team Lead: Diane Vizine-Goetz
- *Impact: The automation of processes previously understood to be possible only through human intervention will have positive impacts on financial, workflow and resource issues.*

### FAST (Faceted Application of Subject Terminology) **RW**

FAST is an enumerative faceted subject heading schema derived from the Library of Congress Subject Headings (LCSH). FAST is easier to apply and can be successfully used by non-professionals.

- Work Team Lead: Ed O'Neill
- *Impact: FAST provides an efficient indexing schema extending which permits the use of a controlled vocabulary in environments where staffing and costs considerations previously were limited to key word indexing or other uncontrolled approaches.*

### Gather Evidence to Inform Changes in MARC Metadata Practices **RP**

New research was conducted to provide evidence to inform possible changes in MARC metadata practices that could lead to better user access to the collective collection. The results of the analysis done on WorldCat and union catalogs in Australia, Canada, and UK led to identifying factors to consider when making decisions about local MARC metadata practices. The lack of some evidence led to developing a list of requirements for enhanced library data mining. A report was recently published (see **Publication #24**) that articulates a range of implications for library descriptive practice.

- Work Team Lead: Karen Smith-Yoshimura

- *Impact: The working group's analysis and recommendations will help information professionals who create MARC metadata focus on key elements needed to link their records with other resources for the same work.*

### Identify Requirements for a Cooperative "Identities Hub" RP

Develop use case scenarios for academic libraries and scholars, archivists and archival users, and institutional repositories describing their needs to uniquely identify and distinguish persons and organizations, then define the characteristics, functions, and data attributes of a cooperative "Identities Hub."

- Work Team Lead: Karen Smith-Yoshimura
- *Impact: The list of data attributes and functions defined for a "cooperative Identities Hub" can serve as a checklist for all services designed to uniquely identify and distinguish persons and organizations. (It has already been used as a reference for the Names Project in the UK, the Encoded Archival Context ? Corporate Bodies, Persons, and Families, and the NISO Institutional Identifiers working group.)*

### Metadata Schema Transformation Services RW

The initial goal of the Metadata Schema Transformation project was to develop a simple, Web-accessible service that translates metadata records from one publicly defined format into another. That goal has been achieved and the Crosswalk Web Service is now in full production. (See **Publication #12**, among others.) Next steps include: (1) create an instance of the Crosswalk Web Service that converts authorities metadata and (2) design and implement utilities that interact with the Crosswalk Web service to manage ephemeral process data and convert from one data encoding to another.

- Work Team Lead: Jean Godby
- *Impact: In addition to the research results reported in our presentations and publications, the Crosswalk Web Service is now a production system that has been incorporated into a number of OCLC products and services.*

### Name Extraction

This project attempts to develop tools that advance the state of the art in extracting names from unstructured text and disambiguating them using authority files developed in the library community.

- Work Team Lead: Jean Godby
- *Impact: This project will help bridge the gap between collections of unstructured text and structured metadata, which will enable many kinds of library applications to be linked.*

### Publisher Name Server

An experimental service to provide authority control for publisher names in bibliographic catalogs.

- Work Team Lead: Lynn Silipigni Connaway
- *Impact: This project will benefit acquisitions, collection analysis, and data mining projects.*

### Sharing and Aggregating Social Metadata RP

Identify the user contributions that would enrich the descriptive metadata created by libraries, archives, and museums and the issues that need to be resolved to communicate and share user contributions on the network level.

- Work Team Lead: Karen Smith-Yoshimura

- *Impact: The working group recommendations will help libraries, archives, and museums determine how best to invest resources to take full advantage of user contributions and the factors that lead to successful outreach to targeted communities.*

### Terminology Services RW

This project provides Web-based services for controlled vocabularies.

- Work Team Lead: Diane Vizine-Goetz
- *Impact: The services may be used in a variety of ways. Some examples are as a source of terms for social tagging, for query refinement in search applications, to provide context for a search term, and to validate names and subjects in metadata*

### VIAF (The Virtual International Authority File) RW

VIAF explores virtually combining the name authority files of national level authority files into a single name authority service.

- Work Team Co-Leads: Thom Hickey and Ed O'Neill
- *Impact: The goal of this project is to facilitate research across languages anywhere in the world by making authorities truly international.*

### Work Records in WorldCat RW

View rich descriptions for books and other library materials.

- Work Team Lead: Diane Vizine-Goetz

### WorldCat Identities RW

WorldCat Identities has a summary page for every name (real or imaginary) in WorldCat.

