PCC Standing Committee on Training, Task Group on the PCC Role in Metadata Training

Report

Charge:

The SCT Task Group on the PCC Role in Metadata Training is charged to:

- Identify existing and planned descriptive metadata training opportunities (via ALCTS, OCLC, LITA, or other organizations)
- Assess the need in libraries for descriptive metadata training over the near-to-medium term (3-6 years)
- Assess the appropriateness of PCC's involvement in descriptive metadata training. The assessment should articulate how any PCC role would contribute to the Program's mission and goals. It should also weigh the kind of role PCC might play (direct provider of training, advisor to other groups involved in training, etc.)
- If deemed appropriate, recommend a strategy for the PCC to enter the field of descriptive metadata training. The strategy should include:
  - o Identification of a target audience (or audiences): front-line professionals, support staff, administrators, or others.
  - o Identification of training program subject parameters (i.e., general overviews of descriptive metadata, training in working with one or more specific descriptive metadata schema, etc.)
- Recommend a model for the provision of descriptive metadata training. The recommendation should consider existing models (SCCTP "train-the-trainer" style, ALCTS Metadata Institute, etc.) and/or propose new ones as appropriate.
- Assess and recommend the most effective means of delivering training (in-person, via the Web, teleconferences, etc.)

Background

The Task Group acknowledged immediately that there are many metadata standards available for use. Dublin Core (DC), Encoded Archival Description (EAD), and the Visual Resources Association Core (VRA Core) are but just three.

The Task Group also examined the PCC Strategic Plan, 2002-2006, incorporating Action items for 2002-2004. In this Plan, the mission statement of the PCC reads:

> In support of the need to provide access to information resources the Program will seek to cooperatively increase the timely availability of authoritative records created and maintained under accepted standards to facilitate the cost-effective creation and use of these records, and to provide leadership in the national

and international information community.

The Task Group recognizes the emphasis that the PCC places on the sharing of bibliographic, authority and holdings data. It is with the above in mind that the Task Group began its thinking and deliberations.

Metadata Training Opportunities

The Task Group examined existing and planned descriptive metadata training opportunities. Such opportunities are offered by the OCLC regional networks in various venues, by other local/regional/state groups (e.g. the Central New York Library Resources Council and the Colorado Digitization Program), and by various ALA groups. In addition, the ALCTS Networked Resources and Metadata Committee has offered programs at ALA conferences.

The ALCTS Networked Resources and Metadata Committee (NRMC) has had as one of its primary charges to conduct metadata training and education in concert with the ALCTS strategic and tactical plans. Although the NRMC is in the process of transitioning from a "committee" to an "interest group" within ALCTS, metadata education is still part of its charge. This committee has not offered as much training in the area of descriptive metadata as had been anticipated.

Individual institutions or consortia have also offered training in descriptive metadata. The Colorado Digitization Program (CDP) developed and offered training in metadata from its inception. In addition, as part of grants awarded by IMLS, the CDP conducted metadata training in Nebraska, Kansas and Wyoming. The metadata standards and training provided by the CDP were in the use of Dublin Core (a modified Dublin Core). CDP personnel also have taught Dublin Core metadata in other states and for institutions other than those mentioned above.

ALCTS is offering a preconference at the ALA Annual Conference in Orlando in 2004 with the title "Putting the Digital Puzzle Together: Creating a Digital Project." The ALCTS website lists as part of the description for this preconference that speakers will "describe the choices in metadata standards used to provide access and description to digital projects." As part of the LC Action Plan, ALCTS also has the ALCTS Metadata Enrichment Task Force.

Need for Descriptive Metadata Training

Many libraries will indeed be providing descriptive metadata for digitization projects or programs if they are not already doing so. There is now a need for training, and there will be a need for training in the future. The real issue with the need for training is to determine exactly what type of training is needed.

Digital projects take many different forms and use different types of metadata for description. The type of digital project undertaken determines the type of metadata

needed. Digital projects are not uniform in nature and do not all need or use the same descriptive metadata elements. In addition, items that are being considered for digitization or that are being digitized are in many instances unique items or objects.

