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Leveraging Cataloging and Collection Development Expertise to Improve OER Discovery

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CLARE SOBOTKA received her MLS from Indiana University in 2013 and currently works as a Reference Assistant at Linn-Benton Community College's Healthcare Occupations Center in Lebanon, Oregon. She does a bit of everything from circulation, cataloging, reference, and information literacy instruction to tech help. She is also part of the Quality Team for Oregon's statewide library chat service, Answerland.

HOLLY WHEELER is an MLIS graduate of the iSchool at the University of Wisconsin-Madison and a long-time midwesterner. In 2018, she was delighted to finally return to her home state of Oregon and join the team at Mt. Hood Community College as the library's Cataloging and Metadata Specialist. She has long been interested in the overlap of cataloging and technology. When she's not wrangling metadata, she enjoys spending time with her family and cat, reading the many books that follow her home from work, and embroidering.

HEATHER WHITE graduated with an MLS from the State University of New York at Buffalo in 2004. She began her library career in Buffalo as a high school librarian responsible for, among other things, cataloging in Dewey; she made the jump to academic libraries in 2006 as a reference and instruction librarian, which brought her to Portland, OR in 2007. Technical Services has always been her primary career interest, so when she was hired as the Library Technical Services & OER Coordinator for Mt. Hood Community College Library in 2011, she was relieved to be back in her niche.

Introduction

While there is ongoing improvement in some of the larger open educational resources (OER) search engines, librarians sending emails to listservs asking "anyone know of OER on this topic?" and keeping old-fashioned reading lists of valuable OER are common occurrences. Compared to searching for books in a library catalog or scholarly articles in a research database, finding OER wherever they may be is challenging even for librarians, not to mention instructional faculty. The reason is technical: subpar and variable metadata in OER search engines leads to difficulties searching, capturing, and sharing data across repositories. In other words, the current lack of robust, descriptive metadata for OER results in fewer access points. Thus, OER are comparatively hard to find.

Bibliographic control for purposes of information storage and retrieval is something librarians are experts in, but we have not shared our methods with the Open Education community yet. So far, the majority of library advocates for OER have been reference and instruction librarians, as well as library directors. This is great, and we need them to continue to champion OER creation and adoption, but the Open Education movement needs technical services librarians to step forward and apply their cataloging and systems administration expertise to streamline access to the sprawling landscape of OER content; our profession would do well to share our collection development expertise as well. To this end, Clare Sobotka, Reference Assistant at Linn-Benton Community College (LBCC), Holly Wheeler, Library Cataloging and Metadata Specialist at Mt. Hood Community College (MHCC), and Heather White, Library Technical Services & OER Coordinator, along with their colleagues, have started to experiment with creating collection development policies and MARC records for OER. Ultimately, they hope for the development of a metadata schema that is shared between the Open Education and library communities and is mapped to MARC and RDA, to improve both catalog records and OER search engines across the web.

Collection Development

One of the first questions to ask is: what sort of OER is appropriate to add to my library collection? Adding OER isn't necessarily in the scope of every library, but MHCC wants to add OER published by MHCC faculty the same way they would with any commercially published work by their faculty. They also want to add high-quality OER gathered from various sources across the internet to build a special collection in direct support of college instructional programs. LBCC also wants to increase the discoverability of OER so faculty can search their catalog, see what OER are being used or have been used in the past, and adopt them if desired. Students should be able to access the library's OER collection with ease for research and personal interest as well (with the possible exception of testing banks and other ancillaries). Curating an OER collection within the library decreases barriers to affordable textbooks by gathering high-quality OER from across the internet, often from places non-librarians may not think to look. Furthermore, adding OER to the library collection promotes them as high-quality resources to campus communities, thereby curbing the misguided notion that OER might be lower in quality than commercially published works: items found through scholarly library resources have a legitimacy that search engine results do not. At both institutions, when a colleague determines one particular OER should be added to the library catalog, the item is given to the cataloger. MHCC uses an internal Lib-

Guides webform that asks for access and publication data, along with subject terms before it is sent to cataloging. At LBCC the process is more informal; the item to be cataloged is added to a spreadsheet or mentioned in an email.