- Work Team Lead: Thom Hickey

## INFRASTRUCTURE AND STANDARDS SUPPORT

Our work here focuses on participating with research institutions and OCLC member libraries in the development of needed architecture and standards, supporting their adoption and finding appropriate venues for their sustenance. Our objective is to create an efficient environment in support of the declared activities associated with infrastructure and standards support.

### Grid Services and the OCLC WorldCat Developer Network

The OCLC Developer Network is a community of developers collaborating in a "sandbox" environment in order to propose, discuss and test [OCLC Web Services](#). This open source, code-sharing infrastructure improves the value of OCLC data for all users by encouraging new OCLC Web Service uses. A wiki and a blog are actively used to support interactions among participants. There are also a variety of events (e.g., mashathons, demos) around the world, drawing in developers from a wide range of institutions (see the [Events](#) pages for details).

- Work Team Members Include: Don Hamparian, Roy Tennant, Ralph LeVan, Bruce Washburn
- *Impact: The Developer Network will help shape the future of OCLC Web Services, improve the quality and interoperability of current and proposed services, share software code with other network members and the community-at-large in an open source environment and provide feedback OCLC and the wider library community.*

### [Influence Proposed EAC Standard](#) **RP**

Facilitate refinement, publication and dissemination of EAC.

- Work Team Lead: Jennifer Schaffner

### [info URI Registry](#) **RW**

The “info” URI Registry was set up on behalf of NISO to identify and describe registered “info” URIs.

- Work Team Lead: Thom Hickey

### [OAI Cat](#) **RW SW**

OAI Cat is a Java Servlet implementation of the Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH) v2.0.

- Project Lead: Jeff Young

### [PREMIS Maintenance Activity and Editorial Committee](#)

OCLC Research participates in both the PREMIS Maintenance Activity and Editorial Committee. The Maintenance Activity is responsible for planning, organizing, and coordinating work and activities related to the PREMIS Data Dictionary for Preservation Metadata. The PREMIS Editorial Committee has specific responsibility for managing the Data Dictionary, including supporting its use and coordinating future updates and revisions.

- Project Lead: Brian Lavoie

### [PURL](#) **RW SW**

PURLs (Persistent Uniform Resource Locators) are Web addresses that act as permanent identifiers in the face of a dynamic and changing Web infrastructure.

- Project Lead: Jeff Young

### [SRW/U](#) **SW**

The SRW/U Open Source project offers software that implements both the SRW Web Service and the SRU REST model interface to databases. Included are interfaces that support DSpace and Lucene implementation and OCLC's Pears database.

- Project Lead: Ralph LeVan

## [SYSTEM-WIDE ORGANIZATION](#)

Our objective here is to use our perspective and data to understand, prepare for and help libraries, archives and museums advance through utilizing cooperative models of acquiring, managing, disclosing and preserving collections.

### [Blue Ribbon Task Force on Sustainable Digital Preservation and Access](#)

The Task Force defined the conditions necessary to achieve economically sustainable digital preservation activities, identified key challenges in meeting these conditions across a range of preservation contexts, and developed practical guidelines and recommendations to aid decision-makers in overcoming these challenges as they shape their sustainability strategies. The final report (see **Publication #2**) was issued recently and invitational symposia have been organized for Washington, DC and London (see **Events**).

- Co-chaired by Brian Lavoie and Fran Berman (RPI)
- *Impact: The outcome of this activity was a final report, published in February 2010 that describes the task force's findings and recommendations. The report is*

*expected to be both a resource of immediate use to preservation decision-makers, and a foundation for further work in this area.*

### **Books as Expressions of Global Cultural Diversity**

This data mining project seeks patterns in the worldwide book publishing industry, as reflective of different cultures' literary heritage. It stems from UNESCO interest in statistical traces of cultural diversity.

- Work Team Lead: Timothy Dickey
- *Impact: These results will provide a global overview of the transnational literary arts, and a wealth of case studies in single countries' practices in both literary publishing and the preservation of their literary heritage.*

### **Deaccession Materials Held in Print and Electronic Form** RP

This work seeks to establish best practice for the disposition of print journals available in electronic form – i.e. when it is most appropriate to retain print back files on campus, when to store offsite, and when to deaccession entirely.

- Work Team Lead: Dennis Massie
- *Impact: Libraries acting in concert when deciding what to do with print e-journal back files will result in considerable space and cost savings and also help ensure that the appropriate number of print copies are preserved.*

### **Define Policy and Infrastructure Requirements for Shared Print** RP

This work aims to characterize the generic business requirements for managing physical research library collections as a shared network resource.

- Work Team Co-Leads: Constance Malpas and Dennis Massie  
Work Teams:
  - 'Cloud Library' Working Group, Team Lead: Constance Malpas
  - 'MARC 583 for Print Archiving' Working Group, Team Lead: Constance Malpas
  - Shared Print Collections Coordinating Committee, Team Co-Leads: Malpas & Massie
- *Impact: Empirical study of the requirements needed to sustain long-term business partnerships and operational workflows between academic libraries and shared collection service providers will result in improved understanding of costs, benefits and likely time horizon for implementation of Web-scale management services.*

### **User Behavior Studies & Synthesis**

Our focus in this area includes studying the behavior of library users, from public library patrons and undergraduate students to scholars and researchers, to determine their perceptions and information usage habits of a variety of reference services. Our objective is to identify and share recommendations on how to better serve library users' needs now and in the future.

### **Seeking Synchronicity: Evaluating Virtual Reference Services**

This project includes the evaluation, sustainability, and relevance of virtual reference services, which are human-mediated, Internet-based library information services. The study of VRS users, non-users, and librarians provided a fuller understanding of their behaviors, needs, and preferences in virtual environments, in order to improve libraries' ability to respond to increased demand on libraries to provide reference services online.

- Work Team Lead: Lynn Silipigni Connaway

## Upcoming Events

Date	Event	Location
22-23-Apr-10	<b>Meeting:</b> 2010 RLG Partnership European Mtg	Oxford, UK
29-Apr-10	<b>TAI CHI Webinar Series:</b> Mobile Development. Bruce Washburn. (TAI CHI = Technical Advances for Innovation in Cultural Heritage Institutions)	Broadcast internationally from OCLC San Mateo, CA and Dublin, OH
6-May-10	<b>Webinar:</b> Greening ILL. Dennis Massie	Broadcast internationally from OCLC San Mateo, CA and Dublin, OH
13-May-10	<b>Mashathon UK</b> - OCLC WorldCat Developer Network - <a href="http://www.worldcat.org/devnet/wiki/2010ukmashathon">http://www.worldcat.org/devnet/wiki/2010ukmashathon</a>	Liverpool, UK
20-May-10	<b>Webinar:</b> Economics of Sustaining Digital Information. Brian Lavoie.	Broadcast internationally from OCLC HQ
27-May-10	<b>Webinar:</b> Linked Data. Ralph LeVan	Broadcast internationally from OCLC HQ
9-11-Jun-10	<b>Meeting:</b> 2010 RLG Partnership Annual Meeting	Chicago
24-30-Jun-10	<b>Meetings</b> for RLG Partnership and OCLC Membership at ALA Annual.	Washington, DC
15-July-10	<b>TAI CHI Webinar Series:</b> OCLC Web Services. Karen Coombs (TAI-CHI = Technical Advances for Innovation in Cultural Heritage Institutions)	Broadcast internationally from OCLC San Mateo, CA and Dublin, OH
20-21-Sep-10	<b>Meeting:</b> Collaboration Forum at the Smithsonian	Washington, DC

## Past Events

Date	Event	Location
29-Mar-10	<b>Webinar:</b> Single Search. Moderated by Günter Waibel; presenters include Michael Fox (MHS), Emmanuelle Delmas-Glass (Yale Center for British Art) and Ching-Hsien Wang, Smithsonian Institution.	Broadcast internationally from OCLC San Mateo, CA and Dublin, OH
18-Mar-10	<b>Webinar:</b> Implications of MARC Tag Usage on Library Materials; presenters include Catherine Argus (National Library of Australia), Lisa Rowlinson de Ortiz (UC Berkeley), Chew Chiat Naun (U Minnesota), Karen Smith-Yoshimura (OCLC Research) and Timothy Dickey (OCLC Research).	Broadcast internationally from OCLC San Mateo, CA and Dublin, OH
11-Mar-10	<b>Meeting and Webinar:</b> Undue Diligence: Seeking Low-risk Strategies for Making Collections of Unpublished Materials More Accessible. Merrilee Proffitt, Ricky Erway, Jennifer Schaffner plus 6 copyright experts and commentators: Michele Combs (Syracuse U), Aprille Cooke McKay (U Michigan), Maaggie Dickson (NC State U), Rebekah Irwin (Yale), Sharon Farb (UCLA), and Peter Hirtle (Cornell).	Meeting held at OCLC San Mateo and broadcast internationally from OCLC HQ