PCC Involvement

The Task Group does not think that it is appropriate for the PCC to be involved in descriptive metadata training at this time. There are several reasons for this.

1. The PCC has been successful in setting guidelines for the use of AACR2 and MARC for the creation of bibliographic and authority data and for ensuring that this data can be shared; however, it must be recognized that the process of establishing "mutually agreed to standards and guidelines" was not an easy or short process. It seems that it would be a waste of time and effort for the PCC to attempt to set guidelines for the use of any metadata schema. Each schema has its own "group" overseeing its implementation and use. If one uses the Dublin Core as just one example, there are dozens of "varieties" of Dublin Core. Implementers of DC for digital object description have added, deleted and modified the original 15 DC elements for specific project use. For DC, it seems best to let the DCMI be responsible for providing guidelines and not to engage the PCC in attempting to set guidelines and best practices.
2. While MARC and AACR2 certainly do change and evolve, the evolution of these standards is fairly predictable and is controlled by librarians and the library community. Non-MARC metadata schema and standards are for the most part not controlled by librarians. The constant flux found in non-MARC metadata makes it difficult to provide training and to keep up with the changes. The Task Group feels that training needed for non-MARC metadata schema is qualitatively different than the training currently provided by the PCC and that it would be impossible for the PCC to develop any kind of reasonable training program for any of the metadata schema. The PCC is currently not prepared to respond to swift changes especially regarding training materials.
3. One of the goals of the PCC is to share bibliographic and authority data. As many of the digital items requiring descriptive metadata are unique, there would be less sharing of descriptive metadata that could occur.
4. Trainers would be required for any training effort. Given the multiple schema in use, it would be difficult to find skilled trainers. There are also multiple systems in use for the creation and provision of metadata with no common standard such as MARC in library systems.
5. The PCC may have tangential involvement in the recommendations made in "Cataloging for the 21st Century: A Proposal for Continuing Education for Cataloging Professionals", a response to Action Item 5.3 of the "Bibliographic Control of Web Resources: A Library of Congress Action Plan". This report was submitted to the ALCTS Advisory Task Force on the LC Action Plan for Bibliographic Control of Web Resources. In the recommendations of the ALCTS Continuing Education Task Force's report, there are several courses that are detailed, in particular Courses 2, 4 and 5 all have metadata training as

components. The PCC needs to keep abreast of the development of training materials for the courses mentioned in the report and should consider what its role might be in the development of the course content.

The Task Group recommends that

1. The PCC consider conducting a survey of its members to see if there is any non-MARC metadata standard(s) commonly in use for which the PCC could facilitate and/or develop training.
2. The PCC appoint a task group that reports to the PCC Standing Committee on Training to conduct this survey.

The Appendix that follows provides a set of possible survey questions that might be sent to PCC members.

Respectfully submitted,

Bill Garrison, Chair
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Appendix

Sample Survey Questions

Survey on Metadata Training Needs in PCC Member Libraries

1. Is your library currently using any non-MARC metadata?
     Yes _____   No _____

1a. If yes, please list the metadata scheme or schema that are in use at your institution:

2. Does your institution have a digital content management system?
     Yes _____   No _____

2a. If yes, please provide the name/provider of the system:

2b. If no, does your institution plan to purchase a digital content management system?
     Yes _____   No _____

3. If your institution currently does not use any non-MARC metadata, are any projects planned that will need to use non-MARC metadata?
     Yes _____   No _____

3a. If yes, for what types of objects will metadata need to be created? Please list:

3b. If yes, what metadata scheme/schema are under consideration? Please list:

4. If your institution has a digital content management system, how is metadata input or created? (e.g., XML editor, digital content management system interface) Please list:

5. Are there any metadata schema in which your institution would like training? Please list specific scheme or schema:

6. Does your institution think that it would be appropriate for the PCC to develop and offer training in the scheme or schema listed in question 5?
     Yes _____   Please explain why:

     No _____   Please explain why not: