

## Service Hub Application Questions

Please address all of the questions below. Limit your narrative to approximately five to ten pages. Appendices do not count towards the ten-page application limit. Answers to all questions are required.

Responses, including appendices, should be delivered as a single PDF document to [content@dp.la](mailto:content@dp.la).

### Ohio Digital Network: Ohio's DPLA Service Center Service Hub Application

#### Introduction

*This application is intended for geographic (state or regional-based) Service Hub applicants. All applicants should, ideally, be in contact with DPLA Content staff about their application before submission. If you have not been in contact, please email [content@dp.la](mailto:content@dp.la) to discuss your intent to apply.*

#### Overview-

1. Provide a summary of your proposed Service Hub and why your institution(s) are the appropriate administrator(s).

Leaders within the Ohio library and cultural heritage community began investigating the development of an Ohio Service Hub in 2014. In 2015, the State Library of Ohio (SLO) awarded the Columbus Metropolitan Library a one year LSTA grant to plan for development of the DPLA Service Hub. The Planning Grant was managed by a 15 member Steering Committee (Appendix A) and implemented a range of activities including a statewide survey (Appendix B), a symposium, research and recommendations of 6 working groups<sup>1</sup>, and monthly meetings of the Steering Committee. The proposed Ohio Digital Network: Ohio's DPLA Service Center has been developed as a result of these investigations.

A range of models were explored, including a highly decentralized model, but in the end Ohio is opting for a centralized aggregation with strong leadership from the State Library of Ohio (SLO), OhioLINK (the state's academic library collaborative), Ohio History Connection (the state Historical Society), OPLIN (the statewide public library network) and the Ohio Digitization Hubs, regionally based digitization centers located in major public libraries. This strategy builds on existing collaborative efforts and allows those organizations which are most ready to contribute to DPLA to do so.

The State Library of Ohio will be the administrator, fiscal agent, and provide metadata and technology support for the initial three year prototype period. A Project Coordinator will be hired to manage the project. This individual will work with an Executive Committee and an Advisory Committee and three working groups (advocacy, metadata and technology) that represent Ohio contributors and partners. The Executive Committee and Advisory Committee are charged to develop a long term sustainability model, reviewing both the long term governance model, as well as the financial plan. The SLO may continue as the administrator after the initial three years, or the administrative organization may change depending on the outcome of these decisions.

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<sup>1</sup> Six working groups were Advocacy, Governance, Legal, Metadata, Sustainability, Technology

2. *Clearly state who will (a) sign the **Data Exchange Agreement**, (b) act as the point of contact for communications, and (c) manage local DPLA-related activities.*

The State Library of Ohio will sign the Data Exchange Agreement. The Project Coordinator will be the primary point of contact for communication with DPLA.

There have been discussions with key collection holders across Ohio, including major academic and public libraries and historical societies, which plan to participate in DPLA through the “Ohio Digital Network: Ohio’s DPLA Service Center.”

Central Program Staff to be hired by the SLO:

- Project Coordinator will be responsible for managing “local” (Ohio) DPLA-related activities, and collaborating with the two project staff.
- Metadata specialist dedicated to the project.
- Technology specialist dedicated to the project.

The Project will partner with three existing networks: OhioLINK, OPLIN, Ohio History Connection, to establish DPLA Community Engagement Centers (CECs).

The CECs, along with the Project Coordinator, will be responsible for outreach, advocacy and facilitation of training. Additionally the Project Coordinator will work with the three statewide working groups that will include practitioners from each community represented by the CECs. These working groups will be responsible for monitoring standards and best practices, assisting with developing and implementing training, monitoring technology, and making recommendations on technology strategy, working with partners on innovative uses of DPLA content, and developing advocacy campaigns. The working groups, DPLA Project Coordinator and CEC liaisons will meet regularly to implement the program.

3. *List two to three overall goals for the first year of participation in DPLA.*

Based on the October 2015 Ohio DPLA Planning Survey, 38 Ohio library and cultural heritage organizations have digital collections in repositories that are OAI-PMH compliant. These organizations represent the first phase organizations for contribution to DPLA. Following this group there are organizations that have digital collections available through systems that do not support OAI and would have to be cross-walked into the DPLA Ohio aggregator.

- Complete agreement with DPLA and agreement with Ohio cultural heritage organizations--SLO
- Implement the REPOX based Ohio aggregation platform including review of Ohio MAP and profiling of initial 10 partner organizations--SLO
- Onboard initial Ohio institutions, harvesting collections that are OAI-PMH harvestable based on Ohio MAP, and contribute collections to DPLA, (estimated 50,000 records).

## Staffing-

1. *Describe your staffing model. In particular, please address (a) technology, (b) metadata, (c) outreach, and (d) project management roles. Please provide resumes of key project staff as Supporting Documentation - Appendix F.*

The State Library of Ohio, as the lead organization for Ohio Digital Network, will be responsible for staffing the project. For the initial three year project, the Library will hire a Project Coordinator who will report to Missy Lodge, Associate State Librarian for Library Development.

The Project Coordinator will:

- Work with the Metadata and Technology Specialists to implement the Ohio Digital Network program
- Coordinate meetings of Ohio Digital Network Executive Committee, Advisory Committee and three Working Groups (advocacy, metadata, technology); share information about DPLA and Ohio Digital Network activities across all groups
- Work with Ohio Digital Network project staff and working groups to develop and promote standards and best practices and protocols for participation in the project
- Liaise with Ohio Digital Network Community Engagement Centers (CECs) to promote participation and procedures
- Plan, organize, implement and promote Ohio Digital Network statewide meetings, workshops for new and existing partners; in cooperation with appropriate SLO staff and the Advocacy Working Group, develop advocacy messages using DPLA advocacy materials; work with the CECs; meet with potential DPLA partners
- Document and share Ohio Digital Network activities.

The Metadata Specialist will work with the Project Coordinator and the Technology Specialist to implement the project. This position will be a three year position. The Metadata Specialist will:

- Transform partner metadata for aggregation following Ohio Metadata Application Profile, in collaboration with the technology specialist
- Analyze metadata quality and mapping practices to identify required metadata clean-up work, and work with partner organizations to resolve problems
- Work with the Ohio Digital Network Metadata Working Group and provide leadership in the implementation of the Ohio Digital Network best practices in metadata creation, policies, workflow and support for creation of the Ohio Digital Network program
- Develop and conduct metadata training sessions on the Ohio Digital Network Metadata Application Profile; work with the Community Engagement Centers on implementation of training sessions
- In collaboration with the Metadata Working Group, support the maintenance and enhancement of the Ohio Metadata Application Profile and best practices
- Synchronize metadata-related tasks to ensure efficiency among the participating individual institutions, in providing metadata to DPLA using REPOX
- Document metadata policies and practices.

The Technology Specialist will work with the Project coordinator and the Metadata Specialist to implement the project. The Technology Specialist will:

- Implement and configure the REPOX platform; provide ongoing support for harvesting, normalization and ingest of Ohio partner metadata
- Work with the Metadata Specialist to write and apply XSLT data transformations according to defined project specifications
- Identify, select, configure and manage technology solutions for data normalization tasks as required
- Provide programming and technical support for all components of the Ohio workflows
- Envision, develop and implement programming solutions needed to streamline data ingest, remediation, and transformation processes as needed
- Work with the Technology Working group on initiatives and opportunities for utilizing Ohio collections, hosting Ohio Digital Network Hackathon, etc.
- Monitor developments and new technologies for harvesting and transmitting metadata to DPLA
- Document technology decisions and implementation.

In addition to hired staff the project will require the support of staff at the Community Engagement Centers and volunteers from cultural heritage organizations throughout the state who will be serving on Working Groups and the Executive Committee and Advisory Committee.

#### **Governance-**

1. *It is important to think through how your partners will be represented in your new hub and how important decisions that affect your hub network will be made. How will governance for your hub be structured to ensure that the interests of all participating institutions are represented?*

The Ohio Digital Network Governance Working Group recommended a tiered governance structure as illustrated in Appendix C—Governance—Roles and Responsibilities. This approach assures the broadest possible involvement by partner organizations. As the project has matured, Ohio Digital Network has moved from the planning phase steering committee to management by the Executive Committee. The Executive Committee makes decisions regarding policies, program strategies, reviews and monitors budgets, long term sustainability strategies, and will work closely with the Project Coordinator and the State Library of Ohio. The Executive Committee is composed of representatives from each of the Community Engagement Centers, the chair of the Advisory Committee, the State Library of Ohio, and the Project Coordinator.

An Ohio Digital Network Advisory Committee is made up of two representatives from each CEC. These individuals will be directors or director designates from partner organizations and the chairs of the three Working Groups. The Advisory Committee will also include the Project Coordinator. The Advisory Committee chair will be one of the CEC representatives.

The Community Engagement Centers represent the cultural heritage type of organizations within Ohio—academic libraries, public libraries, historical societies. These are built around existing networks within the state—OhioLINK, Ohio History Connection and OPLIN. In the future, a separate museum center may be established, but initially museums fall under the Ohio History Connection CEC.

