2015 Smathers Libraries Strategic Opportunities Grant
APPLICATION COVER SHEET
Application due: October 16, 2017, 5:00PM

Principal Investigator (PI) Name: Suzanne Stapleton

_X_ Check here if this is your first grant application where you will serve as a principal investigator (PI).

Department: Marston Science Library Email: suzanne@ufl.edu Phone: 352-273-2715

Additional project applicants, please give name, email, and brief role for each:
Chelsea Dinsmore, chedins@uflib.ufl.edu, Co-PI
David Van Kleeck, dvankleeck@ufl.edu, Cataloging & Discovery guidance
Laura Spears, laura.spears@ufl.edu, Assessment
Laura Perry, lauraperry@ufl.edu, Digital records management
Robert Phillips, podengo@ufl.edu, IT consultant

Title of grant project: Discovery and usage of digital items with enhanced metadata: a test case of machine-aided indexing

Project abstract (no more than 100 words):

This project complements digitization of the historic Florida Cattleman & Livestock Journal. A controlled comparison of Access Innovation’s machine-aided indexing will provide a unique contribution to development of best practices for digital records metadata. Metadata in a sample of these new digital records will either include additional Dublin Core descriptions (enhanced metadata) or not (control). After publicizing the digital initiative, an assessment of discovery and usage will be conducted, using Google Analytics landing page statistics. Results of the project will inform best practices for future digital initiatives, particularly for specialized collections.

Funds requested (Limit of $5,000): $4,925
Describe how the 10% mandatory cost share will be met (be specific):

Please list the library resources/departments needed for this project and the name of the person authorizing the intended use and date authorized. Each authorizing person must initial their approval and confirmation of the availability of resources for this project. If you need more room, continue on a separate page.

<table>
<thead>
<tr>
<th>Departmental Resources Required for Project as applicable including cost share contributions</th>
<th>Chair or Authorizing Individual</th>
<th>Approving Initials</th>
<th>Date Authorized</th>
</tr>
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<tbody>
<tr>
<td>Chelsea Dinsmore</td>
<td>Ben Walker</td>
<td>10/17/17</td>
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<tr>
<td>David Van Kleeck</td>
<td>Patrick Reekes</td>
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<td>Laura Spears</td>
<td>Judy Russell</td>
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<td>Laura Perry</td>
<td>Chelsea Dinsmore</td>
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<td>Robert Phillips</td>
<td>Ben Walker</td>
<td>10/17/17</td>
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<tr>
<td>Suzanne Stapleton</td>
<td>Amy Buhler</td>
<td>10/16/17</td>
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</tbody>
</table>
I confirm receipt of approvals from all project team members to participate in this project as described in the narrative and budget:

[Signature]

Date: 10/16/17

I support this project and approve the assignment of the described duties to the PI.

[Signature]

Date: 10/16/17

Dept. Chair Signature
a) Project Description

The project team seeks $4,925 in SOP funding to assess the benefits of enhanced metadata in digital records in a newly digitized collection of the University of Florida Digital Collection (UFDC). The success of a digital repository such as the UFDC “depends in large part on the quality of its metadata” (Windnagel, 2014; Ininkaye et al 2012). Metadata is critical to the success of a digital repository; it “performs similar core bibliographic functions” to online catalogs and databases in “finding, identifying, selecting, and obtaining items” (Park 2009 in Yang). “Academic libraries have invested much time and effort in developing digital collection and institutional repositories, and having insight into how these digital assets are discovered by search engines is necessary and helpful” (Yang, 2016). This project is designed to accompany the digitization initiative, Preserving Florida’s Agricultural History: Digitization of the Florida Cattleman & Livestock Journal. Discoverability and usage of a sample of newly digitized items will be compared for records with and without enhanced metadata. Metadata enhancement will be based on machine-aided application of controlled vocabulary terms added to the records with Access Innovations’ Data Harmony software, a new resource for the UF Libraries.

