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Exploratory Evolution: Using Participatory Change to Rethink and Reorganize Digital Collections Services

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Biz of Digital — Exploratory Evolution: Using Participatory Change to Rethink and Reorganize Digital Collections Services

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Change is the only constant in digital collections work. Evolving technologies, resources, and needs require a constant flexibility in not only what work is done, but how and by whom. Over the course of the 2017-2018 academic year, **Grand Valley State University Libraries** held a series of facilitated conversations to analyze the workflows, organizational structure, and overall support for the management of digital collections and repositories. This article summarizes the facilitation process and highlights areas of opportunity, aspirations, and future directions.

Located in Allendale, Michigan, **Grand Valley State University** is a comprehensive liberal arts institution with approximately 25,000 students. The University Libraries supports the curriculum by connecting students to information and resources at five diverse physical locations across three campuses.

University Libraries' digital collections previously existed in two departments, Special Collections & University Archives and Collections & Scholarly Communications. Technical support for the collections was provided by two additional departments responsible for systems, technology, and resources. Special Collections & University Archives created digital collections in order to provide increased access to the department's unique materials, including historical photographs, moving images, oral histories, and manuscripts. Collections & Scholarly Communications developed digital collections of faculty publications, theses, dissertations, open educational resources, and journals using the institutional repository and a suite of library publishing services.

While both departments have become increasingly collaborative in recent years in efforts to improve the usability of digital resources and better serve library users, the inter-departmental nature of the work led to ambiguous project leadership and difficulties with resourcing. In order to strengthen this collaboration, a Digital Objects Working Group, consisting of faculty and staff representation from all involved departments, was established. Working Group members, however, balanced primary job responsibilities with shifting priorities and timelines inherent in digital projects.

University Libraries took the opportunity of new leadership and staff changes to reevaluate the function and the sustainability of digital collection workflows. The Dean of University Libraries began a facilitated process, drawing on Appreciative Inquiry[1] and Design Thinking,[2] to help establish a clear and efficient set of practices for digital collections work. This facilitation framework used guided conversation and participatory activities to identify strengths, redundancies, and challenges.

Over the course of eight months, the Working Group participated in five general phases of co-creation towards implementing a new structure for digital collections work:

Phase 1: Analyzing functional tasks performed by each member and necessary skill sets

Phase 2: Analyzing peer and aspirant institutions' approaches to digital collections

Phase 3: Identifying an ideal state and developing a feasible state for the future

Phase 4: Analyzing public-facing and collection management tasks and necessary skill sets

Phase 5: Consulting University Libraries' and external stakeholders on creation of a feasible state

Several phases of the facilitation process sought to identify job similarities and knowledge gaps that had developed as separate digital collections programs evolved. Analyzing individual activities revealed intersections between Working Group members' areas of responsibility. This enabled the group to begin reimagining how their services, programs, and collections might be restructured to better share expertise and resources.

The facilitation process incorporated card-sorting and visualization exercises to affirm shared professional values and identify opportunities for growth, as well as break down job activities. For example, the team created functional categories, such as "Collection Development" and "Digital Curation," and listed all tasks that fell into those areas regardless of which department performed them.

These discussions revealed areas that could benefit from more formalized collaboration. For example, the scope of institutional repository services has been largely defined by the repository software, while digital archives projects have had more flexibility and more intentional negotiation with partners. A shared approach to establishing the scope and capacity of services will allow repository staff to draw on established processes as technology evolves, and will enable better communication with potential campus partners about what University Libraries can support.

Considering digital content work from a functional standpoint revealed opportunities to improve communication between members. Terminology was a challenge in a past migration of archival content into the institutional repository, with key terms like "series" having specific and different meanings for an archivist and a repository manager. The task analysis allowed members to see similarities that had been previously obscured by terminology or past practice, which will also improve future collaborations.

Initially, identified tasks were mapped to a common model of the Digital Curation Lifecycle,[3] and many group members' core responsibilities fit within the cycle. As discussion continued, however, it became clear that the model could not accommodate all activities. Programmatic responsibilities like strategic decision-making, promoting collections, and project planning do not directly involve the curation of individual digital objects, but are nonetheless essential for that curation to occur. Similarly, digital curation is related but not central to many education, outreach, and

collection management activities performed by team members. Conducting archival appraisal and description, providing workshops on copyright and scholarly publishing, or building relationships with campus partners all occur whether or not any digital objects are involved.

Incorporating multiple lenses for analysis was vital to authentically reflect all of the work performed by group members. The multimodal approach ensured a more complete discussion as the Working Group moved towards a new organizational structure. These additional perspectives reaffirmed the distinctive characteristics of each previously separate department, but also presented more opportunities for task-based collaboration.

In addition to looking inward, the Working Group reviewed the infrastructure, content, and organization of digital collections programs at peer and aspirant institutions. The review showed that **GVSU's** digital collections had developed in similar ways as peer institutions, particularly in the use of the *Digital Commons* institutional repository platform and *CONTENTdm* for digital special collections. University Libraries' collections, however, often contained more digital objects, with a greater diversity in subject matter, content types, and file formats than peers. The University Libraries' recent move to *Omeka*, a locally-supported, open source platform for digital special collections was more in line with aspirational models.

Among peer institutions most tasks associated with digital special collections were performed within a Special Collections and/or Archives department, while institutional repository and publishing programs were managed by a Scholarly Communications, Digital Scholarship, or Publishing department or librarian. Organizational charts and department directories were generally unclear about where responsibilities for digital preservation lay. Among aspirational institutions, particularly those with higher staffing numbers and a stronger research focus, digital collection work was frequently managed by a self-contained department or unit that combined all of the collection management tasks for both digital special collections and the institutional repository. Ultimately, looking at other institutions' organizational models and achievements reinforced the Working Group's growing consensus that closer formal organization could catalyze improvements to current practices and opportunities for new initiatives.

As a result of the facilitation process, University Libraries decided to move members from each involved department to a newly envisioned Collections & Digital Scholarship department, under the leadership of the Associate Dean for Curation, Publishing & Preservation Services.

This new department separates individuals' organizational position from their physical area of work, allowing a formal alignment of shared expertise across medi-

Past Organizational Structure

Future Organizational Structure
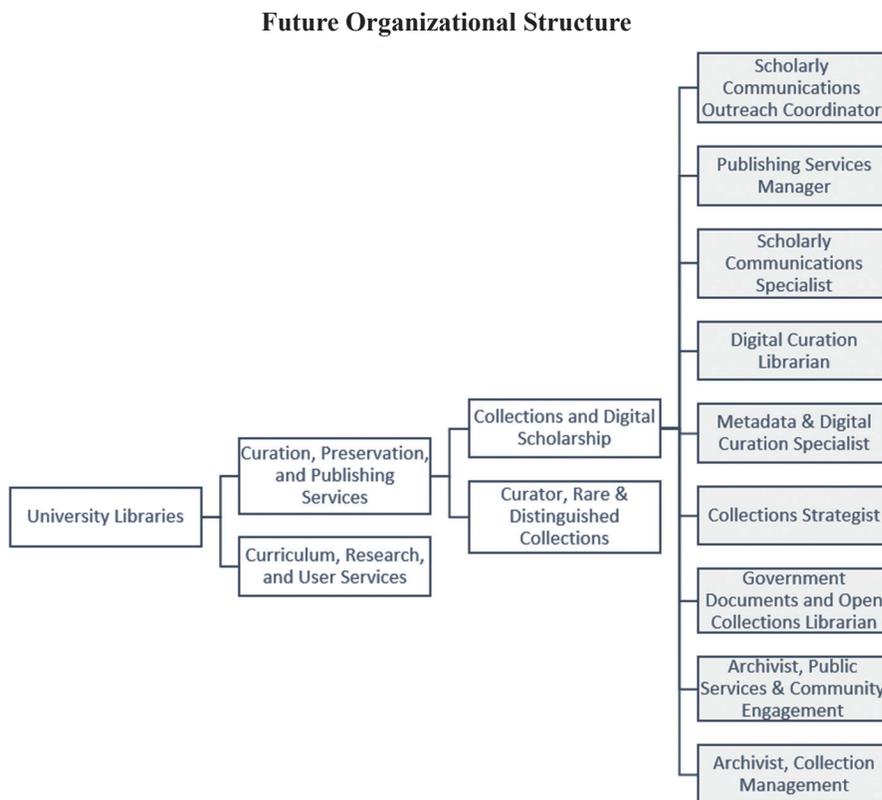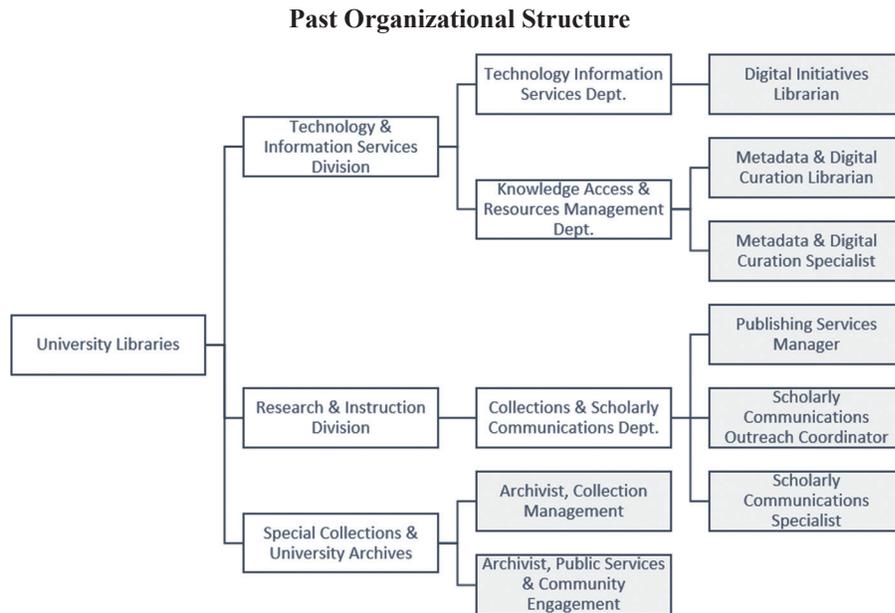
ums and formats. It provides infrastructure for the project-based nature of the work, and integrates all collections, from general to rare, under shared vision and leadership. The shift enables a greater collaborative approach and formalizes resourcing. Areas of work that will become closer with this integration include the management of, and engagement with, general, special, and digital collections; digital scholarship; developing and maintaining partnerships; scholarly communications; and expanding publishing services.