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Each CEC will also appoint a liaison that will work with the partners in their community. These CECs will be responsible for advocacy, facilitating training, networking, etc.

Lastly, the Ohio Digital Network will continue three Working Groups from the planning period— metadata, technology and advocacy. These groups will work statewide, with specific charges for each working group.

2. *Describe your current and anticipated funding model. Note that an important aspect of all funding models includes institutional commitment and in-kind support.*

The initial three-year funding of approximately \$300,000 per year will be supplied by the State Library of Ohio. In kind funding from Executive Committee, Advisory Committee and Working Group members as well as partner libraries has not yet been determined, however the sustainability Working Group has developed a means of capturing these contributions. The Ohio Digital Network believes it is important to understand the true cost of the Network. Based on limited investigation with other service hubs, we've been able to find no other hub that has captured the true cost of participation. Rather than 'guess' at costs, Ohio is determined to capture these costs, not only for future Ohio partners, but for the DPLA community at large.

As Ohio has a Knight Ridder newspaper, we propose use of Knight Foundation funds to support development and implementation of this cost analysis model. Based on discussions with several other DPLA service hubs, there has been no assessment of local partner cost of participation in DPLA and only limited cost analysis of cost at the Service Hub level. Such analysis could be very beneficial for the development of business models for both current and future hubs.

The proposed matrix developed by the Sustainability Working Group can be found in Appendix D: Ohio Digital Network Cost Analysis Model.

The Ohio Digital Network proposes to use Knight Foundation funds:

- To assist in the development of crosswalks from historical society content platforms such as Past Perfect, supporting aggregation into Ohio Memory or into the Ohio Digital Network's REPOX site
- For mini-grants for development of apps that support use of Ohio content in DPLA
- Targeted digitization of content
- Community based digitization

#### **Partnership-**

1. *List current partners (name of organization, **institution type**) and the role each will play in the Service Hub. Include information about which partners will provide services to the network, as well as those that will only contribute metadata. Use the **sample spreadsheet** as a guide. This document will be Supporting Documentation - Appendix 1. If your state or region provides a centralized repository service for institutions, please make sure to list the institutions supported by that service and describe the continued role of that service.*
2. *It is important to DPLA that the hubs network represent the breadth of cultural heritage institutions whenever possible. How will you go about recruiting institution types that you usually do not work with? (Libraries often work with other libraries, not historical societies or museums, and vice versa.)*

Ohio cultural heritage organizations began digitizing collections in the late 1990's with the development of such initiatives as Ohio Memory, under the leadership of the Ohio History Connection and the State Library of Ohio, Ohio Memory currently has 24 active contributing members and another 10 organizations who have completed digital projects. These partners represent libraries, archives, museums and historical societies; the majority of the participants are history museums and historical societies.

Ohio academic libraries that are members of OhioLINK also host digitized collections that are from museums and cultural heritage organizations. For example, the OhioLINK central Digital Resource Commons hosts the digitized images of the Hayes Presidential Center; other college and university archives in Ohio have strong relationships with historical societies and cultural heritage organizations in their region. In addition the Ohio Digitization Interest Group, a cross-institution-type practitioner group with a strong presence in the state, will serve as another venue for recruitment and advocacy.

The Ohio digitization hubs were established through State Library of Ohio LSTA funding to support regional digitization of community based collections. The four regionally based hubs use CONTENTdm to host collection and offer digitization services to public libraries, community based organizations as well as individuals.

3. *Step through the process of on-boarding new partners. Consider the following:*
  - a. *Communicating requirements of data sharing (CCO metadata, unrestricted access to records, providing thumbnails, not sharing EADs, adhering to local and DPLA metadata requirements)*

The Advocacy Working Group developed a range of materials regarding the value and benefits of Ohio Digital Network participation, which is critical to bring in new partners. The project website will include a range of information, including the CEC contacts, the DPLA Metadata Application Profile and an FAQ regarding the Ohio Digital Network. The primary means of communication will be through the Community Engagement Centers. See the following section.

- b. *Providing services (as appropriate)*

An organization interested in becoming an Ohio Digital Network partner may contact either the SLO or one of the CEC's. The SLO will refer the organization to the appropriate CEC who will provide DPLA orientation, including introduction to the Ohio Digital Network program, the requirements for data sharing, the Ohio training program and a copy of the letter of agreement for participation in the Ohio Digital Network. If the organization has not developed digital content as yet, they will be referred to organizations that can assist with digitization, including one of Ohio's public library digitization hubs located at Columbus Metropolitan Library, Toledo-Lucas County Public Library, Cleveland Public Library and Public Library of Cincinnati-Hamilton County.

#### *Reviewing metadata:*

Once an organization has signed the letter of agreement, they will attend an Ohio Digital Network workshop/webinar where introduction to the Ohio Digital Network Metadata MAP and harvesting will be provided. The Metadata Specialist and CEC liaison will be participating in these sessions to provide the initial assistance. As our first phase contributors are OAI-harvest ready, we believe that these

individuals will require little in the way of orientation and we can move quickly to the Ohio Metadata MAP.

The Metadata Specialist will be reviewing the initial metadata contribution from each partner. Revisions will be made following each review until the harvests meet the desired profile.

c. *Aggregating content*

XSLT profiles will be created for each partner by the Metadata Specialist and the Technology Specialist based on the DPLA and Ohio MAP. These will be reviewed and tested with each partner. Once successful the content will be harvested into the Ohio REPOX site. While plans have not been fully fleshed out, it is intended that the first phase group's records will be aggregated (approximately 50,000 records), then a second set of records from the first phase partners will be aggregated for contribution. When the first phase partners have been completed then the second phase partners will be worked on. The second phase partners are organizations that have OAI supported systems, but OAI has not been implemented. While the first phase partners' metadata is being harvested, staff will be working with the second phase partners on implementation of their OAI functionality.

Once those partners have been aggregated then the Ohio Digital Network will turn to the organizations with digital collections that are non-OAI support and require cross-walks to be built.

d. *Other activities not listed*

During the initial three year prototype other activities that the hub will undertake will be an ongoing cycle of introduction to the Ohio Digital Network program, introduction to metadata and harvesting, and then working with partner organizations to bring in new content. Once a core group of organizations have contributed content, Ohio can move to more advanced activities such as holding Hackathons; working with K-12 education on using DPLA content; and community engagement.

### **Technology-**

1. *What technology do you plan to use for (a) aggregating metadata and (b) delivering that metadata to DPLA through a single data source?*

The Technology Working Group undertook a comprehensive assessment of the current aggregation environment used by other service hubs as well as new options. Appendix E provides the hub analysis. The Working Group recommended to the Steering Committee that REPOX be implemented during the three year prototype period. The Steering Committee approved this recommendation. REPOX has been implemented by a number of DPLA service hubs; Europeana continues to develop this open source aggregation software; it's easy to install and maintain particularly for hubs that do not wish to undertake complex metadata remediation at the central site; and there is a network of organizations supporting REPOX.

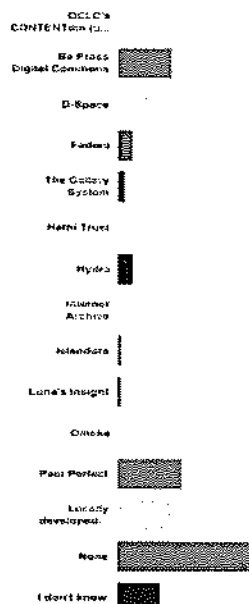
The Ohio Steering Committee gave serious consideration to utilizing a Hydra platform that is currently being implemented at the Pennsylvania Service hub and to an OCLC aggregation option. At this time, it was felt that the Hydra option would take significant programming resources which Ohio doesn't

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currently have available. Additionally Hydra-in-a-box development is moving forward and Ohio will monitor that development as a potential future option for aggregation. At this time, Ohio is also monitoring the work that OCLC is undertaking as a future option for aggregation. Both these options may offer better long term sustainability than REPOX.

2. *What repository/DAMS systems are currently in use in your network by your existing and potential partners? Are you currently able to harvest content from those systems? If not, how do you plan to ramp up?*

As part of the planning project, the previously-mentioned survey of Ohio cultural heritage organizations was undertaken. Of the 150 respondents, 54 utilize CONTENTdm as their repository, followed by Past Perfect, BePress, and Omeka. A large number of Ohio organizations with digital collections don't have a repository. The following chart provides details on the DAMS that are currently utilized by potential



partners.

The on-ramping strategy will be to work with partners who have OAI-compliant systems during the first phase; organizations who have systems that can be cross walked (e.g. Past Perfect) during the second phase; and finally organizations with digital collections that do not have a digital repository in a third phase. From discussions with Ohio History Connection we have identified historical societies and museums who have utilized Flickr and Facebook to share their digital collections. These organizations will fall into the third phase.

