

Music of Social Change: Interim Report

Mid-point project report on the Emory
University project on Library-Museum
Collaboration through Open Archives
Metadata on Music and the Freedom Struggle

January 2005

Executive Summary and Highlights

The Music of Social Change Project is nearing completion of all goals and outcomes as set forth in its project plan. All project activities for Phases 1 and 2 are now complete. We are pleased to report that, after consulting with representatives from all partner institutions and with several Emory librarians, our technical staff has designed, developed, tested, and publicly released the beta version of the OAI Metadata Migrator. This software tool allows institutions to 1) convert their locally stored database records into OAI compliant format, 2) enhance those records, and 3) create an OAI provider for those records. Several project partners are now beginning to use the tool. We are also pleased to report that the project documentation, including the Collaborative Model and the Metadata Migrator User Manual, has been revised and published to the project website. Substantial progress has been made on the learning tool for communities interested in the project's subject domain of music and the African American Freedom Struggle, including several modular essays and annotated weblinks. The project website is now live at www.metascholar.org/MOSC.html, and contains links to project documentation, a downloadable software package, a search engine, and numerous annotated weblinks and contextual essays about the subject domain of music and the African-American Freedom Struggle. Over the past few months, the project staff has given several presentations about the project at such forums as SAMM and the 2004 Museum Computer Network Conference, and has received great interest in and feedback on the Metadata Migrator software. Planning currently is underway for all Phase 3 activities, and we are confident that the project will be complete by October 2005. The following are highlights of the project findings:

- **Development of a Desktop Cataloging System**
- **Production of a Collaborative Model**
- **Scholarly Website for Learning Communities**
- **On-site Meetings with Contributing Institutions**
- **Production of Training Materials**

Section 1: Development of a Desktop Cataloging System

As outlined in the original grant proposal, the Music of Social Change project has created an open source software package that allows curators (and catalogers) with desktop database management systems to 1) map, or "crosswalk," database records into Dublin Core, a common format for the dissemination of research metadata associated with digital library collections, 2) work with catalogers to add more information to these records, and 3) set up OAI providers for their collections.

During our interactions with several contributing museums in Phase 1 of the project, we learned that many small museums currently use their records only for in-house purposes. These records often contain sensitive and confidential information, including donor information, which should not be shared with the general public. Further, because these records have been created for in-house use, they rarely contain subject headings or standard public access points. In their current state, then, many museums' records are not appropriate for public use.

Nonetheless, as our conversations proved, museum personnel could envision several public uses of records that would be helpful to their missions, including for inventory tracking, inter-institutional exhibition planning, and attracting new members of learning communities for on-site visits. They identified particular needs that our

software tool would have to address, including ease of use, low time investment, the ability to enhance the data in individual and grouped fields, and the ability to easily and entirely eliminate fields of information that are too sensitive for public access. They also requested that the software contain a full user's manual that can help curators and other professionals to understand each step of the conversion process and the setting up of an OAI provider.

In keeping with these requests, we designed the desktop software system such that curators can easily eliminate sensitive fields from the OAI compliant records. Through this system, museums can move publicly useful information about collection items to an online database, while keeping the full, sensitive records intact in their own separate and restricted accession lists. We also designed the system to enable curators or collaborating catalogers to easily enhance information in individual records or across an entire field of the collection.

The Metadata Migrator tool allows institutions to make their locally stored records available for online searching. By mapping field names in the institution's own records to Dublin Core elements, the Metadata Migrator creates XML records that metadata harvesters can search and retrieve. This allows the collections to be searched from a central OAI database system that is freely available for research conducted on the internet—thereby allowing learning communities to discover primary resources that are currently hidden or difficult to access.

The successful beta release of this open source software facilitates both Outcome 1 and Outcome 2 from the original project proposal.

Section 2: Production of a Collaborative Model

The Collaborative Model details how museums can collaborate with libraries and other institutions by means of the OAI-PMH. Ideally, this model should guide museums through the collaborative process, providing them with the tools and solutions needed for successful partnerships with libraries and other institutions, as well as with an outline that can be used in the creation of new projects and the construction of project proposals and grant applications. Though the model focuses primarily on museums as collaborators, a range of educational institutions (such as historical societies) are implicitly considered in this process and encouraged to place themselves within such collaborative endeavors.

The Model includes sections on the following topics: 1) scenarios and benefits of implementing collaborative OAI systems in museums and libraries; 2) museum metadata practices, and how they relate to libraries and the OAI protocol; 3) process model for planning collaborative projects with libraries and other institutions; 4) roles and responsibilities key to successful collaborations; and 5) technical implementation and software resources.

We are including a copy of this document as part of this interim report. It is also available online through our project website, at <http://www.metascholar.org/MOSC.html>. This document directly supports Outcome 1 from the project proposal.