This process also highlighted the need for increased clarity of responsibilities for each functional specialist on the team. More work still needs to take place to evaluate existing job descriptions, clarify roles, reduce unnecessary overlap, and build in needed redundancies in areas of collection management, digital collection and metadata creation and maintenance, and outreach and community engagement. Using the information gathered during the facilitated discussions, University Libraries'

administration also presented a hiring plan to address some of the knowledge and support gaps identified. The plan adds two new positions, a Collection Strategist and a Data Visualization Specialist, to the department. In addition, two roles have been redesigned as a Government Documents & Open Collections Librarian and a Curator for Rare Books & Distinguished Collections. University Libraries will also leverage new membership in the **ACRL** Diversity Initiative to gain a Digital Scholarship Fellow, who will focus much of their work on digital collections, open collections, and data in the university's teaching and learning.

Individual teams will still maintain distinct areas of focus within the greater department structure. For instance, the Special Collections & University Archives identity remains necessary, both as a physical place and a specific body of collections, for students learning archival research techniques and for campus offices managing long-term records. Recognizing and valuing the areas where practices differ for valid reasons will enable a healthy balance between department-wide collaborations and services that are most effective when tailored to a particular context or need.

University Libraries values a strong culture of collaboration. The new Collections & Digital Scholarship department provides support for stronger internal collaborations, which complements ongoing work building and maintaining relationships outside the department. These important collaborations enable University Libraries to respond quickly to emerging trends and challenges.

While the facilitation process focused on the importance of creating sustainable workflows for digital collections work, it also demonstrated the many strengths and similarities between areas of responsibility previously divided. Ultimately, the envisioned Collections & Digital Scholarship department will prioritize digital collections in a new and innovative way for **Grand Valley State University Libraries**.[4]

Endnotes

1. **Sue Annis Hammond**. *The Thin Book of Appreciative Inquiry: 3rd Edition*. (Bend, OR: Thin Book Publishing Co., 2013.)

2. **Scott Doorley** et al, "Design Thinking Bootleg 2018," Hasso Platner Institute of Design at Stanford University, *https://dschool.stanford.edu/resources/design-thinking-bootleg*. Accessed July 17, 2018.

3. "The DCC Curation Lifecycle Model," Digital Curation Center, *http://www.dcc.ac.uk/resources/curation-lifecycle-model*. Accessed July 17, 2018.

4. A white paper discussing the facilitation process in greater detail is available online: **Annie Bélanger** et al., "Establishing a Shared Vision for an Integrated Approach to Collections and Scholarly Communications," March 6, 2018, *https://scholarworks.gvsu.edu/library_reports/1/*.