Based on the survey, we asked the organizations to indicate if they currently support OAI-PMH, if they have systems that support OAI-PMH but haven't enabled it, and what other harvesting systems are supported. Of the 143 respondents to that question, 23 had implemented OAI, and another 7 have systems supporting OAI, 49 don't know if they have OAI-PMH, 38 would have to utilize another means of cross-walking metadata, while 47 don't support any type of harvesting.

The Program Coordinator and the CEC liaisons will be responsible for working with the organizations to determine their readiness for DPLA contribution.



3. *Who will be responsible for managing your technology stack?*

The State Library of Ohio's Department of Information Technology will be responsible for implementing and managing the technology stack. They will be using a hosted cloud service rather than managing on site at the State Library.

**Metadata-**

1. *How will you go about getting buy-in for your hub on the following issues. Who will perform this work? What will the workflow look like?*

(Please respond separately to each bullet point):

- *Metadata remediation, e.g., corrections to errors in partners' data or adding missing values to DPLA-required metadata fields,*

The Metadata and Technology Working Groups have investigated how various service hubs have approached metadata remediation. As Ohio does not have an established statewide digital collaborative as some of the earlier Service Hubs have, Ohio has decided that during the initial three-year prototype program our priority will be bringing on partners. To gain program buy-in, we will keep the metadata requirements as low as possible; that includes having a limited number of required fields, only those that the DPLA MAP requires; and limiting the amount of remediation that is required upon initial ingest and allowing partners to enhance their metadata over time. Ohio has decided to follow the North Carolina Digital Heritage Model, using the REPOX platform for aggregation. Based on surveying we have a good understanding of what sites are ready for this initial phase based on a follow-up survey conducted in winter, 2016, the findings of which are reported below.

A metadata survey conducted of the 38 organizations who were OAI-PMH compliant and who are likely to participate in the first phase of Ohio's DPLA project asked questions regarding the metadata schema used, the readiness of their metadata, and their readiness for harvesting. Of the 38 organizations, 12 indicated that they could be ready for harvest in September, 2016, another 7 would be ready in January, 2017, 1 would be ready in June, 2017, and 8 didn't respond to this question. The majority of these partners utilize CONTENTdm and the majority of the respondents indicated that they have staff available to assist with remediation.

The central site will develop a profile for each partner and work with that partner in harvesting their metadata.

In terms of limited required metadata fields, the Metadata Working Group recommends the following:

The required metadata fields for aggregation in DPLA Ohio should be kept minimal, in line with the requirements of DPLA.

- |                             |                            |
|-----------------------------|----------------------------|
| 1. Required:                | Title, Rights              |
| 2. Required When Available: | Collection, Language, Type |
| 3. Strongly recommended:    | Date, Place, Subject       |

As REPOX will be the aggregating tool and it is ill suited for remediation, the Metadata and Technology Working Group recommended that remediation be done by the local institutions. The local institution remediation will be an iterative process, with updates and improvements occurring over time and with repeated metadata harvesting.

The Technology Group said, "...by choosing REPOX, the working group recommends that DPLA Ohio metadata working group focus primarily on providing best practices, but that the initial 3 year project provide zero metadata remediate services. ...and the minimal level of metadata remediation necessary to provide aggregation data to DPLA."

At such time that more sophisticated aggregation tools are available for production sites, such as Hydra-in-a-box, Ohio Digital Network will consider central site remediation.

Ohio Digital Network will develop an XSLT profile for each institution, so whatever is harvested will be mapped to the DPLA MAP.

We believe that the contributing organizations will be able to undertake the needed optional field remediation once they see these requirements and guidelines.

- *Rights re-labeling and enhancement (for more information see Recommendations for standardized international rights statements: <http://dp.la/info/2015/05/11/the-principles-for-establishing-international-interoperable-rights-statements/>)*

Ohio is adopting the recommendations included in the Rightsstatements.org ([http://rightsstatements.org/files/160208recommendations\\_for\\_standardized\\_international\\_rights\\_statements\\_v1.1.pdf](http://rightsstatements.org/files/160208recommendations_for_standardized_international_rights_statements_v1.1.pdf)). As no metadata has been harvested yet Ohio has the opportunity to work with its partners to relabel or enhance rights metadata. During the December Symposium the Legal Working Group held an introductory session on rights statements and the winter, 2016 survey questioned the phase one institutions regarding their current rights metadata situation. Many respondents indicated that rights and geographic elements were areas requiring remediation. Ohio plans on conducting workshops on rights.

In addition, the State Library of Ohio and other partner organizations would work with organizations who are new to digitizing collections on copyright issues, incorporating the Rightsstatements.org ([http://rightsstatements.org/files/160208recommendations\\_for\\_standardized\\_international\\_rights\\_statements\\_v1.1.pdf](http://rightsstatements.org/files/160208recommendations_for_standardized_international_rights_statements_v1.1.pdf)) and addressing rights management issues facing digitization of collections.

2. *In which metadata standard do you anticipate delivering your data to DPLA? (Preferred standards are Qualified Dublin Core, MODS, or MARC XML, or the DPLA metadata application profile.)*

The Metadata Working Group has developed its own Metadata Application Profile that is modeled after the Pennsylvania Service hub and incorporates the DPLA metadata application profile. The application profile is Appendix F.

Ohio will be using Dublin core either dc or dcterms.

3. *What, if any, metadata remediation has been done on your current collections? (Examples: formatted all dates consistently, expressed fields across collections in the same way, spelling and grammar error clean up, added geographic information, such as latitude and longitude values.)*

As implementation has not yet occurred, no remediation has been undertaken. Potential participants have remediated metadata issues at the local level. As described above Ohio cultural heritage organizations have a rich history of collaboration in digital collections projects. Libraries in particular have created and used best practices and guidelines that aided them in creating consistent metadata across communities.

It is likely however that with the formation of the Ohio Digital Network more work will need to be done to move towards fully consistent metadata across communities.

### Content—

1. *Provide links to two or three of your partners' standout collections or collections that spotlight underrepresented populations.*
  - Althea Hurst Scrapbook: <http://cdm16998.contentdm.oclc.org/cdm/landingpage/collection/p16998coll1>
  - Charles Young Photo Collection—Ohio Memory—Collection of African American civil war soldier photos, letters and memorabilia  
<http://www.ohiomemory.org/cdm/search/searchterm/%09Charles%20Young%20Collection/order/nosort>
  - Columbus African American Collection: <http://digital-collections.columbuslibrary.org/cdm/landingpage/collection/african>

2. *Provide a record count for your initial ingest to DPLA. 50,000 records is the minimum required for an initial ingest.* Please confirm that:

A "record" represents a one-description to one-object relationship.

Each record resolves to a full digital object available for use online without authentication or similar restriction. Page-level metadata descriptions are not included in your record counts—multi-page objects should be described at the series or book level.

Institutional repository content and finding aids are not included in your record counts. These types of content currently fall outside the scope of DPLA's collecting policies.

*Please provide information about topics, formats, scope, etc., that comprise your collections.*

The Ohio Digital Network collection is composed of the full range of digital formats, with a significant collection of digital photos, text, manuscripts, maps, and newspaper clipping files. Oral histories are available as digital audio and digital video. Ohio understands that at this time metadata linking to newspapers, ETD's, institutional repository content, and EAD files cannot be contributed.

The digital collections managed by Ohio's cultural heritage organizations are broad and deep reflecting Ohio's important role in U.S. history, including collections on those that served as U.S. Presidents, astronauts and Ohio's important role in war, including the Civil War. Below are a few of the collections that might be contributed:

- John Glenn Collection, Guernsey Historical Society—a collection of photographs and memorabilia from Senator and astronaut John Glenn.

- 19<sup>th</sup> century photography—In 1848, William Porter along with his partner Charles Fontayne, captured the famous daguerreotype view of Cincinnati, a panorama consisting of eight plates now considered the oldest comprehensive photograph of an American City
- World War I & II Propaganda Poster Collection
- 15 Abraham Lincoln letters

### Service and Outreach—

*How will you make use of your hub network to provide services beyond aggregation: digitization, metadata, preservation, professional development and other forms of capacity building, etc.?*

Ohio has a history of decentralized collaborative digitization. Ohio Memory was a shared collaborative digitization initiative begun in the late 1990s led by the Ohio History Connection that today involves 24 active historical societies and holds digital collections from many more organizations. Cleveland Memory, led by Cleveland State University, is a collaborative initiative of Cleveland area cultural heritage organizations. Four public libraries have established digitization hubs built around CONTENTdm, digitizing collections from area libraries, historical societies and individuals. Ohio's academic libraries have collaborative initiatives with campus units and community organizations building subject and regional digital collections. Ohio's digital initiatives have been more regionally based rather than statewide, so the future development of the Ohio Digital Network service hub will very much depend on how this initial aggregation develops.

There is significant demand within the state to expand digitization activities, and the State Library has put in place a program to support expanded digitization through the digitization hubs. Conducting of training programs for cultural heritage organizations in digitization is already underway. The digitization centers will be integrating the DPLA program into their programs.

For the initial period, bringing on partners to the Ohio Digital Network will be the focus, along with steering those interested in digitization to the existing programs within the state.


### General timeline-

Provide a general timeline that steps through the initial planning process that will enable you to adhere to the **2015 Application Cycle 2 Timeline**. *If you feel that your hub cannot comply with the cycle 2 timeline, please consider applying during the next application cycle.*

We recognize that you may have already completed some of the steps in this process. If so, simply indicate that as part of your timeline. Consider the following:

Spring, 2016	Establish Ohio Digital Network (ODN) Governance Appoint Working Group Chairs
August, 2016	Submit Ohio DPLA Application Solicit and Select Advisory Committee Representatives Solicit and Select Working Group Members
Month 1 after notification of acceptance	

- Post ODN job descriptions
- Establish ODN communication structure
- Hold initial meetings
- SLO complete DPLA agreement
- Month 2 after notification
  - Hold webinar/meeting for phase one partners to communicating requirements of ODN participation, metadata requirements, harvesting requirements
  - Hire project coordinator, metadata specialist, technology specialist
- Month 3 after notification
  - initiate installation of REPOX
- Month 3-6 after notification
  - Complete partner agreement forms
  - Initiate metadata review
- Month 4-6 after notification
  - Test aggregation systems
  - CEC Promotion of Ohio Digital Network
- Month 7 after notification
  - Initial testing of harvesting
  - Workshops/webinars on ODN metadata
- Month 9-18 after notification
  - Production harvesting of phase one
  - Webinars on rights management, ODN metadata, ODN harvesting
  - Site visits
- Month 15-24 after notification
  - Initiate and implement non-OAI harvestable systems
  - Ongoing harvesting of established partners

	A	B	C	D	E
1	 DIGITAL PUBLIC LIBRARY OF AMERICA				
2	<b>OHIO DIGITAL NETWORK PARTNER INSTITUTIONS-- MARCH, 2016</b>				
3					
4	<b>Name of Institution</b>	<b>Institution</b>	<b>Services Provided</b>	<b>Contributor?</b>	<b>No of records</b>
5	University of Cincinnati	A	metadata	X	668,298
6	Ohio State University	A	metadata	X	60,000
7	Cleveland State University	A	metadata, collaboration	X	56,186
8	Oberlin College Library	A	metadata	X	54,000
9	OhioLink	Consortia	technical staff, administration, metadata	X	5,000
10	Ohio University	A	metadata	X	7,000
11	Youngstown State University	A	metadata	X	15,000
12	Kenyon College	A	metadata	X	Not given
13	University of Dayton	A	metadata	X	2,000
14	Wright State University	A	metadata	X	8,000
15	Bowling Green State university	A	metadata	X	6,032

	A	B	C	D	E
16	University of Toledo	A	metadata, technical	x	7,100
17	Miami University	A	metadata		90,000
18	University of Mount Union	A	metadata	x	No Survey #2
19	Ohio Wesleyan University	A	metadata		1,877
20	Otterbein University	A	metadata		878
21	Kent State University	A	metadata		4,826
22	Denison University	A	metadata	x	10,000
23	College of Wooster	A	metadata	x	Not given
24	Xavier University	A	metadata		105
25	Case Western Reserve Univ	A	metadata	x	50,000
26	University of Akron	A	metadata	x	32,373
27	Columbus Public Library	P	metadata, administrative, digitization	x	61,525
28	Cleveland Public Library	P	metadata, digitization	x	58,470
29	Worthington Public Library	P	metadata	x	1,649
30	Upper Arlington Public Library	P	metadata	x	Number not listed
31	Akron-Summit County Public Libr	P	metadata	x	5,000
32	Mid-Pointe Library System	P	metadata		9,220
33	Toledo Lucas County Public Lib	P	digitization, metadata	x	600

	A	B	C	D	E
	Public Library of Cincinnati & Hamilton City	P	metadata, digitization	x	13,000
34	Puskarich Public Library	P	metadata	x	No Survey #2
35	Pub lib of steubenville & Jeff Co	P	metadata	x	82,000
36	Westerville Public Library	P	metadata	x	No Survey #2
37	Ohio History Connection	State Historical Society	administration, metadata, collaboration, advocacy	x	40,000
38	State Library of Ohio	State Library	administration, metadata, technology, advocacy	x	16,000
39					



**Appendix A: Governance Structure  
Planning Steering Committee (2015-2016)**

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## Appendix B: DPLA Ohio Survey Executive Summary

### Introduction

As part of the Ohio Digital Public Library of America (DPLA) planning grant, the project steering committee conducted a survey of Ohio's libraries, museums, historical societies, and archives to identify the current digital activities being undertaken by Ohio's cultural heritage organizations. The information gathered through the survey will aid in planning the Ohio DPLA initiative.

The survey was distributed to Ohio's cultural heritage organizations by state agencies and through professional association lists, and was available from October 1-26, 2015. A total of 219 responses were received.

This survey was funded in part through a federal Institute for Museum and Library Services (IMLS) Library Services and Technology Act (LSTA) grant, awarded by the State Library of Ohio to the Columbus Metropolitan Library.

### Key findings:

- Who has digital collections? Of the 219 responses, 128 (58.99%) of the respondents reported that they had digital collections, while 89 did not. Of those that did not, 30 (33.7%) plan to create digital collections in the next three years. Based on this information, the initial three years of an Ohio DPLA project would focus on 128 organizations. An additional effort could focus on those organizations who would be initiating digitization projects so that they are prepared to contribute to the Ohio DPLA program in future years.
- What content is available? Respondents have created or collected a range of formats of materials. Now that the Steering Committee has identified which organizations have digital collections, it will be important to define what subject areas or themes will be targeted for harvesting. Discussions with DPLA will help guide the collection development policy.
- What digital asset management systems are used? The Ohio DPLA service center or sub-hubs will need to harvest metadata from locally managed digital asset management systems. The survey found that of the respondents who had digital collections or planned to, 38 did not have a system while 12 did not know what system they had. The most commonly used system was CONTENTdm. Several of the organizations used multiple systems. Ohio DPLA needs to consider how to address the issue of how to support organizations that have digital content but don't have a digital asset management system.
- Who is ready to participate in Ohio DPLA? DPLA has recommended that Ohio identify organizations based on readiness to have their collections harvested; and that the institutions be organized into three groups. Based on the survey, the organizations that are likely to be most ready to have their collections harvest would be those who have implemented the OAI-PMH protocol, followed by those whose digital asset management system supports the OAI-PMH protocol but who haven't implemented it. The third group might be those organizations who have a digital asset management system and can provide data in some other manner. Ohio DPLA might consider a fourth group, those organizations with digital content but without a content

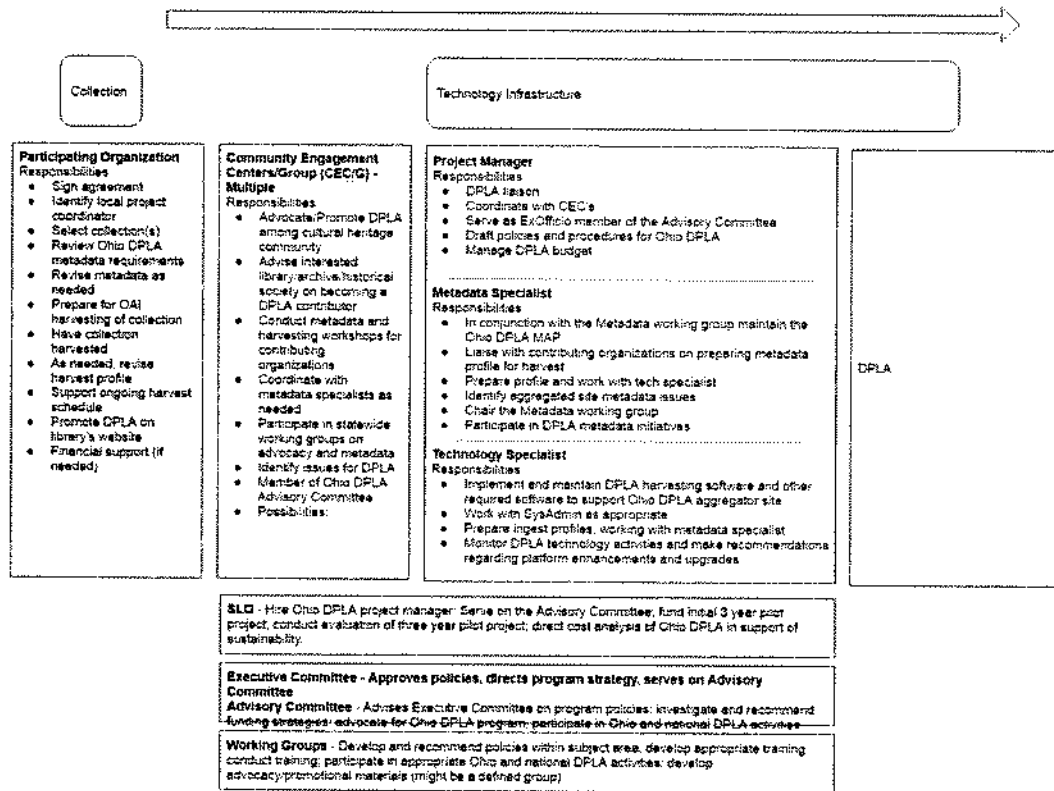
management system. The survey identified 23 organizations that have implemented OAI-PMH, and 7 have systems that support OAI-PMH.