Shared Challenges

When deciding what metadata to track in OER bibliographic records, neither MHCC nor LBCC librarians found best practices or many examples to go on. Both teams were immediately concerned that a lack of cataloging guidelines across institutions may reduce MARC record usefulness if access points are not standardized across local OPACs and OCLC. A lack of MARC standards for OER causes unique OER to have multiple and inconsistent bibliographic records. This, in turn, causes faculty, staff, students, and research librarians to have inconsistent search experiences and technical services librarians to have more local cataloging rules to follow. It defeats the goal of discoverability. Furthering the issue is the inconsistency of metadata in OER. Examples include non-standard ways of using creation, publication, and edit dates, variation in expressing open licence types, lack of place of publication, and sometimes even a lack of authors and contributors. Another hurdle is a lack of remix or revision statements, not only to inform version control decisions, but to help faculty determine which version of an OER they might want for their course and why.

LBCC

At LBCC Library, we formalized our efforts to catalog OER and alternatives to traditional textbooks in 2017 with the arrival of our first OER and Textbook Affordability Librarian, Michaela Willi Hooper. Willi Hooper and Jane Sandberg, LBCC's Electronic Resources Librarian, began planning a systematic approach to cataloging OER to make them findable in our OPAC, Evergreen. For a time we kept a list of OER used at LBCC in a LibGuide, but it became unwieldy and was not easily searchable.

There are three types of resources we are including in our OER cataloging efforts. We pull in texts provided by our e-book and database vendors that are used by faculty to provide no-cost textbook alternatives; even if these are not OER, they are a component of our textbook affordability efforts, and we enhance the bibliographic records with course information to consolidate students' discovery experience. In addition to subscription resources, we catalog OER from the web and OER created by our instructors, housed in our institutional repository, CommunityArchive@LBCC. Our separate discovery layer already included records from the UMN Open Textbook Library that may or may not be in use by instructors, but adding them to our library catalog allowed us to enhance them. At this time, the only resources being cataloged are full texts or chapters. Print and electronic records are separated, and all records are RDA. In the beginning, Willi Hooper and Sandberg settled on several MARC fields to add to or modify in bibliographic records, with indicators, subfields, and their accompanying set values and style. Most of the record importing, editing, and creation has been done by Clare Sobotka, who found that additional fields and rules were needed for original cataloging of OER. It's worth noting that within the Linn Libraries Consortium, LBCC is the sole academic library and currently the only library

cataloging OER, and so has great flexibility in describing them (in the absence of a county-wide library district, multiple Linn County Libraries banded together to share resources and a catalog).

The first MARC fields agreed on were a 653, a modified 856, a 971, and two 972s. These were added to all MARC records imported from OCLC into Evergreen. The 653 tag signals an uncontrolled index term. We assigned only one to each record based on the resource's location within a subscription service or the open web: "653 \\ $aLibrary Online Textbooks" OR "653 \\ $aOER." Unfortunately, "Library Online Textbooks" may not be intuitive; we were uncertain how to overcome that. Originally, we were going to spell out OER as Open Educational Resources, but decided OER was a more likely search term. This metadata may differ across libraries, decreasing discoverability in the catalog by people from other institutions. The only addition to the 856 field, Electronic Location and Access, was to add a note that it was an LBCC access point with a subfield $9: "856 40 $uURL $9LBCC $yClick here to access this e-book." $9 is a special-entry control subfield that's normally not useable with an 856, but our ILS Evergreen does allow it.

Finally, we decided to add three local fields to improve findability and consistency based on the needs of our campus. We added one 971 and two 972s that are indexed in our catalog and were already used with our cataloged course reserves: the "971 \\ $a" with the instructor's name in Lastname, Firstname format, a "972 \\ $a" with the name of the course in all caps, and a "972 \\ $a" with the course number with no spaces. This means that students can check the library for their textbooks, and instructors can see what has been used in their department. We decided not to update the list of instructors each term or each year due to lack of staff power and the difficulty of tracking instructor changes; instead, we'll review on an as-needed basis.

While doing original cataloging, two other fields proved necessary to add context to the bibliographic records. Information regarding copyright status, 542, was where a note on Creative Commons Attribution licenses seemed to fit well: "542 1\ $f," and since "655 \4 $aElectronic books" was included in many imported records, we decided to add that as well.

When the first few MARC fields were agreed on, LBCC tracked those decisions in a shared Google doc. As we began creating original catalog records in OCLC Connexion, we wanted a template with the most common MARC fields and repeating metadata (like RDA fields 336, 337, and 338) so we wouldn't have to continuously move between documents copying and pasting. We utilized Connexion's "online constant data," which allows a user to create a form to hold frequently used data and apply it to bibliographic records in OCLC (see figure 1). Standard workflow involves creating a new book bibliographic workform, erasing all pre-set fields, then applying the online constant data with fixed and variable fields before entering data (see figure 2). Since it is saved online, anyone at LBCC can use it and it isn't workstation-specific. After some trial and error, original cataloging of OER is much more efficient using this tool; however, the fields specific to LBCC—the term in 653, $9 in the 856, 971, and 972s—could not be included in OCLC, dampening its usefulness.

Figure 1. LBCC's online bibliographic constant data for OER in OCLC Connexion that can be applied to OCLC workforms. Notice that the local fields that LBCC adds: 653, 865 $9, 971, and two 972s are not included.
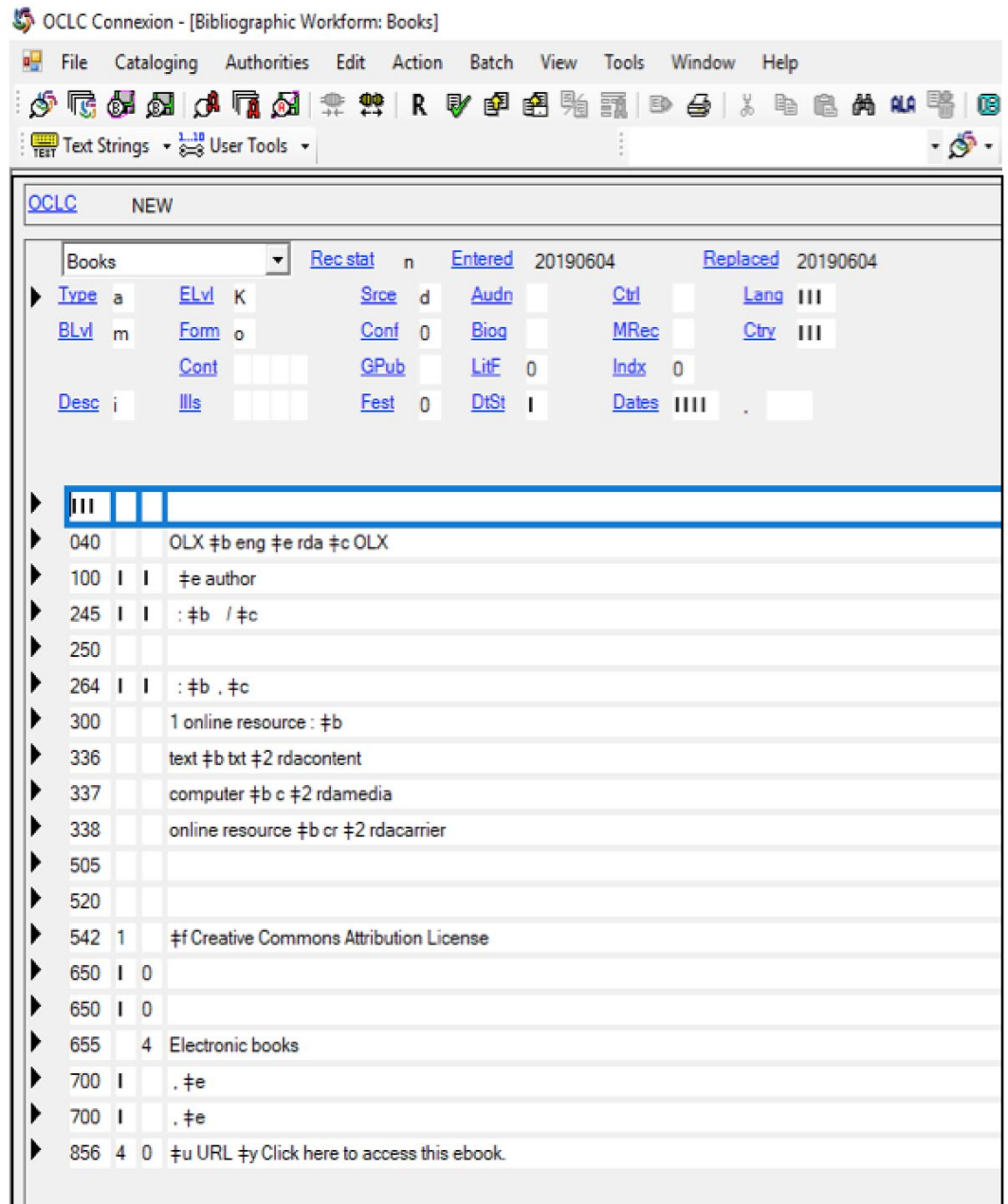
Figure 2. The bibliographic workform in OCLC Connexion after the constant data has been applied, but prior to entering metadata.