## Past Events (cont.)

Date	Event	Location
4-Mar-10	<b>Webinar:</b> Over, Under, Around, and Through: Getting Around Barriers to EAD Implementation; presenters include Michele Combs (Syracuse U), Mark A. Matienzo (Yale), Lisa Spiro (Rice U), Merrilee Proffitt (OCLC Research)	Broadcast internationally from OCLC San Mateo, CA and Dublin, OH
22-Feb-10	<b>MiniMashathon</b> - WorldCat Developer Network at Code4lib - also OCLC Web Services and Lightning Talk Demos - <a href="http://www.worldcat.org/devnet/wiki/C4lib">http://www.worldcat.org/devnet/wiki/C4lib</a>	Asheville, NC
8-Feb-10	<b>VALA Bootcamp/Mashathon</b> - WorldCat Developer Network - <a href="http://www.worldcat.org/devnet/wiki/2009WAMashathon">http://www.worldcat.org/devnet/wiki/2009WAMashathon</a>	Melbourne, Australia
15-18-Jan-10	<b>Meetings</b> for RLG Partnership and OCLC Membership at ALA Midwinter.	Boston, MA
7-Jan-10	<b>Webinar:</b> RLG Partnership Update with OCLC Research staff Merrilee Proffitt, Dennis Massie, Constance Malpas, Brian Lavoie, Ricky Erway, Jackie Dooley, John MacColl, Stu Weibell, Karen Smith Yoshimura.	Broadcast internationally from OCLC San Mateo, CA, Seattle, WA, Dublin, OH and St Andrews, UK
8-Dec-09	<b>TAI CHI Webinar Series:</b> Omeka. Bruce Washburn (OCLC Research) with Sheila Brennan (Omeka End User Outreach Coordinator) and Dave Lester (Omeka Developer Outreach Coordinator). (TAI CHI = Technical Advances for Innovation in Cultural Heritage Institutions)	Broadcast internationally from OCLC San Mateo, CA and Dublin, OH
19-Nov-09	<b>OCLC Research Distinguished Seminar Series</b> presents, "Memento: Time Travel for the Web," with Herbert Van de Sompel from Los Alamos National Laboratory	Broadcast internationally from OCLC HQ
9-Oct-09	<b>OCLC Research Distinguished Seminar Series</b> presents, "Finding the Phoenix: Feathers, Flight and the Future of Libraries," with Helene Blowers from the Columbus Metropolitan Library	Broadcast internationally from OCLC HQ
8-Oct-09 and 3-Nov-09	<b>Webinars:</b> Encoded Archival Context - Corporate Bodies, Persons and Families; include presentations by Katherine Wisser (Chair of Int'l EAC WG), Basil Dewhurst (member, EAC WG) and Daniel Pitti (EAC Schema Chief Architect).	Broadcast internationally from OCLC San Mateo, CA and Dublin, OH
5-6-Nov	<b>Mashathon</b> - WorldCat Developer Network <a href="http://www.worldcat.org/devnet/wiki/2009WAMashathon">http://www.worldcat.org/devnet/wiki/2009WAMashathon</a>	Seattle, WA
23-Sep-09	<b>OCLC Research Distinguished Seminar Series</b> presents, "Approaching an Entity Crisis: Reconceiving Research Libraries in a Multi-institutional Context," with Anne R. Kenney from Cornell University	Broadcast internationally from OCLC HQ

## Past Events (cont.)

Date	Event	Location
18-Sep-09	<b>Meeting:</b> 2009 RLG Partnership European Mtg with OCLC Research staff: John MacColl (European Director), Lynn Silipigni Connaway (Senior Research Scientist), Ricky Erway (Senior Program Officer), Merrilee Proffit (Senior Program Officer). Held at the University of Leeds.	Leeds, UK
15-Sep-09	<b>Meeting:</b> CILIP Executive Briefing: Beyond the Silos of the LAMs. (CILIP = Chartered Institute of Library and Information Professionals)	London, UK
26-Aug-09	<b>TAI CHI Webinar Series:</b> Library à la Carte. Bruce Washburn (OCLC Research) with Jane Nichols (Subject Librarian, Oregon State U) and Kim Griggs (Programmer, Oregon State U). (TAI CHI = Technical Advances for Innovation in Cultural Heritage Institutions)	Broadcast internationally from OCLC San Mateo, CA and Dublin, OH
23-Jul-09	<b>OCLC Research Distinguished Seminar Series</b> presents, "MultiMatch: Providing Multilingual/Multimedia Access to Cultural Heritage Content "	Broadcast internationally from OCLC HQ
21-Jul-09	<b>Webinar:</b> Networking Names. Karen Smith-Yoshimura and Thom Hickey (OCLC Research) and Suzanne Pilak (Smithsonian), Amanda Hill (U Manchester), Dennis Meissner (Minnesota Historical Society), Grace Agnew (Rutgers).	Broadcast internationally from OCLC HQ
10-13-Jul-2009	<b>Meetings</b> for RLG Partnership and OCLC Membership at ALA Annual	Chicago