- How many metadata records are there? While 128 respondents reported having digital content, the majority of the collections were small, less than 10,000 metadata records. Of the 128, 35 organizations had between 10,001-999,000 metadata records that were publicly accessible; the majority of these organizations had systems that supported OAI-PMH.
- What is the status of access to digital resources and copyright? Key to successful participation in the DPLA is having the rights to provide access to the digital resources. The survey queried respondents regarding their level of confidence in determining copyright; most of the respondents felt very confident. However, fewer respondents actually recorded information regarding rights.

The survey collected samples of copyright statements from more than 40 respondents; as part of the effort to prepare to harmonize the metadata for DPLA contribution, the metadata working group should review the DPLA and Europeana paper, *Rightsstatements.org White Paper: Recommendations for Standardized International Rights Statements*, [http://rightsstatements.org/files/151002recommendations\\_for\\_standardized\\_international\\_rights\\_statements.pdf](http://rightsstatements.org/files/151002recommendations_for_standardized_international_rights_statements.pdf). This paper provides guidance on the structure of rights statements in metadata records and recommends a dozen possible copyright statements that will ease understanding of rights for end users.

- Recommendation on the need for education: The survey identified a need for further education on issues related to digitization and born digital materials, copyright and other intellectual property issues such as deeds of gift, and metadata schemas, cataloging standards, and metadata harvesting practices. To build and sustain a successful Ohio Digital Public Library of America Service Hub, awareness and adoption of best practices and standards for digital creation and metadata development need to be spread across all types of cultural organizations.

# Appendix C—Governance—Roles and Responsibilities



## Ohio Digital Network Governance (2016-2019)

### Executive Committee

State Library of Ohio Representative	Beverly Cain, State Librarian, State Library of Ohio <a href="mailto:bcain@library.ohio.gov">bcain@library.ohio.gov</a>
Community Engagement Center Academic Libraries	Gwen Evans, OhioLINK <a href="mailto:gwen@ohiolink.edu">gwen@ohiolink.edu</a>
Historical Societies	Stacia Kuceyeski, Ohio History Connection <a href="mailto:skuceyeski@ohiohistory.org">skuceyeski@ohiohistory.org</a>
Public Libraries/Digitization Centers	Stephen Hedges, OPLIN <a href="mailto:stephen@oplin.ohio.gov">stephen@oplin.ohio.gov</a>
Advisory Committee, Chair	TBD
Project Coordinator (Interim)	Missy Lodge, State Library of Ohio <a href="mailto:mlodge@library.ohio.gov">mlodge@library.ohio.gov</a>

### Advisory Committee

Project Coordinator (Interim)	Missy Lodge, State Library of Ohio <a href="mailto:mlodge@library.ohio.gov">mlodge@library.ohio.gov</a>
Community Engagement Center (2 representatives per center)	
Academic libraries	TBD
Public Libraries	TBD
Historical Societies	TBD

### Working group chairs

Metadata	Meghan Fraser, OhioLINK
Technology	Nathan Tallman, University of Cincinnati
Advocacy	Shannon Kupfer, State Library of Ohio

## Appendix D—Ohio Digital Network Cost Analysis

OhioDPLA 3-year test: Sustainability Tracker	Actual \$ Spent	In-kind Contributions (Time spent x Salary)	Notes
<b>Contributing Institution Costs (LAM)</b>			
Sign agreement			
Identify local project coordinator			
Select collections			
Review Ohio DPLA metadata requirements and revise metadata as needed			
Prepare for OAI harvesting of collection			
Have collection harvested			
As needed, revise harvest profile			
Support ongoing harvest schedule			
Promote DPLA on Institution's website			
Maintenance			Is this where we would track storage costs? What about smaller organizations that don't have servers, etc.
<b>Community Engagement Center (CEC) Costs</b>			
Advocate/Promote DPLA among cultural heritage community			Do CEC's also have "onboarding" costs in working with Contributing Institutions?

<u>Categories</u>	<u>Actual \$ Spent</u>	<u>In-kind Contributions (Time spent x Salary)</u>	<u>Notes</u>
Work with interested library/archive/historical society on becoming a DPLA contributor			
Conduct metadata and harvesting workshops for contributing organizations			
Coordinate with metadata specialists as needed			
Participate in statewide working groups on advocacy and metadata			
Identify issues for DPLA			
Member of Ohio DPLA Advisory Committee			
SLO			
prototype "staffing";			These positions should track how they spend their time to get an understanding of capacity
<b>Project Manager</b>			
DPLA Liaison			
Hire and manage Ohio DPLA staff			
Coordinate with CEC's			
Serve as ExOfficio member of the Advisory Committee			
Draft policies and procedures for Ohio			
Manage DPLA budget			
<b>Metadata Specialist</b>			
In conjunction with the Metadata working group maintain the Ohio DPLA MAP			
Liaise with contributing organizations on preparing metadata profile for harvest			
Prepare profile and work with tech			
Identify aggregated site metadata issues			
Chair the Metadata working group			
Participate in DPLA metadata initiatives			
<b>Technology Specialist</b>			

<u>Categories</u>	<u>Actual \$ Spent</u>	<u>In-kind Contributions (Time spent x Salary)</u>	<u>Notes</u>
Implement and maintain DPLA harvesting software and other required software to support Ohio DPLA aggregator site			
Work with SysAdmin as appropriate			
Prepare ingest profiles, working with Metadata Specialist			
Monitor DPLA technology activities and make recommendations regarding platform enhancements and upgrades			
<b>SLO - Administration</b>			
Conduct regular evaluations of the project			
Conduct regular direct cost analysis of the project			
<b>Technology Infrastructure</b>			Tracking technology costs, even during start up will provide insight as it becomes time to upgrade / replace equipment
Equipment			
Infrastructure			
Supplies			
<b>Advisory Committee</b>			
[list each member]			
Review and recommend program policies			
Investigate and recommend funding strategies			
Advocate for Ohio DPLA program			
Participate in Ohio and national DPLA activities			
<b>Working Groups</b>			
[list each group and member]			
Develop and recommend policies within subject area			



<u>Categories</u>	<u>Actual \$ Spent</u>	<u>In-kind Contributions (Time spent x Salary)</u>	<u>Notes</u>
Develop appropriate training			
conduct training			
develop advocacy/promotional materials			
Participate in appropriate Ohio and national			
DPLA activities			
<b>DPLA</b>			
<b>Other Sustainability elements</b>			
Evaluation			More for prototype but helpful to track evaluation early on; evaluate user satisfaction; institution satisfaction?
Outcome statements			Not sure what they are at this point, but let's plan on building them
Usage			We need to be able to show people are viewing items due to DPLA metadata; does system support this?
			What level of detail do we need?

## Appendix E—Technology Analysis

	Subscription Cost	Hardware Cost	Technical Expertise	Customizability	Time Required	Total Anticipated Staff Time (in FTE)
<b>Hydra/Fedora</b>	optional*	High	High	Fully	Long	1.00 Developer 0.50 DevOps Administrator 0.25 Project Manager
<b>Repos</b>	no	Low	Medium	Somewhat	Medium	1.00 Developer (4 mos.) 0.15 Developer 0.25 Sys Admin.
<b>OCLC Gateway</b>	yes**	None	Low	Limited	medium* ***	0.50 Project Manager (4 mos.) 0.25 Project Manager
<b>Primo / Encore/ Summon/ EDS</b>	yes***	None	Low	Limited	Medium	0.25 Project Manager
<b>Local Development</b>	no	High	High	Fully	Long	1.00 Developer 0.50 DevOps Administrator 0.50 Project Manager
* Hydra/Fedora development, management, and hosting can be contracted with company Data Curation Experts.						
** Subscription costs can be paid at the center (DPLA-OHIO Hub) for all members of the project, or by individual members.						
*** Subscription costs to vendor would be paid at the center (DPLA-OHIO Hub)						
**** Gateway functionality does not currently exist. Would require both OCLC development, and stakeholder development of functionality list and user stories.						

## Appendix F—Ohio Metadata Application Profile

### Proposed Metadata Application Profile

#### Introduction

This MAP details a proposed set of metadata elements, and includes suggestions for best practices, MARC mapping where appropriate, and recommended controlled vocabulary or syntax for fields.

The MAP has Required and Required When Available fields:

Required: Title, Rights  
 Required When Available: Collection, Language, Type

Remaining fields are Strongly Recommended, Recommended, or Optional.

For aggregation and Inclusion in the DPLA, metadata for the Ohio DPLA Project must be contributed with a [Creative Commons CC0 license](#).

#### Described Resource Elements

The following fields apply to the attributes of the described resource, not to the digital representation of the object in the case where that representation is a digital surrogate.

Required		
DPLA Label	DPLA Property	Usage
Title	dc:terms:title	Primary name given to the described resource
Rights	dc:rights	Information about rights held in and over the described resource. Typically, rights information includes a statement about various property rights associated with the described resource, including intellectual property rights

Required When Available		
DPLA Label	DPLA Property	Usage
Collection	dc:terms:isPartOf	Collection or aggregation of which described resource is a part
Language	dc:terms:language	Language(s) of described resource. Lexvo
Type	dc:terms:type	Nature or genre of described resource. DCMIType

Strongly Recommended		
DPLA Label	DPLA Property	Usage
Date	dc:date	Date value as supplied by data provider
Place	dc:terms:spatial	Spatial characteristics of described resource, such as a

		country, city, region, address or other geographical term. Captures aboutness
Subject	dcterms:subject	Topic of described resource

Recommended		
DPLA Label	DPLA Property	Usage
Creator	dcterms:creator	Entity primarily responsible for making described resource
Format	dc:format	Physical medium or dimensions of described resource
Publisher	dcterms:publisher	Entity responsible for making the described resource available, typically the publisher of a text

Optional		
DPLA Label	DPLA Property	Usage
Alternate Title	dcterms:alternative	Any alternative title of the described resource including abbreviations and translations
Contributor	dcterms:contributor	Entity responsible for making contributions to described resource
Description	dcterms:description	Includes but is not limited to: an abstract, a table of contents, or a free-text account of described resource
Extent	dcterms:extent	Size or duration of described resource
Format	dc:format	Physical medium or dimensions of described resource
Genre	edm:hasType	Captures categories of described resource in a given field. Does not capture aboutness. AAT
Identifier	dcterms:identifier	ID of described resource within a given context
Relation	dc:relation	Related resource
Rights Holder	dcterms:rightsholder	A person or organization owning or managing rights over the resource
Temporal Coverage	dcterms:temporal	Temporal characteristics of the described resource. Captures aboutness

## Derived Elements

Attributes of the digital representation of the web resource and aggregation of attributes that apply to the described resource as a whole.



DPLA Label	DPLA Property	Usage
File Format	dc:format	Web resource format. Internet Media Types
Collection Title	dcterms:title	Name of the collection or aggregation. OAI <SetName>
Collection Description	dcterms:description	Free-text account of aggregation, for example an abstract or content scope note. OAI <SetDescription>
Data Provider	edm:dataProvider	The organization or entity that supplies data to DPLA through a Provider.
Is Shown At	edm:isShownAt	Unambiguous URL reference to digital object in its full information context
Preview	edm:Preview	The URL of a thumbnail, extract or other type of resource representing the digital object for the purposes of providing a preview
Standardized Rights Statement	edm:rights	The value given here should be the rights statement that applies to the digital representation as given (for example) in edm:isShownAt when these resources are not provided with their own edm:rights. This property requires a controlled set of values. URI.

## Element Details

Elements are in order alphabetically; see Appendix A for explanations of controlled vocabulary/syntax acronyms. See table below for explanation of properties.

### Explanation of

<b>Label</b>	The unique name used in the Metadata Application Profile.
<b>Status</b>	Status labels for elements can include Required, Strongly Recommended, Recommended, and Optional.

<b>Description</b>	Brief description of the element.
<b>Refines</b>	The Dublin Core metadata field of which the described term is a sub-property.
<b>Repeatable</b>	“Yes” means that a field may be used multiple times in an item record; “No” means that a field can only be used once in an item record.
<b>Controlled Vocab/Syntax</b>	Recommended vocabulary for element, if available. (For data quality and consistency)
<b>DC 1.1 Mapping</b>	The Dublin Core element to which the metadata field name maps.
<b>MARC Mapping</b>	The MARC field to which the Dublin Core metadata element is crosswalked.
<b>Notes</b>	Applicable notes for the element.
<b>Example</b>	Examples of best practices for the described field.

DPLA Property	dcterms:alternative
Label	Alternate Title
Status	Optional
Description	Any alternative title of the described resource including abbreviations and translations
Refines	dc:title ; dcterms:title
Repeatable	Yes
Controlled	
Vocab/Syntax	
DC 1.1 Mapping	dc:title
Qualified DC Mapping	dc.title.alternative
MARC Mapping	246, subfield a and b; also, may use 210, 222, 240, 242, 243, and 247
Notes	The distinction between titles and alternative titles is application-specific; some titles are better known by their alternative title.
Example	The book Columbus 400 has five known alternative titles including: Business 400 of Columbus; Men of the Ohio Capital; et al.

DPLA Property	dcterms:isPartOf
Label	Collection
Status	Required when available
Description	Collection or aggregation of which described resource is a part
Refines	dc:relation ; dcterms:relation
Repeatable	Yes
Controlled	
Vocab/Syntax	
DC 1.1 Mapping	dc:relation
Qualified DC Mapping	dc.relation.isPartOf
MARC Mapping	
Notes	The term 'collection' can be applied to any aggregation of physical or digital items. It is typically used to refer to collections of physical items, collections of digital surrogates of physical items, collections of 'born-digital' items and catalogues of such collections.
Example	Ohio Postcard Collection

DPLA Property	dcterms:contributor
Label	Contributor
Status	Optional

Description	Entity responsible for making contributions to described resource
Refines	dc:contributor
Repeatable	Yes
Controlled	LCNAF
Vocab/Syntax	
DC 1.1 Mapping	dc:contributor
Qualified DC Mapping	
MARC Mapping	700, 710, 711, 720 (Added Entry – Personal name, Corporate name, Conference name, Uncontrolled Name).
Notes	Examples of a Contributor include a person, an organization, or a service.
Example	Editor: Charles W. Seward; Photographer: Herb Topy

DPLA Property	dcterms:creator
Label	Creator
Status	Strongly recommended
Description	Entity primarily responsible for making described resource
Refines	dc:creator ; dcterms:contributor
Repeatable	Yes
Controlled	LCNAF
Vocab/Syntax	
DC 1.1 Mapping	dc:creator
Qualified DC Mapping	
MARC Mapping	100 1# (Main Entry--Personal Name), or 110 2# (Main Entry--Corporate Name), 111 1# (Main Entry--Conference Name) or 700/710/711
Notes	Examples of a Creator include a person, an organization, or a service. Use Library of Congress Authorities to guide formatting of names. <a href="http://authorities.loc.gov">http://authorities.loc.gov</a>
Example	President Edmund B. Paxton; Columbus Writers Club

DPLA Property	dc:date
Label	Date
Status	Strongly recommended
Description	Date value as supplied by data provider
Refines	
Repeatable	Yes
Controlled	ISO 8601 (W3CDTF)
Vocab/Syntax	



DC 1.1 Mapping	dc:date
Qualified DC Mapping	
MARC Mapping	260 ## subfield c (Date of publication, distribution, etc.)
Notes	Date may be used to express temporal information at any level of granularity. Recommended best practice is to use an encoding scheme. Date refinements are generally useful in situations where more than one date is needed, and the difference between the dates may be important to users.
Example	1940-02-20; 1940-02; 1940; February 20, 1940

Label	Description
Status	Optional
Description	Includes but is not limited to: an abstract, a table of contents, or a free-text account of described resource
Refines	dc:description
Repeatable	Yes
Controlled	
Vocab/Syntax	
DC 1.1 Mapping	dc:description
Qualified DC Mapping	
MARC Mapping	520, 545, 300, 500, 505
Notes	Since the Description field is a potentially rich source of indexable terms, care should be taken to provide this element when possible. Best practice recommendation for this element is to use full sentences, as description is often used to present information to users to assist in their selection of appropriate resources from a set of search results.
Example	Bill Moss posed with Tina Turner and Eddie Castleberry, the program director of WVKO.