b) Project Importance

Metadata enhancement is labor-intensive and thus, expensive. Yet insufficient or inaccurate metadata impedes item discoverability. There is on-going debate on the best practices to edit metadata efficiently. Park and Brenza suggest that “utilization of semi-automated metadata generation is critical…and may be unavoidable in the future considering the costly and complex operation of manual metadata creation” (Park and Brenza, 2015). This project will explore the benefits of machine-aided indexing to enhance descriptive metadata of new digital records in a side-by-side comparison to basic digital records of similar items. This project will create a test case to explore the impact on discoverability and usage of digital resources with enhanced metadata. Landing page visits reported by Google Analytics will be used to measure discovery and usage. The results of the project will contribute to the UF Libraries’ strategic directions for digital and digitized collections to “create efficient systems and workflows to facilitate the creation and management of accurate and appropriate metadata for Library resources.” The results will also address stated needs in the information science discipline, for example, “[T]here is a critical need to devise efficient and cost-effective ways of creating bibliographic records (Park and Brenza, 2015).

The Florida Cattleman & Livestock Journal provides a unique record to the evolution of Florida’s cattle industry, an influential industry on the historic development of the state. The journal documents changes in ranching practices through articles by UF/IFAS faculty, farmers, oral historians and advertisements. Influential families in Florida history are often featured, as many have been involved in cattle ranching. Open access to these archives will help fulfill FCA mission to preserve and educate the public on Florida’s rich and unique ranching history. These new digital items will expand the UFDC collection in historic agriculture publications.

c) Innovative Components of Project
This project includes several innovative components. It will be one of the first test cases of the machine-aided indexing software developed by Access Innovations used at the UF Libraries. Also, the assessment design to compare use of new digital resources with and without expanded Dublin Core descriptions offers a unique opportunity to inform development of best practices for metadata with patron-driven behavior. Results from this project will contribute to the broader professional discussion of best practices for digital initiatives.

d) Similar Projects

**Texas Tech University:** In an effort “to test the effectiveness of metadata on online resource discovery by search engines” Yang analyzed a sample of Texas Tech University Libraries institutional repository after migration to DSpace was completed in 2013 (Yang, 2016). Google Analytics was used to retrieve data, sort internet searches and analyze keywords used by patrons for online searches. Yang compared “each randomly selected keyword against the associated digital item’s metadata value to determine the matching rate for metadata elements”. Yang concluded that “Dublin Core elements Title, Description, and Subject contain values that have most matched keywords and result in most landing visits to the digital repository. The finding indicates that these three metadata elements play the most significant roles in facilitating discovery of digital items by Internet search engines.” Yang recommends librarians “input more detailed and precise information in the Description fields” for greater discovery. Yang acknowledged that further research is needed to determine if similar conclusions are reached from other digital repositories.

**Drexel University:** To address the “critical need to devise efficient and cost effective ways of creating bibliographic records”, Park and Brenza evaluated the “techniques, features, and function” of 39 open source semi-automatic metadata generation tools (2015). Park and Brenza conclude that “significant local efforts will be required to integrate the various tools into a coherent set of a working whole”.

This project will build on the research at Texas Tech University and Drexel University by testing the impact of enhanced metadata generated with machine-aided indexing from Access Innovations in the UFDC. Similar to Texas Tech University, this project will use Google Analytics landing page statistics to indicate discoverability and usage of digital items. However, in this project, a comparison of sample records with and without enhanced metadata will be conducted. Dublin Core description metadata will be enhanced with additional index terms partly generated by machine-aided indexing software from Access Innovations. Similar to work at Drexel University, this project aims to identify efficient and cost effective methods to create digital bibliographic records but unlike the work at Drexel University, this study will evaluate a commercial metadata generating product.

e) Resources Needed

Resources needed and committed to complete this project include personnel costs for training, development, implementation and assessment. This work will largely be performed by an OPS Graduate Student under supervision of PI Suzanne Stapleton and Co-PI Chelsea Dinsmore. Additional guidance will be provided by Dave Van Kleeck, Laura Spears, and Laura Perry from the UF Libraries and several individuals representing the Florida cattle industry (Robert Stone, Dwayne Johnson UF/IFAS, Tom Harper FCA). Additionally, Robert Phillips, UF Libraries will provide IT consultation. Access Innovations’ Data Harmony XIS software will be used for the machine-assisted application of controlled vocabulary terms to the digital records.
f) Project Plan of Action

The project team will disseminate information learned from this project as guidelines for best practices for metadata management for other digitization projects. Results will be shared through presentations and a final report within UF Libraries and summarized in a paper for publication in the field of digital librarianship.