## Publications – 1 July 2009 through 31 March 2010

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## Appendix A: Working Group Participants

### [Research Information Management Roadmap](#)

Work Team Lead: John MacColl

Team Members:

Susan Ashworth, University of Glasgow  
Chris Bourg, Stanford University, **Chair**  
Niamh Brennan, Trinity College Dublin  
Elizabeth Brown, Binghamton University, State University of New York  
Sheila Cannell, University of Edinburgh  
Ross Coleman, University of Sydney  
Robin Green, University of Warwick  
Geneva Henry, Rice University  
Allen Jones, The New School University  
Rebecca Kennison, Columbia University  
MJ Romaniuk, University of Alberta  
Sally Rumsey, University of Oxford  
Anna Shadbolt, University of Melbourne

### [Role of Libraries in Data Curation](#)

Work Team Lead: Ricky Erway

Team Members:

Jeff Belliston, Brigham Young University  
Niamh Brennan, Trinity College Dublin  
Elizabeth Brown, Binghamton University, State University of New York  
Rowan Brownlee, University of Sydney  
Faye Chadwell, Oregon State University  
Patricia Cruse, California Digital Library  
Robin Green, University of Warwick  
Allen Jones, The New School University  
MJ Romaniuk, University of Alberta  
Sally Rumsey, University of Oxford  
Anna Shadbolt, University of Melbourne

### [Support for Research Workflows](#)

Work Team Lead: Jennifer Schaffner

Team Members:

John MacColl, OCLC Research  
Ricky Erway, OCLC Research  
The Research Information Network (RIN)  
CIBER  
Susan Kroll  
Rick Forsman

## Survey of Current Practice in Research Assessment

Work Team Lead: Ricky Erway

Team Members:

Michael Jubb, Director, UK Research Information Network  
Colin Steele, Emeritus Fellow, Division of Information, The Australian National University  
Keith Jeffery, Director Information Technology & International Strategy, UK Science and Technology Facilities Council  
Ross Coleman, Director, Sydney eScholarship, University of Sydney Library  
John T. Butler, Associate University Librarian for Information Technology, University of Minnesota Libraries  
Rick Luce, Vice Provost and Director of Libraries, Emory University  
Chris Armbruster, Research Associate, Max Planck Digital Library/Executive Director, Research Network 1989

## Testing the Desirability of Research Services

Work Team Lead: Ricky Erway

Team Members:

Susan Ashworth, University of Glasgow  
Jeff Belliston, Brigham Young University  
Niamh Brennan, Trinity College Dublin  
Martha Brogan, University of Pennsylvania  
Sten Christensen, University of Sydney  
Judy Gardner, Rutgers University  
Robin Green, University of Warwick, **Chair**  
Leah Krevit, Rice University  
Zack Lane, Columbia University  
Virginia Shih, University of California, Berkeley

## The NDLTD Union Catalog

Work Team Lead: Thomas Hickey

Team Members:

Jeff Young, OCLC Research  
Tom Dehn, OCLC Research

## Analyze Archival Descriptive Practice

Work Team Lead: Jackie Dooley

Team Members:

Bruce Washburn, OCLC Research  
Shailen Karur, OCLC Research

## Barriers to Using EAD

Work Team Lead: Merrilee Proffitt

Team Members:

Michele Combs, Syracuse University

Mark Matienzo, New York Public Library  
Lisa Spiro, Rice University

### Develop a Holistic Approach to Archival Collections Assessment

Work Team Lead: Merrilee Proffitt

Team Members:

Martha Conway, University of Michigan  
David DeLorenzo, University of California, Berkeley  
Christine Di Bella, Institute of Advanced Study  
Sarah Stauderman, Smithsonian Institution

### Introduce Balance in Rights Management

Work Team Lead: Ricky Erway

Team Members:

Joanne Archer, University of Maryland  
Jeanne Boyle, Rutgers University  
Eli Brown, Cornell University  
Sharon Farb, University of California at Los Angeles  
Elizabeth Smart, Brigham Young University  
Jenny Watts, Huntington Library  
Diane Zorich (Museum Consultant)  
Merrilee Proffitt and Jennifer Schaffner, OCLC Research

### Missing Materials Beta Procedure

Work Team Co-Leads: Jennifer Schaffner and Eric Childress

Team Members:

Kenneth Karmiole, Bookseller, Inc., Antiquarian Booksellers' Association of America  
David Szewczyk, Philadelphia Rare Books and Manuscripts, Antiquarian Booksellers' Association of America  
Richard Oram (Chair, ALA Rare Books & Manuscripts Section Security Committee)  
and Ryan Hildebrand, Harry Ransom Humanities Research Center, University of Texas at Austin  
Detectives Don Hrycyk and Stephanie Lazarus, Los Angeles Police Department  
Susan Allen and Andra Darlington, Getty Research Institute  
Susan Pyzynski, Houghton Library, Harvard University  
E.C. Schroeder and Ellen Ellickson, Beinecke Library, Yale University  
Laura Stalker, Dorothy Auyong and David Zeidberg, Huntington Library

### Museum Data Exchange

Work Team Lead: Günter Waibel

Team Members:

Holly Witchey, Cleveland Museum of Art  
Doug Hiwiler, Cleveland Museum of Art  
Jeff Steward, Harvard Art Museum

Shyam Oberoi, Metropolitan Museum of Art  
Piotr Adamczyk, Metropolitan Museum of Art  
Andrew David, Minneapolis Art Institute  
Peter Dueker, National Gallery of Art  
Greg Spurgeon, National Gallery of Canada  
Sonya Dumais, National Gallery of Canada  
Cathryn Goodwin, Princeton University Art Museum  
Alexander Macfie, Victoria & Albert Museum  
Tim Speevack, Yale University Art Gallery  
Thomas Raich, Yale University Art Gallery

### [Sharing Special Collections](#)

Work Team Lead: Dennis Massie

Team Members:

Jennifer Block, Princeton University  
Scott Britton, University of Miami  
Eleanor Brown, Cornell University  
Laura Carroll, Emory University  
Paul Constantine, University of Washington  
Barbara Coopey, Pennsylvania State University  
Margaret Ellingson, Emory University  
Cristina Favretto, University of Miami  
Sue Hallgren, University of Minnesota  
Aimee Lind, Getty Research Institute  
Elizabeth Nielsen, Oregon State University  
Sandra Stelts, Pennsylvania State University  
Shannon Supple, University of California, Berkeley, Boalt Law Library

### [Streamlining Photography and Scanning](#)

Work Team Lead: Jennifer Schaffner

Team Members:

Eleanor Brown, Cornell University  
Paul Constantine, University of Washington  
Gordon Daines, Brigham Young University  
Tiah Edmunson-Morton, Oregon State University  
David Farneth, Getty Research Institute  
Cristina Favretto, University of Miami  
Steven Galbraith, Folger Shakespeare Library  
Susan Hamson, Columbia University  
Sue Kunda, Oregon State University  
Jennie A. Levine, University of Maryland  
Dennis Massie, OCLC Research  
Dennis Meissner, Minnesota Historical Society  
Liz McAllister, University of Maryland  
Lisa Miller, Hoover Institution Library and Archives, Stanford University

Timothy Pyatt, Duke University  
Jennifer Schaffner, OCLC Research  
Shannon Supple, Robbins Collections, UC Berkeley  
Francine Snyder, Solomon R. Guggenheim Museum  
Mattie Taormina, Stanford University  
Cherry Williams, Lilly Library, Indiana University

### Survey on Special Collections and Archives

Work Team Lead: Jackie Dooley

Team Members:

Katherine Luce, Research Intern  
Merrilee Proffitt, Senior Program Officer

### Classify

Work Team Lead: Diane Vizine-Goetz

Team Members:

Harry Wagner, OCLC Research  
JD Shipengrover, OCLC Research

### FAST (Faceted Application of Subject Terminology)

Work Team Lead: Ed O'Neill

Team Members:

Lois Mai Chan, University of Kentucky  
Rebecca Dean, UCLA  
Rick Bennett, OCLC Research  
Eric Childress, OCLC Research  
Kerre Kammerer, OCLC Research  
Chris Stanton, OCLC Research  
Diane Vizine-Goetz, OCLC Research

### Gather Evidence to Inform Changes in MARC Metadata Practices

Work Team Lead: Karen Smith-Yoshimura

Team Members:

Catherine Argus, National Library of Australia  
John Chapman, University of Minnesota  
Naun Chew, University of Minnesota  
Peter Hirsch, New York Public Library  
Paul Priebe, University of California, Los Angeles  
Lisa Rowlison de Ortiz, University of California, Berkeley  
Hugh Taylor, University of Cambridge  
Mary Beth Weber, Rutgers University

### Identify Requirements for a Cooperative "Identities Hub"

Work Team Lead: Karen Smith-Yoshimura

Team Members:

Grace Agnew, Rutgers University  
Laura Akerman, Emory University  
Genevieve Clavel, Swiss National Library  
Joan Cobb, Getty Research Institute  
Michele Crump, University of Florida  
Amanda Hill, University of Manchester, Names Project  
Deborah Kempe, The Frick Collection and Frick Art Reference Library  
Amy Lucker, New York University, Fine Arts  
Dennis Meissner, Minnesota Historical Society  
Suzanne Pilsk, Smithsonian Institution  
Michael Rush, Yale University, Beinecke Rare Book and Manuscript Library  
Jon Shaw, University of Pennsylvania  
Laura Smart, California Institute of Technology  
Daniel Starr, Metropolitan Museum of Art  
Robert Wolven, Columbia University  
Thom Hickey, OCLC Research

### [Metadata Schema Transformation Services](#)

Work Team Lead: Jean Godby

Team Members:

Devon Smith, Consulting Software Engineer  
Eric Childress, Consulting Project Manager  
Larry Evans, Crosswalk Web Service Project Manager  
Jay Stuler, Technical Intern (2000 - 2006)

### [Name Extraction](#)

Work Team Lead: Jean Godby

Team Members:

Patricia Hswe, University of Illinois at Urbana-Champaign  
Judith Klavans, University of Maryland  
Dan Roth, University of Illinois

### [Publisher Name Server](#)

Work Team Lead: Lynn Silipigni Connaway

Team Members:

Robert Bremer, OCLC  
Jeremy Browning, OCLC Research  
Eric Childress, OCLC Research  
Timothy Dickey, OCLC Research  
Glenda Lammers, OCLC

### [Sharing and Aggregating Social Metadata](#)

Work Team Lead: Karen Smith-Yoshimura

Team Members:

Drew Bourn, Stanford University, School of Medicine (Lane Medical Archives)  
Douglas Campbell, National Library of New Zealand, Innovation Centre  
Kevin Clair, Pennsylvania State University  
Chris Cronin, University of Chicago  
Christine DeZelar-Tiedman, University of Minnesota  
Mary Elings, University of California, Berkeley, Bancroft library  
Steven Galbraith, Folger Shakespeare Library  
Cheryl Gowing, University of Miami  
Rose Holley, National Library of Australia  
Rebekah Irwin, Yale University, Beinecke Rare Books and Manuscript Library  
Lesley Kadish, Minnesota Historical Society  
Helice Koffler, University of Washington  
Daniel Lovins, Yale University  
John Lowery, British Library  
Mark Matienzo, New York Public Library  
Marja Musson, International Institute of Social History (Amsterdam)  
Henry Raine, New-York Historical Society  
Cyndi Shein, Getty Research Institute  
Ken Varnum, University of Michigan  
Melanie Wacker, Columbia University  
Kayla Willey, Brigham Young University  
Beth Yakel, University of Michigan, School of Information  
John MacColl, OCLC Research

### Terminology Services

Work Team Lead: Diane Vizine-Goetz

Team Members:

Carol Hickey, OCLC Research  
Andrew Houghton, OCLC Research  
Roger Thompson, OCLC Research  
JD Shipengrover, OCLC Research

### VIAF (The Virtual International Authority File)

Work Team Co-Leads: Thom Hickey and Ed O'Neill

Team Members:

Françoise Bourdon, Bibliothèque nationale de France  
Rick Bennett, OCLC Research  
Christel Hengel, The Deutsche Nationalbibliothek  
Kerre Kammerer, OCLC Research  
Ralph LeVan, OCLC Research  
Barbara B. Tillett, Library of Congress  
Jenny Toves, OCLC Research

### Work Records in WorldCat

Work Team Lead: Diane Vizine-Goetz

Team Members:

JD Shipengrover, OCLC Research  
Roger Thompson, OCLC Research  
Harry Wagner, OCLC Research

### [WorldCat Identities](#)

Work Team Lead: Thom Hickey

Team Members:

Ralph LeVan, OCLC Research  
Tom Dehn, OCLC Research  
Jenny Toves, OCLC Research

### [Influence Proposed EAC Standard](#)

Work Team Lead: Jennifer Schaffner

Team Members:

Anila Angjeli, Bibliothèque nationale de France (National Library of France)  
Lina (Vasiliki) Bountouri, Ionian University  
Karin Bredenberg, Riksarkivet (National Archives of Sweden)  
Basil Dewhurst, National Library of Australia  
Wendy Duff, University of Toronto, Faculty of Information  
Hans-Jörg Lieder, Staatsbibliothek zu Berlin (Berlin State Library)  
Dennis Meissner, Minnesota Historical Society  
Per-Gunnar Ottosson, Riksarkivet (National Archives of Sweden)  
Victoria Peters, University of Strathclyde  
Daniel Pitti, University of Virginia, Institute for Advanced Technology in the  
Humanities  
Chris Prom, University of Illinois at Urbana-Champaign  
Bill Stocking, British Library  
Stefano Vitali, Soprintendenza archivistica per l'Emilia-Romagna (Bologna)  
Kathy Wissner, Simmons College, Graduate School of Library and Information Science

### [info URI Registry](#)

Work Team Lead: Thom Hickey

Team Members:

Eamonn Neylon, Manifest Solutions, Oxford, UK  
Herbert Van de Sompel, Los Alamos National Laboratory  
Pat Stevens  
Tony Hammond  
Stu Weibel, OCLC Research  
Jeff Young, OCLC Research

### [Books as Expressions of Global Cultural Diversity](#)

Work Team Lead: Timothy Dickey

Team Members:

Lynn Silipigni Connaway, OCLC Research

Karen Smith-Yoshimura, OCLC Research  
Jeremy Browning, OCLC Research

### Deaccession Materials Held in Print and Electronic Form

Work Team Lead: Dennis Massie

Work Team:

Steve Bosch, University of Arizona  
Angela Carreno, New York University  
Jeff Carroll, Columbia University  
Margaret Flood, Trinity College Dublin  
Milan Hughston, Museum of Modern Art  
Deborah Kempe, Frick Art Reference Center  
Deirdre Lawrence, Brooklyn Museum  
Amy McColl, Swarthmore College  
Bryan Skib, University of Michigan  
Ken Soehner, Metropolitan Museum  
Merle Slyhoff, University of Pennsylvania, Law School Library  
Carolyn Walters, Indiana University  
Bob Wolven, Columbia University

### Define Policy and Infrastructure Requirements for Shared Print

Work Teams Co-Leads: Constance Malpas and Dennis Massie.

'Cloud Library' Working Group (Team Lead: Constance Malpas)

Kat Hagedorn, HathiTrust  
Eileen Henthorne, ReCAP  
Michael Stoller, New York University

'MARC 583 for Print Archiving' Working Group (Team Lead: Constance Malpas)

Everett Allgood, New York University  
Shana McDanold, University of Pennsylvania  
Jake Nadal, UCLA  
John Riemer, UCLA  
Christopher Walker, Pennsylvania State University

Shared Print Collections Coordinating Committee (Team Co-Leads: Malpas & Massie)

Susan Allen, Associate Director & Chief Librarian, Getty Research Library  
Steve Bosch, Materials Budget Procurement and Licensing Librarian,  
University of Arizona  
Martha Brogan, Director of Collection Development & Management,  
University of Pennsylvania  
Kimberly Douglas, University Librarian, California Institute of Technology  
Nancy Eaton, Dean of University Libraries and Scholarly Communications,  
Pennsylvania State University  
Sharon Farb, Associate University Librarian for Collections, University of  
California, Los Angeles

Bryan Skib, Collection Development Officer, University of Michigan  
Emily Stambaugh, Manager of Shared Print, California Digital Library  
Michael Stoller, Director of Collections and Research Services, New York University

### Seeking Synchronicity: Evaluating Virtual Reference Services

Work Team Lead: Lynn Silipigni Connaway

Team Members:

Marie L. Radford, Rutgers University (Co-Principal Investigator)

Timothy J. Dickey, OCLC (Project Manager, April 2008-present)

Jocelyn DeAngelis, Rutgers University (Project Manager, October 2005-March 2008)