Metadata Working Group Activity Summary for 2009-2010
(Prepared by Steven Folsom, Chair of Metadata Working Group)

The Metadata Working Group (MWG) was formed in June 2009 with the following charge:

“Provide direction for and coordination of metadata creation and management with the goal of interoperability. Develop appropriate guidelines and documentation for shared metadata in the libraries.”

This report summarizes the completed tasks from June 2009 to present, describes current efforts, and lists possible future projects.

Completed Tasks

*Survey of Metadata Projects (Fall/Winter 2009)* MWG designed and distributed a survey to get a better sense of the current and historical efforts related to the creation of metadata for digital objects within the UMass Libraries. The survey was sent to all Department Heads and a small number of other librarians who are known to work with digital objects and metadata. The questions were deliberately open ended so as not to rule out potentially relevant collections. The initial survey was designed to gather preliminary data, and after reviewing the survey responses the MWG sent a follow up set of questions to gather more detailed information. From the survey MWG came away with a better understanding of commonalities and differences in metadata practices between UMass Libraries Digital Collections, was able to indentify strengths and vulnerabilities.

*Introduction to Metadata Workshop (October 29, 2009)* MWG provided an educational opportunity for all interested librarians and staff to gain a better understanding of the basic principles of metadata as understood within the library community. Approximately 20 librarians and staff members attended, with 3 RSVP responses regrettably unable to attend. The workshop was well received, and we were able to gather feedback on what other workshops attendees would likely attend. In summary, most attendees requested a more advanced/hands-on set of workshops. Some of the topics that were identified as being of interest have been covered in subsequent workshops (e.g. Image Cataloging and Managing Your Digital Images).

*Bibliography on Shareable Metadata* (December 2009) MWG compiled a “must read” list of articles and reports on strategies for creating shareable metadata. The resources in this bibliography describe how best to ensure that metadata being created will perform optimally in an aggregated environment. The bibliography will be made available once the MWG wiki goes public.
Current Efforts

*Metadata Guidelines for UMass Libraries* (Spring 2010 - Present) MWG is currently working on a set of local guidelines for creating shareable metadata. These guidelines are an attempt to position our disparate collections to successfully index and display in an aggregated environment. The guidelines will accomplish the following:

- Define basic metadata principles
- Collate resources (e.g. links to external cataloging tools/resources, including the MWG bibliography on shareable metadata)
- Provide content guidelines for different data elements
- Identify data elements by degrees of “requiredness” and describe what functions are enabled or sacrificed depending on levels of adoption

Future Projects

(Projects to be finalized from 2009-2010)

*Report on MWG Survey (Findings /Recommendations)* - Identify practices, perform a gap analysis between local practices and standards, and propose solutions where we found vulnerabilities.

*Metadata Guidelines for UMass Libraries* - Finalize the guidelines, solicit a formal endorsement from Digital Strategies, and work with Collection Managers on incorporating these guidelines into their practices.

(Possible New Projects)

*Discovery Service* - Inform the process for inclusion of local digital collections in a discovery service platform, ensuring the optimal indexing and display of our digital collections.

*Investigate Preservation Metadata* – Identify a core set of metadata fields related to preservation, research/recommend best practices for capturing and storing this data.

*Address the Future of Technical Services* - “Consider where the library’s technical services should be in three years, and how we get there.” (Taken from a list of suggested tasks given by the Digital Strategies Group)

An acknowledgement:

As chair, I would like to thank all of the members of the Metadata Working Group for their hard work both in and outside of our meetings. The members of the MWG include Jessica Adamick, Meghan Banach, Gary Hough, Danielle Kovacs, Kelcy Shepherd, and Steven Folsom (chair).