Section 3: Scholarly Website for Learning Communities

The Music of Social Change website (<http://www.metascholar.org/MOSC.html>) provides a model site for the use of the OAI Protocol as the cornerstone of a multifaceted learning tool. In this website, we are creating a virtual collection of topically related items held by multiple institutions. The intellectual content of the site pivots around its harvested collections, which focus on the subject domain of music and the African American Freedom Struggle. Scholars have now produced and published short, modular essays using the primary research documents that are featured in the site. These essays are intended to guide learning communities through some of the site's most exciting primary documents and to demonstrate some of the ways that they can be used to better understand the relationship between music and social change.

This website is being constructed to allow groups of researchers and independent learners to gain systematic online access to often overlooked but substantial archival materials housed by museums, as well as related archival materials held by research libraries in this subject domain. We anticipate launching the research collections on the site by March of 2005.

The website is divided into five main sections: about, collections, weblinks, essays, and search. In the “about” section, visitors can gain familiarity with the project’s goals and activities, explore the Collaborative Model and other valuable documents, and gain access to the beta release of the Metadata Migrator software and its accompanying user guide.

The “collections” section will soon include OAI records from all of our contributing institutions. Learning communities can browse through these collections by institution or can search across collections for documents pertaining to a particular subject area. Many of these records are currently being enhanced by catalogers at Emory University in fulfillment of Outcome 2 of the project goals.

The “essays” section now includes a body of scholarly material that contextualizes the primary resources available through this site concerning the music of the freedom struggle. Written by PhD candidates Katherine Skinner, Liz Milewicz, and Paul O’Grady, these resources are intended to provide a guided tour through the site’s virtual archives for learning communities and independent researchers alike. More materials will be developed by these scholars over the coming months as new collections are added to the site.

In the “weblinks” section, learning communities will find an extensive listing of annotated web resources related to music and the African American Freedom Struggle. These resources have been selected according to stringent guidelines for their value in scholarly research.

The “search” page contains a search engine that will search by material type (i.e., essays, primary documents, weblinks) or across material types. This will allow users to quickly reach the information they seek through this site.

The scholarly website has been developed in accordance with Outcome 3 from the original project proposal.

Section 4: On-Site Meetings with Contributing Institutions

We have continued to meet regularly with our original contributing institutions to discuss the progress of the project’s Collaborative Model, its Metadata Migrator software, and its scholarly website. These conversations have continued to bolster our understanding about the fundamental differences in metadata practice at libraries and museums. We have come to understand that the central difference is that museums think of metadata primarily as a staff tool for asset management, whereas libraries and archives look at metadata primarily as a public tool for gaining access to collections. Often, this difference makes collaboration between museums and libraries challenging, as most museums do not yet consider the sharing of metadata as a high institutional priority. We have worked to demonstrate in the Collaborative Model a series of scenarios in which museums stand to benefit from the use of OAI, particularly through inter-institutional collaborations.

Our continued meetings with these institutions and conference calls with Tim Cole and Sarah Shreeves (University of Illinois at Urbana-Champaign) have furthered our understanding of what curators need from a software program that converts database records to Dublin Core format. We have designed the software tool so that it is easy for a person with low technical skills to use. We built in features that allow a curator to easily select which fields of their records should be converted and made public and which should not be converted for public use. This helps to allay a major concern of curators, who use their database records primarily as accession lists that often include such sensitive information as valuation, donor details, and item location. We are continuing to consult with Cole and Shreeves, as well as our contributing institutions, as we prepare a second version of the software for release in March, 2005.

We had a highly successful meeting with a new contributing institution, the Highlander Research and Education Center of Tennessee, in November, 2004. The Highlander presents a new use-case for the

Metadata Migrator toolkit and for the Collaborative Model. Due to the sensitive nature of the materials generated by the Highlander over the last century, especially those related to labor movements and the civil rights movement, the Highlander often moved pieces of its collections to off-site safe havens. Although the Harry Lasker Memorial Library remains the Highlander's principal repository, with over 6,000 books and hundreds of videotapes, audiotapes, periodicals, and research files, they also have significant collections of primary documents at Tennessee State Library and Archives, the Wisconsin State Historical Archives, and Appalachian State University. The Project Manager met with Susan Williams of the Highlander to discuss using the Metadata Migrator software to enable the Highlander to virtually reunite its important collections of civil rights materials. Over the next six months, we plan to work with Wisconsin State Historical Archives, the Tennessee State Library and Archives, and Appalachian State University to identify relevant records from their collections for inclusion in this project.

Williams has provided Emory with a complete download of the Highlander's records, and the project team is currently working with Williams to process and map these records into Dublin Core for inclusion in the Music of Social Change site. The project manager also spent several days working with Williams to produce archival quality digital scans of rare photographs and publications housed at the Highlander. These materials will be included with the OAI records as digital surrogates with enhanced contextual information provided by catalogers at Emory University.