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<thead>
<tr>
<th>Project Timeline</th>
<th>2017</th>
<th>2018</th>
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<tr>
<td>Activities</td>
<td>Nov-Dec</td>
<td>Jan-Feb</td>
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<tr>
<td>• Identify random sample of 10-20 journal issues to include in project; half of the items will have terms added to Dublin Core description (metadata enhanced) and half of the items will not (control)</td>
<td>PI and CoPI</td>
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<td>• Initiate project thesaurus, incorporating terms from National Agriculture library Thesaurus and CAB Thesaurus</td>
<td>Project Team</td>
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<tr>
<td>• Develop assessment procedures to measure discoverability and usage using Google Analytics landing page statistics</td>
<td>PI, CoPI, and Assessment Librarian</td>
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<td>• Hire and Train OPS Graduate Student</td>
<td>PI and OPS</td>
<td></td>
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<tr>
<td>• Develop, test, and refine controlled vocabulary, machine-aided index terms and authority records</td>
<td>Project Team and OPS</td>
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<tr>
<td>• Add Dublin Core description terms to digital records of items in enhanced metadata group of random sample</td>
<td>OPS</td>
<td></td>
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<tr>
<td>• Perform quality control check of metadata</td>
<td>PI, CoPI, Laura Perry and OPS</td>
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<tr>
<td>• Develop publicity for new digital collection (online exhibit, social media, trade journal article)</td>
<td>PI and OPS</td>
<td></td>
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<tr>
<td>• Assessment of usage of digital records with and without enhanced</td>
<td>PI, CoPI, and Assessment Librarian</td>
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</table>
g) Collection for Project

Historic issues of the journal will be digitized for the first time in 2017-2018 with copyright permission from the publisher, the Florida Cattleman Association (FCA). Print editions of the journal are owned by UF Libraries, located in SASC, MSL and FLARE.

h) Measurements of Success

The project will lead to two final products: one, an online exhibit featuring the newly digitized *Florida Cattleman & Livestock Journal* as an addition to UFDC collections and two, a report of recommendations for best practices in metadata enhancement based upon lessons learned from this project. In particular, this project will provide a test case for the use of machine-aided indexing using Access Innovation’s Data Harmony software. Usage of items with index terms added to Dublin Core description metadata fields will be compared to usage of items without this enhanced metadata. Results of this project will help to guide selective efforts in digital libraries to improve the search experience, addressing an identified assessment need (Ochoa et al, 2014). Success will be measured in development of best practices based on accurate assessment of the impact of machine-aided indexing on usage of the newly digitized *Florida Cattleman & Livestock Journal*.

i) Dissemination

Best practices for metadata enhancement with machine-aided indexing will be disseminated to UF Librarians in presentations at the conclusion of the project. Results of the project will also be described in an article submitted for publication in the field of information science.

j) Long-term financial implications

There is no expected long-term cost of this project. Results from this project will inform continued use of Access Innovation’s Data Harmony software.

k) Plans for purchases at conclusion of project

There will be no equipment or supplies purchased with these funds.
2017 Smathers Libraries Strategic Opportunities Grant

*Discovery and usage of digital items with enhanced metadata: a test case of machine-aided indexing*

**BUDGET NARRATIVE**

a) Provide a detailed explanation for how each expense was calculated.

An OPS Graduate Student will be hired for two terms for 308 hours at $15.00 per hour costs $4,620.00, plus $305.00 in fringe, for a total of $4,925.00.

The total amount requested for this project is $4,925.00.

b) Provide a justification for each expense required to carry out the project.

The OPS Graduate Student will provide the bulk of the labor to identify a representative sample, develop and test controlled vocabulary/thesaurus, enhance metadata of digital records, and develop publicity of newly digitized collection. The work will be high level and detail oriented; knowledge of agriculture will be beneficial.

c) Provide a detailed explanation of the PI’s role vis-à-vis effort (does not qualify as a cost share match).

The PI, Suzanne Stapleton, will be responsible for coordinating all project activities with project team members. The PI will work closely with project team members to accomplish project activities as detailed in the proposal narrative. The PI will be the primary supervisor and responsible for hiring and directing the OPS Graduate Student. It is estimated that the PI will spend an average of 2 hr/week or 5% FTE during the grant period on this project.

d) Provide a detailed explanation of the contributed cost share by project team members toward the required 10% matching requirement.

The 10% matching cost share requirement will be met by the total annual salaries (salary plus fringe) of each project team member multiplied by their estimated cost share of 1%. Project Team includes colleagues from Digital Support Services, Chelsea Dinsmore (cost share $1,064.00) and Laura Perry (cost share $674.40), from Catalog & Discovery Services, David Van Kleeck (cost share $699.80) and from Library Administration, Laura Spears (cost share $899.86). Total contributed cost share for the project is $7,079.
1. **Salaries and Wages (no fringe benefits required)**

<table>
<thead>
<tr>
<th>Name of Person</th>
<th>Salary times % of effort</th>
<th>Grant Funds</th>
<th>Cost Share</th>
<th>Total</th>
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<td>Stapleton, Suzanne</td>
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<td><strong>OPS-$15 X 20 hrs/PP X 15.4 PP</strong></td>
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2. **Equipment**

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3. **Supplies**

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4. **Travel**

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5. **Other (Vendor costs, etc. Provide detail in Budget Narrative section.)**

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<tr>
<th>Item</th>
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**Total Direct Costs (add subtotals of items 1-5)**

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<tr>
<th>Grant Funds</th>
<th>Cost Share</th>
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<tr>
<td><strong>$4,925.00</strong></td>
<td><strong>$7,079.00</strong></td>
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I am writing in support of the Strategic Opportunities Grant submitted by Suzanne Stapleton. Its goal is to evaluate the use of machine-assisted application of controlled vocabulary terms to digital records for issues of the Florida Cattleman & Livestock Journal. This grant will significantly increase the amount of data with which the Libraries can assess the value of using Access Innovations’ Data Harmony XIS software and will help to measure its impact on discoverability and use of these and other digital resources held in UFDC collections. The Libraries have made a commitment to help develop and use this cutting-edge technology and this grant will provide an excellent use case to assess its implementation.

I have been active in contributing to the development of the Access Innovations initiative at UF since preliminary discussions began with the company. This grant will allow me to further aid in its progress by assisting with the development, testing, and refinement of terms to be added to the digital records enhanced by the software. It will also allow me to assist in the development of recommended best practices for its use by UF staff.

The long-term use of this software could potentially involve multiple departments in the Libraries and become an important tool for increasing discoverability of digital resources. Accurate assessment of its merits and building best practices for its use will be critical for the initiative’s success. This grant will greatly assist in these efforts.

Thank you for your consideration of this proposal.

---

David Van Kleeck  
Interim Chair  
Cataloging Services Department  
George A. Smathers Libraries  
University of Florida
Hi Suzanne,

Please consider this a letter of commitment to working with the research team with you and Chelsea Dinsmore as co-PIs for the Enhanced Metadata for the Florida Cattleman & Livestock Journal Project. I think that the project is an exciting opportunity to pilot the Access Innovations initiative and is focused enough to provide both specific UF results but also some generalizable findings. I look forward to working on this project, should it be funded by the 2017 Smathers Libraries Strategic Opportunities Grant program.