MHCC

At MHCC, we began our OER cataloging project with three groups of OER in mind: open textbooks created by our faculty, print and electronic versions of OpenStax textbooks, and other relevant OER from places like Open Textbook Library and the Rebus Community. Some of the latter two types of OER were already cataloged by other institutions in MARC records, which gave us a starting point for creating our MARC template.

To begin, we looked at the MARC records available from the Open Textbook Library (Open Textbook Library, 2018). We noticed there were not any fields in use to specifically indicate that the material are OER. The records all included 542 fields with the license (usually Creative Commons), but otherwise were fairly basic and straightforward e-book records. From there, we looked in OCLC Connexion to see how the OpenStax books were cataloged. Due to the collaborative nature of OCLC, there was a lot of variation in the records. However, we saw records with 540 fields with Creative Commons attribution statements and 653 fields with either "OER" or "Open educational resources," which helped set us on the path of standardizing our template.

We wanted our MARC records to designate the items as OER in a searchable field, and we decided to make use of two different fields to accomplish this. As we had seen in other records, we used the 653 field with a second indicator of 6 to record both "OER" and "Open educational resources" as uncontrolled genre/form terms. Although one or the other would likely suffice, we made the decision that until the larger community had settled on a controlled version of the genre, we would make use of both to aid in discoverability. Additionally, we used the 380 field to record "Open educational resource" as the form of work, using the full name to fit the pattern of other uses of this field.

One of the major pieces we wanted to include in all of our records was the Creative Commons attribution statement which includes the license type. Given that Creative Commons licenses govern use, distribution, and adaptations, it seemed that the attribution statement fit better into 540 "Terms governing use and reproduction" rather than the 542 "Information relating to copyright status," so we settled on the 540 field.

A relationship we wanted to include, especially for our collection of OpenStax books, was print and electronic copies of the same work. Again, MARC made this easy, as it is already quite commonplace to use the 776 field to link either a print or electronic copy of the same work. Unfortunately we face challenges in generating an actual link in our OPAC, Primo (Ex Libris), which seems to require some additional configuration of Alma and Primo in order to make this functional.

Given that one of the major ideas behind OER is the ability to reuse and adapt portions of it to create new materials, we needed a way to track these changes and communicate them to the OPAC user. Lucky for us, MARC has an array of fields for displaying relationships between works. Thus, we were able to use the 787 field quite easily to link original and derivative works. This has also been a challenge to display in the OPAC.

Another field we included specifically for our catalog display was the 506 field to create an indicator that the resource is open-access. This is a feature of Primo that many academic libraries throughout the Orbis Cascade Alliance library consortium have implemented, so we followed suit. This was achieved using the phrase "Unrestricted online access" from the Standardized Terminology for Access Restriction (STAR) list (OCLC, 2007).

Conclusion and Wider Efforts

It is clear that MARC records have tremendous benefit for articulating detailed metadata and relationships between works in a way that's lacking within OER databases that do not operate with such a detailed bibliographic record infrasture. Despite working independently, both MHCC and LBCC came up with similar ideas and field usages. Both institutions use the 653 "OER" field and included open license information, albeit in different fields. This points to shared goals and needs for cataloging OER that likely extend beyond our two libraries. That being said, LBCC placed more emphasis on local fields, while MHCC included no local information, to follow cataloging guidelines of a shared ILS environment, where local information is handled separately from the bibliographic records.

So far, faculty love seeing their OER fully cataloged in our collections, and it contributes to their OER's scholarly credibility. It remains to be seen, however, if library-cataloged OER collections will prove a useful tool for OER discoverability and implementation among faculty unfamiliar to the practice. Marketing efforts to alert them of this growing special collection are needed. More work needs to be done on the scope and vision of an OER special collection, or textbook affordability collection that includes library-subscribed content. Perhaps these could be built collaboratively through library consortiums that share bibliographic records, such as the shared catalog model that is becoming more common these days.

Our field would benefit from more technical services librarians collaborating with OER content creators and repository managers on how library cataloging can capture OER metadata to solve challenges, such as inconsistent publication data. Other challenges to work on include: having a matchpoint or unique identifier between a library's MARC record and its listing in an OER database, such as OER Commons; how to catalog entire OER courses and individual curricular modules, such as those from Lumen Learning and LibreTexts respectively; and agreeing to controlled vocabulary so faculty can search multiple platforms by learning objective or course outcome and have a consistent discovery experience. Anyone interested in working on these and other challenges may contact Heather.White@mhcc.edu to join a group of technical services librarians and OER database administrators working to set these metadata standards and build bridges between library OPACs and non-library OER databases.

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