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Annual Report for 2018 and Goals for 2019

I. Significant Activities in 2018

Digital Strategies is a new office in the Library, but one that seeks to build on our past successes. Its establishment puts into practice recommendations from the 2014 Report, “Organizational Restructuring In Support of Strategic Leadership.” Specifically, the Office of Digital Strategies supervises the following units/areas, 1) Library IT; 2) Preservation and Conservation, including digital preservation; 3) Discovery and Delivery Services; 4) User Experience; and 5) The Rare Book and Manuscript Library. I work closely with people in these units, with the other AULs, and with the Dean, to pursue the Library’s objectives, but Digital Strategies also includes connections to every Library Unit. In addition, I have responsibility for assisting with academic affairs in the Library, including appointments, promotion/tenure, sabbatical processes, and faculty development.

Each person in the Library and affiliated with the campus—as well as many other people, including, indirectly, every citizen of the State—has a stake in the success of the Library’s digital services and future directions. Entering this position, I have a lot to learn about their needs. As an organization, we have established track record in leading digital services, and many people have played a role in our accomplishments. Since I assumed the role of AUL for Digital Strategies on November 1, 2018, it seems premature to list and describe “significant accomplishments.” Instead, I will use this report to outline and describe my activities during November and December of 2018, with the understanding that many of these will continue into 2019 and beyond, helping to set the stage for the Library’s collective future accomplishments.

- A. Team Building.** I have attempted to use my first two months in this position to set a tone of collegiality, collaboration, and team building, to build confidence in the work I hope to do coordinating digital strategies work and to encourage faculty and staff in their professional growth. In the short term, my work as an AUL has meant meeting with people, asking questions, and listening to the responses—as well as offering opinions and suggesting direction when I felt capable of so doing. I met multiple times with people in the units I supervise and throughout the Library, as well as with the Dean, the other AULS, and people in other Library units. I plan make ongoing outreach a priority in 2019, including to people outside of direct reporting units.
- B. Orientation.** I spent significant time learning about issues affecting the units that report to me, seeking at the same time to ensure a smooth transition to new reporting structure. I’ve also sought advice from Dean Wilkin, Tom Teper, Cherie’ Weible, and those who are directly familiar with past unit work and issues.
 - a. Library IT.** I directed a great deal of quiet effort toward the staff of Library IT, which has been led for the past three and a half years by Tom Habing, with Jim Dohle playing a critical role in guiding production services. Under their direction, Library IT has operated effectively and effectively managed with a reduced operations budget. However, the unit faces continuing pressures, related both to increased IT demands and flat resourcing. IT has weathered some recent staff losses and the potential

impacts of the SUCSS class redesignations for new positions. In addition, IT is shifting more operations to cloud-based services and Infrastructure as a Service (IaaS) wherever feasible, a move that requires significant retooling and skills development but does not decrease local staffing needs. To the contrary, an opportunity for new and engaging professional experiences. In the short term, I worked with IT staff to assure staffing consistency and clear communication both within the unit and to the Library as a whole. I am pleased that in spite of the dual change (new AUL and new head of IT within two months), the initial transition went smoothly, setting the stage for the initiatives and goals discussed in the goals section of this report.

- b. **Discovery and Delivery Services.** Building on work previously completed to transition Michael Norman to his new leadership role, I consulted extensively with Michael and helped finalize the ILS migration team with additional members and slightly revised charge. Since our catalog-based discovery and delivery environment is, relatively speaking, a new area to me, I read as much as I could about the likely issues to be encountered, and I've tried to keep the Library informed of progress with the CARLI/ExLibris contract, with clear, concise, and well-timed communications. In addition, I've been working with CARLI (i.e. Anne Craig) to continue cultivating the strong CARLI connections I was fortunate enough to inherit from others in the Library. Collectively, we have set our feet on a solid platform for partnerships with CARLI during the ILS migration and also, potentially, for a shared IR and digital repository service to be developed in the next 2 years.
- c. **User Experience.** Meeting weekly with John Laskowski, I sought to understand his existing work process and his important role in helping Library units develop effective, engaging web services. John plays a critical bridge role in helping translate unit hopes and dreams into practical plans and designs, while ensuring consistency with good web accessibility and UX practices, not to mention satisfaction with our services. I seek to help John bring his expertise to bear in additional ways over the next few years, including both discovery and access systems and— to the extent possible given resource limitations—our physical infrastructure.
- d. **Preservation/Conservation.** While the work of Preservation is more directly familiar to me than that of some of the other units in my area, I worked to orient myself to the, work process, budget, and staffing issues that affect the unit's services, which require highly specialized skills, equipment, and training. While the Preservation/Conservation unit has an unquestioned reputation for success and for effective service delivery in everything from book binding to digitization, it is important for me to understand how current operations function, and to work with Jennifer Hain Teper and her staff to seek out additional resourcing opportunities. I hope, for instance, that we can build out shared services around repository and digitization efforts, scoping out these services during the upcoming year, in close consultation with Jennifer's team, as well as people in many other Library units.
- e. **Rare Book and Manuscript.** Again, I've been pleased to meet with Lynne Thomas and others as the unit moves toward higher staffing levels after a few years of transition. While my past work in the Special Collections Division gives me some familiarity with RBML operations and issues, I recognize a great need to understand subtle and not-so-subtle differences in practice between RBML and Archives. Both the similarities and the differences will need to be taken fully into account as we look to address Library-wide issues like special collections digitization, inventory control, arrangement and description, 'born-digital' processing, and assessment.

During this orientation period, I attended as many RBML events as possible, as well as a staff meeting, to get a sense for the unit's initiatives and work styles, and also because I am interested in playing whatever role I can in helping to mentor staff in this unit and others. I also consulted with Tom Teper, who will continue to play a key advisory role in helping me and Lynne with collection issues, given his expertise and budgetary role with collections.

- f. **Administration.** As a member of the Library's leadership team, I participated in a series of standing meetings with the University Librarian, other AUL's and Cabinet. Specific outcomes included a deeper understanding of our operational environment, current issues facing the Library, and budget processes. I also consulted regarding library advancement and marketing issues. In addition, I met with EC and provided updates on transition to the new AUL role and IT transitions in particular. Finally, I began the process of developing an Office of Digital Strategies Website and public presence.
- g. **Academic Affairs.** To begin scoping out work in this area, I worked with David Ward to transition sabbatical administration from EC to the Associate Dean role. I met with Rosa Milagros ("Amy") Santos, Associate Provost for Faculty Development, who described Provost office support and provided guidance on college-level faculty development efforts that the Library might pursue. In addition, I examined our specialist core competencies with Cherie' Weible and Sara Holder, and began gathering awards opportunity information, with the help of Lucretia Williams; this information will be made available shortly. Finally, I began working with a group charged by EC to examine and improve our search documentation and processes, building on past work done by many others, and recognizing the flexibility needed to handle changing circumstances.
- h. **Develop Mission and Vision.** The unit heads who report to me and I drafted the following vision statement for Digital Strategies. This will be used as a focal point for developing shared work and unit goals, and offers a general statement of the philosophy we'd like to pursue as a group. In the short term, this feeds into the goals I've listed below, but in the longer term, I am working with the team to articulate unit specific goals.

"The Office of Digital Strategies seeks to foster an inclusive digital services culture. We value collective efforts and operate efficiently to anticipate and meet the specific needs of Library users. We join with faculty, staff, and students to enhance the Library's reputation for applied and innovative research relating to all areas of library and archives practice across formats, with a particular focus on digital collections, discovery and delivery, preservation services, access and accessibility, interoperability, systems integration, and user experience. We are firmly rooted in the Library's physical and digital collections, the intersections between them, and the relationships, scholarship, and knowledge that people build using them."

C. Other Areas

- a. **Project work -**
 - i. Monitor Archon service commitments and oversee project to tweak Archon's MARC output for ingest to catalog and federated search, in conjunction with Tom Teper, MJ Han, and Willie Kries.
 - ii. Monitor transition of Accessibility Checker and IT Accessibility efforts
 - iii. Assist with Web Developer search committee as temporary chair

- iv. Consult reference services group concerning faculty profile database, representation of subject expertise, and research consultation scheduler
- b. **University Archives.** In the transition period into my AUL role, I continued to provide some support for archives services, a duty which has gradually declined, and which will continue at a reduced level in 2019, given long-term projects in which I was involved. In 2018, including areas of effort prior to November, my work in the Archives include the following major areas of activity, not in order of relative effort or significance: 1) Reference support 2) Oversight of analog and digital processing; 3) Consultation regarding digitization projects and Paul Schroeder gift; 4) Direction of ALA and 3rd Armored Division Archives; 5) Consultation regarding website issues, and establishing project to use standard WordPress server and Library theming system; 6) Oversight and direction of web archives program and mentoring of Jessica Ballard; 7) Development of capstone email procedure (with Brent West); 8) Development of Policy and Process for preservation of digitized copy of Chancellor's Office Subject File and destruction of paper files (with Brent West and Kathie Yee-Benko); 9) Oversight of ALA Archives; 10) Coordination of University Admin records assessment (Henry attic project); 11) Coordination of processing for Department of Crop Sciences Subject File; 12) Assessing and advising on processing of ACES Video files; and 13) Oversight of American Library Association Archives; 14) co-PI of NEH Cybernetics Thought Collective Project <https://archives.library.illinois.edu/thought-collective/>; and 15) Appraisal of university records for potential acquisition.
- c. **Professional Service.** The majority of my 2018 service work consisted of editorial direction I provided as Publications Editor and Chair of the Publications Board for the Society of American Archivists. This includes, at present, oversight and direction for 26 active book or case study projects. Additional details are noted in my vita. In addition, I presented at several conferences; taught a two-day workshop, "Arranging and Describing Digital Records," at the University of Washington; developed a workshop on email archives (taught at IPres in Boston); taught a graduate seminar at the Newberry Library's Mellon-supported Course, "Archive: Theory, Form, Practice"; prepared for an American Historical Association Conference panel comment on the destruction of government records (presented 5, Jan. 2019); and contributed to Interpares Trust Project NA-22, Arrangement and Description in the Cloud, including development of checklist for use of cloud-based services in archival arrangement and description.
- d. **Campus Service.** My major 2018 service commitment was as mentor for IPRH Training in Methods for Digital Humanities (TDMH) group and Dr. Anita Chan, as well as in evaluating and advising the National and International Scholarship program on potential Fulbright applicants. I also spoke on a History Department panel regarding non-traditional careers for history PhD students, participated in Public History Group, and provided a History Soapbox talk on a favorite book, Henry George's *Progress and Poverty*.
- e. **Research Outcomes -**
 - i. Task Force on Technical Approaches for Email Archives. July 2018. *The Future of Email Archives*. Council of Library and Information Resources. 120 pages. Available: <https://www.clir.org/pubs/reports/pub175/>. I served as co-chair of the Task Force and as co-editor of report.

- ii. Giovanni Michetti, Chris Prom, Richard Pearce-Moses, Kat Timms, "Role and meaning of arrangement and description in the digital environment," In *Trusting Records in the Cloud*, London: Facet (2019, forthcoming). 8 pages in manuscript.
- iii. Drafted 2nd edition of *Preserving Email*, to published by Digital Preservation Coalition in Technology Watch Series. The draft was submitted in December 2018 and is currently under peer review. 49 pages in manuscript.

II. Personal Vision for My Work as an Associate Dean

I seek to use my time as Associate Dean to foster a digital service culture that values both the collective efforts and the individual achievements of all Library faculty and staff, while efficiently identifying and meeting Library user needs related to our digital services. I intend to focus on the following areas:

- Supporting and valuing individual contributions and leadership opportunities for faculty and staff, while helping align those contributions with organizational needs
- Working to help people enhance our services and developing new means to meet known needs
- Helping to enhance Illinois' reputation as leaders in applied and transformative research related to digital services and access to collections.
- Effectively and collaboratively prioritizing particular services at particular times (i.e. completing projects in the right order and helping shape projects so they better meet documented needs)
- Helping demonstrate the value of library services by building on and improving existing use metrics
- Learning how to become a better leader, and coming to a deeper understanding of how my thoughts, attitudes, and actions can help advance the Library's and other people's interests. Practice feedback taking, self-reflection, introspection, and personal improvement.

III. Major Individual and Collaborative Goals for Calendar Year 2019

- A. **Expand personal knowledge base of unit operations.** Continue process of learning about work and issues in my areas of my responsibility. Consult widely with unit heads, as well as campus IT staff in related areas, such as Technology Services, NCSA, CITL, and ATLAS.
- B. **Foster effective communications and relationships.** Build on existing communication pathways regarding my areas of responsibility and the Library as a whole. Solicit input from affected parties, ensure input and feedback is taken into account, be transparent regarding policy and service changes, anticipate and avoid issues, and solve problems efficiently and fairly as they arise.
- C. **Support ILS Migration.** Promote the activities of the the ILS Migration Team, assist in setting timelines and goals, help ensure good group dynamics, and provide Michael Norman and the entire team with leadership and retooling opportunities. Use Vanguard phase of migration to identify major anticipated problems. Seek to head them off during 2020 production migration and transition to Alma/Primo.
- D. **Establish IDEALS Rebuild Team and Develop Targets.** Work closely with Heidi Imker, Kyle Rimkus, Ayla Stein, and Seth Robbins to establish a project structure, timeline and goals for the rebuild of IDEALS as a service hosted on our Medusa architecture. The process will

require close collaboration with our many internal stakeholders (for example, the Graduate College and Prairie Research Institute) as well as external partners such as CARLI.