DPLA Property	dc:format
Label	Extent
Status	Optional
Description	Size or duration of described resource
Refines	dc:format
Repeatable	Yes
Controlled	
Vocab/Syntax	
DC 1.1 Mapping	

Qualified DC Mapping	dc.format.extent
MARC Mapping	300 subfield a
Notes	Because the refinement Extent is used in a variety of situations, it generally consists of both a numeric value and a caption that is needed to interpret the numeric value. Best practice is to separate the numeric value and the caption with a space, whether the caption appears before or after the value.
Example	21 minutes; 899 kb; 250 pages; 35 mm

DFLA Property	dc:format
Label	Format
Status	Strongly recommended
Description	Physical medium or dimensions of described resource
Refines	
Repeatable	Yes
Controlled	IMT
Vocab/Syntax	
DC 1.1 Mapping	
Qualified DC Mapping	
MARC Mapping	340; 856 subfield q
Notes	The file format, physical medium, or dimensions of the resource. Recommended best practice is to use a controlled vocabulary.
Example	image/gif; jpeg; drawing; photograph

DFLA Property	edm:isType
Label	Genre
Status	Optional
Description	Captures categories of described resource in a given field. Does not capture aboutness
Refines	edm:is RelatedTo
Repeatable	
Controlled	AAT ; TGM ; LCGFT
Vocab/Syntax	
DC 1.1 Mapping	
Qualified DC Mapping	
MARC Mapping	655 #7 subfield a (Index Term--Genre/Form) plus subfield 2=local (for DDCI Type); =gmgpc (for Thesaurus for Graphic Materials); =aat (for Art & Architecture Thesaurus); =lcfgt (Library of Congress Genre/Form Terms for Library and Archival Materials).
Notes	If the resource is composed of multiple mixed types then multiple or repeated Type elements should be used to describe the main components.
Example	Poems; Letters; Articles; Maps



DPLA Property	dcterms:identifier
Label	Identifier
Status	Optional
Description	ID of described resource within a given context
Refines	dc:identifier
Repeatable	Yes
Controlled	URI
Vocab/Syntax	
DC 1.1 Mapping	dc:identifier
Qualified DC Mapping	
MARC Mapping	856 40 subfield u (Electronic Location and Access/URI) Only use for mapping the main URI that refers to the resource and begins with "http."
Notes	Recommended best practice is to identify the resource by means of a string conforming to a formal identification such as an established file naming structure.
Example	0385424728 [ISBN]; Westerville_00099

DPLA Property	dcterms:language
Label	Language
Status	Required when available
Description	Language(s) of described resource
Refines	dc:language
Repeatable	
Controlled	ISO 639-2 ; Lexvo
Vocab/Syntax	
DC 1.1 Mapping	dc:language
Qualified DC Mapping	
MARC Mapping	041 0# subfield a (language code); 008/35-37
Notes	Either a coded value or text string can be represented here. If the content is in more than one language, the element may be repeated. Recommended best practice is to use a controlled vocabulary.
Example	en; en-US; eng; English

DPLA Property	dcterms:spatial
Label	Place
Status	Strongly recommended
Description	Spatial characteristics of described resource, such as a country, city, region, address or other geographical term. Captures aboutness

Refines	dc:coverage ; dcterms:coverage
Repeatable	Yes
Controlled	LCSH ; TGN ; USGS
Vocab/Syntax	
DC 1.1 Mapping	dc:coverage
Qualified DC Mapping	dc.coverage.spatial
MARC Mapping	651 #0 (for LCSH place names) or #7 with the specific vocabulary source provided in subfield 2 (TGN, for example)
Notes	Spatial topic and spatial applicability may be a named place or a location specified by its geographic coordinates. A jurisdiction may be a named administrative entity or a geographic place to which the resource applies. Recommended best practice is to use a controlled vocabulary such as the Thesaurus of Geographic Names [TGN]. Where appropriate, named places can be used in preference to numeric identifiers such as sets of coordinates or date ranges.
Example	Ohio; Columbus, Ohio; Downtown; 96 S Grant Avenue

DPLA Property	dcterms:publisher
Label	Publisher
Status	Strongly recommended
Description	Entity responsible for making the described resource available, typically the publisher of a text
Refines	dc:publisher
Repeatable	Yes
Controlled	
Vocab/Syntax	
DC 1.1 Mapping	dc:publisher
Qualified DC Mapping	
MARC Mapping	260 subfield b (if born digital) or 533 subfield c (if reformatted)
Notes	The intent of specifying this field is to identify the entity that provides access to the resource. If the Creator and Publisher are the same, do not repeat the name in the Publisher area. If the nature of the responsibility is ambiguous, the recommended practice is to use Publisher for organizations, and Creator for individuals. In cases of <u>ambiguous responsibility</u> , use Contributor.
Example	The Ohio Sentinel Publishing Company; F.J. Heer Publishing Co.

DPLA Property	dc:relation
Label	Relation

Status	Optional
Description	Related resource
Refines	
Repeatable	Yes
Controlled	
Vocab/Syntax	
DC 1.1 Mapping	dc:relation
Qualified DC Mapping	
MARC Mapping	530
Notes	Recommended best practice is to identify the related resource by means of a string conforming to a formal identification system. Relationships may be expressed reciprocally (if the resources on both ends of the relationship are being described) or in one direction only, even when there is a refinement available to allow reciprocity. If text strings are used instead of identifying numbers, the reference should be appropriately specific. For instance, a formal bibliographic citation might be used to point users to a particular resource.
Example	If an item is related or a part of another resource; for example a picture being scanned from a book than a bibliographic citation would be given to the book. Ex:Columbus Men Worthwhile: Presented in Cartoon, by Billy Ireland, OH 741.5 I652c, (p.219)

<b>DPLA Property</b>	<b>dc:rights</b>
Label	Rights
Status	Required
Description	Information about rights held in and over the described resource. Typically, rights information includes a statement about various property rights associated with the described resource, including intellectual property rights
Refines	
Repeatable	Yes
Controlled	
Vocab/Syntax	
DC 1.1 Mapping	dc:rights
Qualified DC Mapping	
MARC Mapping	506, 540
Notes	The Rights element may be used for either a textual statement or a URL pointing to a rights statement, or a combination, when a brief statement and a more lengthy one are available.
Example	A user of any image in this collection is solely responsible for determining any rights or restrictions associated with the use,

obtaining permission from the rights holder when required, and  
paying fees necessary for a proposed use.;

<http://www.photohio.org/columbus-citizen-journal-and-columbus-ci>



DPLA Property	determines:rightsholder
Label	Rights Holder
Status	Optional
Description	A person or organization owning or managing rights over the resource
Refines	
Repeatable	
Controlled	
Vocab/Syntax	
DC 1.1 Mapping	
Qualified DC Mapping	
MARC Mapping	542 subfield d
Notes	Since, for the most part, people and organizations are not typically assigned URIs, a person or organization holding rights over a resource would be named using a text string. People and organizations sometimes have websites, but URLs for these are not generally appropriate for use in this context, since they are not clearly identifying the person or organization, but rather the location of a website about them.
Example	Herb Topy; The Ohio State University

DPLA Property	determines:subject
Label	Subject
Status	Strongly recommended
Description	Topic of described resource
Refines	dc:subject
Repeatable	Yes
Controlled	LCSH ; AAT
Vocab/Syntax	
DC 1.1 Mapping	dc:subject
Qualified DC Mapping	
MARC Mapping	650, 600, 651, 610, 653
Notes	Recommended best practice is to select a value from a controlled vocabulary or formal classification scheme. Select subject keywords from the Title or Description information, or from within a text resource. If the subject of the item is a person or an organization, use the same form of the name as you would if the person or organization were a Creator or Contributor.
Example	Dogs; Airplanes; Rhodes, James A. (James Allen), 1909-2001



## Appendix G: Key Staff Resumes

**Melissa Lodge - State Library of Ohio Liaison/Interim Project Coordinator**

**Katy Klettlinger – Interim Metadata/Digital Specialist**

**Shannon Kupfer – Interim Metadata/Digital Specialist**

**Melissa Bercher Lodge**  
90 Fallis Rd.  
Columbus, OH 43214  
(614) 784-9290 home  
(614) 644-6914 work  
[alodgenssg@sbcglobal.net](mailto:alodgenssg@sbcglobal.net)

**Summary:** Team-oriented professional with thirty years library experience in federal and state setting with responsibilities for project management, grant development and monitoring, and program planning and implementation. Possesses excellent time-management, communication, and customer service skills.

**Education:**

BA The College of Wooster, Wooster, OH  
MLS Indiana University, Bloomington  
MA Indiana University, Bloomington IN  
Ohio Certified Public Manager

**Experience:**

- Associate State Librarian for Library Development, July 2010 - present.  
Part of Senior Management Team of the State Library; Manage and coordinate all administrative functions and programming activities within the department; Set priorities for the department and staff; Establish budget priorities for department programs; Coordinates and manages the state data collection program for Ohio's public libraries, manages and implements all aspects of the LSTA program in Ohio and supervises other special projects and programs impacting the Ohio library community (including strategic planning, Ohio Digital Library, and digitization initiatives); Responds to a variety of questions and concerns from Ohio librarians, library trustees, and organizations working with libraries; Represents the State Library at various meetings and programs.
- Head, Library Programs and Development, February 2005 - July 2010.  
Managed and coordinated programming activities within the department; set staff priorities; Managed day-to-day activities for the state data collection program for Ohio's public libraries, special grants, E-Rate program for Ohio libraries; Coordinated all aspects of the LSTA program in Ohio; Responded to a variety of questions and concerns from Ohio librarians, library trustees, and organizations working with libraries; Represented the State Library at various meetings and programs.
- Library Programs Administrator, March 2000 - February 2005.  
Managed and coordinated the LSTA program in Ohio including developing application materials and associated support documents, reviewing applications, monitoring funded projects, conducting evaluations and on-site visits; Maintained current information for the LSTA section of the webpage; Developed LSTA training opportunities; State Library liaison to the Institute of Museum and Library Services and wrote LSTA annual reports; Assisted in implementation of special projects impacting on the Ohio library community; Supervised LSTA staff.