Thank you,

Laura

Laura I. Spears, MSLIS|PhD
Assessment Librarian
University of Florida Smathers Libraries
LWS19
(352) 273-2711
October 13, 2017

Dear Grants Management Committee,

Please accept this as a letter of support for the assessment of enhanced metadata of digital records of the Florida Cattleman & Livestock Journal. As the UF Digital Collections (UFDC) continue to grow, the metadata within the system becomes more and more important. This project would allow us to better understand the needs for enhanced metadata and how to implement it. This project fits well within the Libraries strategic directions, under the category of digital and digitized collections as it will focus on providing users with improved ease of use and discoverability. I am certainly willing to assist the project team with understanding the technical aspects of the project, as well as implementing the enhanced metadata.

Thank you,
Laura Perry

Digital Support Services
George A. Smathers Libraries
University of Florida
October 13, 2017

Suzanne Stapleton
Agricultural Sciences & Digital Initiatives Librarian
Marston Science Library
University of Florida
Gainesville, FL 32611

Dear Suzanne:

I write in support of your grant application for the project to assess the benefits of metadata of digital records, specifically the digitization of *The Florida Cattleman and Livestock Journal*.

In my service as co-curator and principal documentary photographer for the 2,400 square foot multi-media traveling exhibition, *Florida Cattle Ranching: Five Centuries of Tradition*, the archives of the *Florida Cattleman and Livestock Journal* were one of my most valuable resources. The magazines contain a wealth of technical and historical content including articles, photographs, graphic images and advertisements, the combination of which is a treasure trove of information on the beef cattle and dairy industries of Florida. Much of this information is not available from any other source.

Since retiring from working full-time in 2010, I have worked part-time with the Florida Cattlemen’s Foundation to assist in finding a permanent home for the exhibit and writing monthly historical-cultural articles for the *Florida Cattleman and Livestock Journal*. The Foundation is a 501c-3 non-profit corporation with a four point mission of supporting research, education, leadership development, and the preservation of history and culture. Florida cattlemen recognize the value of their history and culture and have made a serious commitment to document, preserve and share it.

I also make presentations on the exhibit theme to the general public and to educators, both largely funded by the Florida Humanities Council. The audiences often ask for additional resources and how to access them. Enhanced metadata for the digital version of the magazine would make this valuable resource easily and efficiently accessible to the general public, researchers and educators.
The proposed project would be an excellent complement to the existing initiative to create a digitized version of the *Florida Cattleman and Livestock Journal*. As one who frequently researches the history of Florida’s beef cattle industry and its culture and socio-economic impact, I can assure you that anyone researching in this area would welcome an appropriate amount of metadata. Without meaningful metadata, research is much more difficult. The metadata is a key element of meaningful, user-friendly access.

I strongly recommend funding of the proposed enhanced metadata project. Completion of the project will have lasting value to a broad base of users.

Sincerely,

[Signature]

Robert Stone
Florida Cattlemen's Foundation
PO Box 421929
Kissimmee, Florida 34742-1929
(407) 846-6221

February 10, 2017

Attention:
Suzanne Stapleton
Agricultural Sciences & Digital Initiatives Librarian
Marston Science Library
University of Florida
Gainesville, Florida 32611

Subject: Grant Application Support

On behalf of the Florida Cattlemen's Foundation Board of Directors, please accept this letter of support for your application titled, Preserving Florida's Agricultural History: Digitization of The Florida Cattlemen's & Livestock Journal.

This project is of extreme importance to our organization as it will help tremendously with our charter to promote and preserve our heritage, educate this and future generations about our industry, develop knowledgeable future leaders, and document and make easily accessible the research that sustains us. Agricultural science has allowed our industry to efficiently adapt to meet our growing global needs for protein provided by our red meat, much of which has been communicated and documented in our Journal.

Upon the successful completion of this project; educators, our industry, the general populace, as well as students and researchers will have an invaluable resource covering the gambit of details about our industry.

We look forward to participating in this project, not only providing the material to be digitized but also helping in formulating the search tools that will make it easy for the user to quickly find and correlate the particular information being sought.

We are looking with anticipation at a successful grant and the completion of this valuable work.