- E. Assess IT Skills and Needs.** Working closely with Tracy Tolliver and others, assess current staff skill sets, interests and needs. This work will have a dual focus: identifying potentials for growth and skill development, and identifying targeted gaps that can be considered in light of future hiring. In both cases, the overriding goal is to help IT staff develop additional connections and investment in the outcomes of projects that are collectively owned by faculty and IT staff. Help to provide meaningful, fulfilling experiences both for IT staff working with faculty and for our end users.
- F. Assist Library Assessment Efforts.** Learn more about past and current library assessment efforts, learning analytics and user privacy. Work closely with Cherie' Weible, Jen-Chien Yu, William Mischo and others to develop additional methods by which we can assess library service provision to particular colleges and programs, in support of current budget models.
- G. Leverage Linked Open Data and Agents Expertise.** Form a working group to discuss shared interests in establishing linked open data functionality in our local systems, as a means to centralize resources about University of Illinois Faculty, staff, and units.
- H. Explore New Technologies.** Emerging technologies that can help the Library advance our collective mission. These include, but are not limited to machine learning/entity extraction, data analytics, linked open data, virtual reality, and repository services. In particular, I plan to work with other faculty and staff to submit a grant application under the Amazon Research Grants program, to explore the use of AWS services to improve metadata in our Repository architecture, using AWS services. Similarly, I hope to explore the use of advanced computational methods to assist the BTAA libraries in selection for Google book scanning projects, with help from Technology Services and NCSA.
- I. Support Library Building Project.** Monitor and assist in work of Collection Management WG and the Programming the Main Library WG, as well as the Special Collections WG, to being work shortly. Advise on IT-related issues that arise, and help the working groups consult with library and campus stakeholders.
- J. Assist Rare Book and Manuscript Library.** Continue working with Lynne Thomas and new staff (including digitization coordinator Ana Rodrigues) to help improve digitization workflows. Collaborate with Tom Teper, Lynne and other on RBML Barcoding Projects and Aeon integrations.
- K. Support Media Commons and IDEA Lab.** Work with Cherie' Weible, David Ward, Bill Mischo, Eric Kurt, Tracy Tolliver and others to explore sustainability options for emerging technology needs. Explore VR support needs and campus initiatives.
- L. Foster CARLI Connections.** Build on our strong relationships with CARLI, through regular meetings and interactions with Anne Craig, Kris Hamerstrand, and other staff members. Explore possibility for shared repository service, on cost recovery basis.
- M. Mentor and Support Personnel.** In Academic affairs role, develop faculty development mechanisms that leverage campus resources. Mentor junior faculty and academic professional staff as individual needs and possibilities arise. Use professional development funding to support targeted areas for investment in new skills (including but not limited to emerging technologies, cloud/Infrastructure as a Service, Digital Preservation and Repositories, Security, UX, and Born-digital processing).
- N. Explore IA Scanning of archival materials.** Work in close concert with Digital Preservation staff and subject specialists to explore ways that IA scanning process might be adopted for scanning of 'medium' rare materials such as archives, research data, and similar formats.
- O. Help develop and implement improved workflows.** Help special collections units and digital

preservation program align and expand digital processing workflows.

- P. Prioritize IT projects and encourage continued shift to IaaS.** Working with Tracy Tolliver and her staff, identify and where appropriate, move locally hosted IT services to cloud applications, to increase efficiency and (hopefully) use staff time more effectively.
- Q. Continue Forming Office of Digital Strategies** – Continue to build building connections within units aligned with my office, give space for Discovery and Delivery and UX in particular to align more closely with other Units, given their status as one person units
- R. Engage with CAPT.** Become more deeply involved in CAPT work and support various CAPT subgroups. Help ensure teams doing CAPT related work report-out process and utilize capt structures to overcome potential pitfalls.
- S. Advance My Research and Publication -**
 - a. Complete DPC Tech Watch Preserving Email Report (currently under peer review)
 - b. Finish formats analysis paper (co-authored with Kyle Rimkus, Bethany Anderson, and Karl Germeeck) and submit to American Archivist
 - c. Submit article on results of Turyn project, Arrangement and Description of Cloud Resources
- T. Continue Professional Service Profile -**
 - a. Complete term as publications editor and chair of publications board of Society of American Archivists; transition new board chair, ensure successful completion of multiple in process book manuscript including *Creating Family Archives*, *Trusting Records in the Cloud*, and *A Matter of Facts: The Value of Evidence in an Information Age*. Secure SAA Adoption of Fulcrum Digital Publishing Platform
 - b. Refine and Teach Workshop: Email Archives: Theory to Practice at SAA Annual Meeting and International Council of Archives 2019 Meeting
 - c. Establish project structure and evaluation process for Email Archives regrant program, to be administered by CLIR and funded by major private funder (with Kate Murray from Library of Congress and with support of Andrew W. Mellon Foundation).
- U. Continue Campus Service.** Continue and strategically enhance campus profile, through IPRH and other outlets.