- LSTA/LSCA Program Coordinator, November 1989 – March 2000.  
Coordinated the LSTA program in Ohio including developing application materials and associated support documents, reviewing applications, monitoring funded projects, conducting evaluations and on-site visits; Developed and conducted workshops relevant to LSTA; Maintained current information for the LSTA section of webpage; State Library liaison to the Institute of Museum and Library Services.
- System and Network Consultant, State Library of Ohio, May 1986 – November 1989.  
Provided consultant services to librarians making automation decisions; Monitored LSCA Title III projects; Maintained automation files; Gathered information and responded to individual library requests.
- Staff Assistant to the Director, Office of Planning and Development, Library of Congress, June 1984 – May 1986.  
Planned and performed analytical and evaluative studies of library-wide programs, organization and operations; Prepared state-of-the-art reports, statistical reports and reports on future programs; Researched background studies; led tours of the newly established digital resources and optical disk project.

#### **Publications:**

- State Library of Ohio NEWS, various articles, 1989- present.
- Victoria Reich and Melissa Betcher. "Library of Congress Staff Test Optical Disk System," College and Research Libraries, 47:4 (July 1986).
- Melissa Betcher and Robert Zich. "Library of Congress" in The 1986 ALA Yearbook of Library and Information Services. Volume 11. Chicago: ALA, 1986.
- Victoria Reich and Melissa Betcher. "Library of Congress Optical Disk Print Pilot Project Staff Evaluation" in Energies for Transition, Proceedings of the Fourth National Congress of the Association of College and Research Libraries, April 9-12, 1986. Chicago: ACRL, 1986. Reprinted as ERIC Document ED273 284.
- Melissa Betcher, "Council on Library Resources Releases Report on Optical Media Technologies" (Book Review), Library of Congress Information Bulletin, June 3, 1985.
- Daniel Melnick, Robert Zich, Catherine Croy, and Melissa Betcher. A Survey of Non-Congressional Users of the Services of the Library of Congress: A Report to the Subcommittee on the Legislative Branch, Committee on Appropriations, House of Representatives, United States Congress. April 1985.

#### **Professional Activities:**

- Speaker at various state library conferences and workshops on LSTA, Statistics, E-Rate, Technology Plans, and State Library activities
- Institute of Museum and Library Services (IMLS) State Conference Planning Committee, 2004
- IMLS Pilot State for Online Annual Report form, 2002, 2015
- Chair, Ohio Library Council Annual Conference Planning Committee, 2013
- Chair, Ohio Library Council Convention and Expo, 2014

# KATY L. W. KLETTLINGER

## EDUCATION

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Master of Library and Information Science (MLIS)  
Concentration: Archives  
Kent State University, 2006

Independent Studies: Donor Relations with Kent State University Special Collections & Archives, 2005; Study on the Effectiveness of Volunteer Run Reference Services at the Ohio Genealogical Society, 2005

Practicum: Akron-Summit County Public Library, Special Collections Division, 2006

Bachelor of Science in Education (BSE)  
Minors: History and Political Science  
Kent State University, 2004

## EMPLOYMENT HISTORY

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*August 2014-present:* **Library Consultant**, State Library of Ohio, Columbus Ohio

- ❖ Assist libraries in creating strategic plans by compiling and analyzing data, overseeing survey creation and dissemination, facilitating focus groups, and providing training
- ❖ Consults libraries with digitization initiatives by recommending software and hardware, providing training on best practices, and assisting in the selection of materials for scanning
- ❖ Serves as a project manager on library space planning projects by overseeing designs, work schedules, and furniture selection

*November 2008-August 2014:* **Records Manager & Archivist**, Licking County Government, Newark, Ohio

- ❖ Manages Records and Archives Department staff, volunteers, and interns in digital imaging, electronic records management, records storage, archival reference and preservation, and legal records disposal services
- ❖ Develops and manages department budget, secures funds for projects from other county officials, identifies cost saving measures to perform functions, oversees equipment and inventory needs, and composes grant writing
- ❖ Creates and administers records management policies including public records policies for all county agencies through training and consultations

*December 2007-November 2008:* **Local Government Records Archivist**, Ohio Historical Society, Columbus, Ohio

- ❖ Consulted local governments with records management practices such as records retention and disposition, electronic records management, disaster preparedness, and preservation practices

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## KATY L. W. KLETTLINGER

- ❖ Reviewed retention schedules and disposition lists submitted by governments and other public institutions in accordance with House Bill Nine
- ❖ Led workshops and presentations aimed towards records keepers and professional associations regarding records retention and disposition

*May 2006-December 2007: Assistant Curator, Peninsula Library and Historical Society and Cuyahoga Valley Historical Museum, Peninsula, Ohio*

- ❖ Oversaw and administered all functions of Archives Department
- ❖ Reorganized department to meet archival standards with emphasis on collection development, donor relations, appraisal, rare book and collection processing, and reference services
- ❖ Prepared exhibitions for Cuyahoga Valley Historical Museum and trained and supervised graduate students in special projects

### STATE-LEVEL PRESENTATIONS & AWARDS

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October 2015: ***Heading in the Right Direction – Creating a Strategic Plan for Your Library.*** Ohio Library Council Convention & Expo. Cincinnati, Ohio. (Provided and overview of the strategic planning process used by the State Library of Ohio, how plans benefit libraries, and tips for collecting community data for libraries of all budget levels.)

May 2015: ***Who Are These People and What Are they or Aren't They Doing in My Library?*** OhioNET hosted webinar. (Discussed why data collection is important in library decision making, reviewed scenarios library face with data resources that could assist in library planning, and how to present data visually for community and stakeholders.)

March 2015: ***Digitization...It's a Thing.*** Northeast Ohio Regional Library System Spring Workshop. Cleveland, Ohio. (Provided day long workshop on digitization for beginner which included the advantages and challenges of digitization, selecting items for scanning, best practices for technical specifications, copyright issues, vendor relations, costs, and project workflow.)

December 2011: ***Recipient of Ohio Historical Records Advisory Board Institutional Achievement Award.*** (Received award for significant accomplishments in preserving and improving access to records by salvaging historical records from the county's courthouse attic and creating a department to house them, as well as, implementing contemporary records management practices in the county).

# Shannon Kupfer

157 N. Walnut St. | Galena, OH. 43021 | 614-214-9431 | [skupfer@library.ohio.gov](mailto:skupfer@library.ohio.gov)

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## Summary of Qualifications

Librarian with over eight years of experience in a state government library setting. Extensive experience in digital collection-building and preservation. Skilled in metadata creation and cataloging, library reference, archival management, and teaching in-person and online.

## Selected Accomplishments

- Instrumental in the establishment of Ohio Memory ([www.ohiomemory.org](http://www.ohiomemory.org)) and in building a strong partnership with the Ohio History Connection.
- Supervise practicum students on a frequent basis, creatively tailoring practicum experience that meet the students' needs
- Led organizational project in the State Library of Ohio Rare Book Room, including the cataloging of hundreds of items
- Participated in ILEAD Ohio 2015 cohort and built Preserve Digital Ohio ([www.preservedigitalohio.com](http://www.preservedigitalohio.com))

## Work History

February 2016- Present	State Library of Ohio <b>Digital Initiatives Librarian</b>
October 2007- February 2016	State Library of Ohio <b>Digital / Tangible Media Cataloger</b>
February 2007- June 2007	Ohio Historical Society <b>Volunteer</b>
May 2007 July 2007	Westerville Public Library Anti-Saloon League Museum <b>Practicum Experience</b>

## Specialized Training

September 2013	Workshop: Designing Successful Grant Projects
September 2014	Workshop: Corrugated Clamshell Box
March 2015	Workshop: Library Instruction
October 2015	Workshop: Custom Book Cradles



## Education

May 2015	Certificate of Advanced Study in Digital Preservation Kent State University
August 2007	Master of Library and Information Science Kent State University
June 2006	Bachelor of Arts, History The Ohio State University
May 2003	Associate of Arts, Spanish Santa Barbara City College

## Publications

"Digitization and Digital Preservation of Government Information" in *Government Information Management in the 21<sup>st</sup> Century*, ed. Peggy Garvin. Ashgate Publishing, 2011.

"A Rising Tide of Digitization: The Ohio Memory Project" in *Computers in Libraries*, November 2010

## Statewide Initiatives

2008-2011	OhioLINK Digital Resource Management Committee Member
2010-Present	Connecting to Collections Planning Committee
2011-2012	Working Together to Support Ohio's Libraries
2011-2015	National Digital Newspaper Program in Ohio Advisory Board At-Large Member
2014-Present	Community Representative, Digital Public Library of America
2015 – Present	DPLA in Ohio Steering Committee