Sincerely,

Thomas J. Harper
Chairman Florida Cattlemen's Foundation
Strategic Opportunities Program Grant Committee Questions & Responses

Question 1. Is the online exhibit necessary for the project to be considered complete? How will Lourdes Santamaria-Wheeler contribute her expertise and coordination of the online exhibit activity? When will the exhibit be created and displayed? Who will be responsible for creating the exhibit?

Response: The term “exhibit” was mistakenly used in the proposal when promotion more accurately describes the proposed plan. The newly digitized collection will be promoted in order to cultivate interest and drive traffic to the digital collection in UFDC. Promotional materials will be created and disseminated in a variety of formats including print newsletter articles, emails and social media posts. The journal landing page in UFDC will be promoted, not individual issues, in order to avoid undue influence of this research into issue-level discovery. An exhibit of the collection will not be created as part of this Strategic Opportunity Program Grant.

Question 2. Is the journal indexed through a publisher that would benefit the project?

Response: The journal is not indexed through a publisher. Once digitized, it would be appropriate to request indexing/abstracting of this serial to aid discoverability. Indexing could occur after digitization as part of the publicity process or after the conclusion of this project when a decision is made whether to enhance metadata of all issues based on the results from this research.
Question 3. How large is the journal collection? Are there plans/funding to digitize the remainder of the collection?

Response: Digitization of the journal is funded through a Project Ceres award. Project Ceres funds are restricted to publication years prior to 1989. The journal collection runs, without interruption, from 1936 to the present. Journal subscription is provided only through membership in the Florida Cattleman’s Association (circulation approximately 5,000). At this point there are no plans to digitize issues published after 1988, although that may be of interest to the publisher in the future.

Question 4. After attending Access Innovation training, do you have any changes you would like to make to the project?

Response: After attending the Access Innovation training, the team is more aware of the importance and time required to develop the rules-based thesaurus that informs the machine-aided indexing. We will need to begin work on the thesaurus immediately in consult with colleagues in the library and subject matter specialists. In light of this, a more detailed overview of the workflow for this project’s assessment is included below.

Overview of Workflow for Project Assessment
This is a research project to test the hypothesis that digital items with enhanced issue-level metadata (7-10 subject terms) will be discovered more frequently than digital items with standard serial-level metadata (3 subject terms). Access Innovation’s machine-aided indexing will be used to develop the additional relevant metadata.

1. Randomly select 237 issues from the total of 618 issues to become the Enhanced Metadata Sample Set (EMSS).
2. Digitize all 618 issues of the serial published between inception (1936) and 1988 with priority scanning of the EMSS.

3. Apply three LCSH journal-level metadata to all 618 issues, based on the existing OCLC record for the title:
   a. Cattle - periodicals
   b. Cattle – trade- periodicals
   c. Dairying – periodicals

4. Develop a Florida Cattle and Agriculture specific rules-based thesaurus in Access Innovation’s Data Harmony software (MAI) for this collection. The thesaurus will be composed of terms from established thesauri: JSTOR and Centre for Agriculture and Bioscience International (CABI, https://www.cabi.org/cabthesaurus/). Florida specific terms will be added (e.g. prominent Florida family names, farm names, and unique cattle industry terms such as Cracker Cattle).

5. Apply the Florida Cattle and Agriculture thesaurus to the selected sample set of EMSS issues. Review the suggested subject terms.

6. Use a rubric to select and add four to seven “enhanced” subject terms to the records of the sample set of EMSS issues in the University of Florida Digital Collections (UFDC).

7. Apply the Geographic Thesaurus to the EMSS to identify and add names of Florida geographic locations into a separate metadata field.

8. Make all 618 issues in UFDC publicly available.

9. Develop and distribute promotional material to attract traffic to the newly digitized journal in UFDC.
10. Collect discoverability data on a monthly basis using Google Analytics (number of and location of page visits within the journal and search terms used).

11. Conduct statistical analysis (t-test) to compare discoverability (number of issue visits) for issues with enhanced metadata versus without enhanced metadata.

12. Summarize and share results, internally and externally.

Success of this project will rely on close working relationships with colleagues in Cataloging & Discovery Services and Digital Support Services departments. Guidance from subject experts to develop rules-based thesaurus is also key.