We have also scheduled a meeting at the University of Mississippi's Center for the Study of Southern Culture that will include two other contributing institutions, the Delta Blues Museum of Clarksdale and tentatively, the University of Southern Mississippi, for January 21, 2005. This will provide us the opportunity to follow up on discussions with Charles Reagan Wilson of the Center for the Study of Southern Culture (CSSC), Chuck Bolton at the University of Southern Mississippi, and Greg Johnson and Jennifer Ford at the Delta Blues Archive concerning the inventory records held by these institutions. Johnson, Ford, and Wilson will be using the Metadata Migrator software to convert their local records into OAI compliant format.

Our work with continuing and new contributing institutions fulfills Outcomes 1 and 2 of the project goals.

Section 5: Production of Training Materials

The project staff has prepared an instructional packet for training archivists, museum curators, librarians and other professionals in the use of the adaptable Metadata Migrator tool. This user guide packet is available both as a PDF document on the project website and as a help file linked to each page of the Metadata Migrator. Using text and screenshots, it leads the user through each step of the process of converting metadata from a database system into Dublin Core format and setting up an OAI provider for that metadata.

The project staff has also drafted a more extensive set of training materials that will include the Collaborative Model, the Metadata Migrator User Guide, Guidelines for Shared OAI Cataloging Practices, and a Guide to Website Development to assist archivists, museum curators, librarians, scholars and other professionals in the creation of new learning tools in concentrated subject domains. The Music of Social Change project website serves as a model site for future projects of this type. These training materials support Outcome 1 and 3 of the project goals.

Section 6: Next Steps

We are excited to move into the final stages of this project. Over the next six months, we plan to launch the research collection portion of the scholarly website, produce a second version of the software package, and finalize the training materials that will be distributed to archivists, museum curators, librarians, and other professionals. We are currently planning the final assessment and distribution activities, which will take place between March and July, 2005. As part of the project assessment, we are planning a final project meeting with all contributing institutions for May, 2005, during which we will administer a usability test of both the Metadata Migrator and the project website, and will hold focus groups concerning the degree to which we have successfully enabled new forms of collaboration between museums and libraries during this project.

The Music of Social Change project is making steady progress in advancing library-museum collaboration through the OAI-PMH. Once again, we thank IMLS for providing us with this opportunity to promote collaborative activities between library and museum communities.

Appendices

Appendix A: Project Staff

Martin Halbert, *Principal Investigator*: Martin provided the overall definition of the Music and Social Change project and other projects in the MetaScholar Initiative and continues to oversee its progress. He is Director for Library Systems at Emory University.

Katherine Skinner, *Project Manager*: Katherine has helped to plan the project, and has provided much of the analysis of our findings from project meetings with contributing institutions. She has also helped to direct the development of the Metadata Migrator software, and has written much of the project's documentation to date. A doctoral candidate at Emory University whose work focuses exclusively on music and social movements, she designed and implemented the project website and authored much of its current content.

Susan Bailey, *Librarian*: Susan is Director for Bibliographic Gateway Services at the Emory University General Libraries, and oversees all cataloging activities. She has participated in many of the conversations we have had with contributing libraries, and is currently working with several institutions' data for metadata enhancement purposes. She is employed part-time on the project as a contribution by Emory University.

Urvashi Gadi, *Project Research Assistant*: Urvashi is a master's CS student at Emory. She helped to design and develop the Metadata Migrator software, which has now reached its beta release. She will continue to improve this software for its second release, slated for March of 2005. She is employed part-time on the project by IMLS grant funds.

Jia Liu, *Project Research Assistant*: Jia worked on the evaluation and deployment of the Greenstone digital library software as a possible tool or plug-in to use for the enhancement of metadata converted with the Metadata Migrator. Jia is a math PhD student at Emory. She was employed part-time on the project as a contribution by Emory University.

Johnny Healey, *Project Research Assistant*: Johnny administers the server that houses the Metadata Migrator software and that hosts collections when the contributing institution so desires. He also evaluates, customizes, and deploys various digital library components (such as the search engine we are using on the MOSC website). In addition, Johnny is participating in the design, construction, and evaluation of MetaCombine experimental systems. Johnny is a master's CS student at Emory. He is employed part-time on the project as a contribution by Emory University.

Liz Milewicz, *Project Research Assistant*: Liz brings her training as a librarian and her theoretical work on library culture to bear on the project. Liz works closely with the project manager on the documentation for the site, including the Collaborative Model and the Metadata Migrator training materials. A doctoral student in Cultural Theory and History, Liz also contributed to the academic content of the website. She is employed part-time on the project as a contribution by Emory University.

Appendix B: Collaborative Model