

# **Public Broadcasting Metadata Dictionary Project**

## **Phase Two Narrative Report (2 of 2)**

### **Submitted by WGBH Educational Foundation, January 16, 2003**

Topics in this report that relate to specific Phase 2 deliverables are indicated with an asterisk (\*).

This report outlines activities conducted on behalf of the project during the period October 1 to November 22, 2002. Previous Phase Two activities for the period of June 1 to September 30 are referenced in a separate Phase 2 project narrative.\*

It should be noted that WGBH and the Dictionary Team continued to work during the period of November 23 through January 5 – the duration between the official end of the project's Phase 2 and beginning of Phase 3. During this time WGBH continued to work with CPB to the extent possible in maintaining project momentum and preparing for the project's final phase.

During Phase 2, the Working Group's activities continued to be completed under the aegis of two committees: the Dictionary Review team and the User Requirements team. Each group achieved consensus to develop the tools, processes and timelines by which to carry out their work.

## **Activities to Facilitate Communications for the Project**

### ***Presentations***

With the exception of the ASIST conference listed below, WGBH coordinated with CPB and the presenting organizations of the following conferences, to arrange for presentations to be made on behalf of the project.

### **PBS Traffic and Operations Conference – October 2002**

On October 4, 2002, CPB project officer Alison White moderated a general session at the **PBS Operations and Engineering Conference**, entitled "Who Cares About Metadata?"\* This presentation followed a session featuring project advisor Grace Agnew, entitled "Metadata Explained." The audience consisted of roughly 250 traffic and broadcast operations personnel from stations; the presentation was designed to explain what happens to program data today, and how that data might be automatically transformed and reused in the systems of tomorrow. The speakers included John Andersen, of Accenture (part of the PBS Orion project), David Felland of WMVS, Dave MacCarn of WGBH and Meg O'Hara of WNET. The session stressed the importance of adapting a single metadata standard for public broadcasting, in order to minimize costly and cumbersome data translations between programming, development, broadcast ops, Internet and others software systems. Because they are at the center of many key station functions, this audience is an important one for project uptake. However, they are a very "nuts and bolts" group, highly grounded in challenges of today. Rather than transforming or inciting this particular group, the presentation merely "softened" this audience for concepts they'll be presented with in the future.

## **Iowa DTV Symposium – November 2002**

On November 6, the project was presented at the **Iowa DTV Symposium**, in a general Content Track session entitled "DAM Evangelists: The Gospel of Digital Asset Management."\* Speakers were project advisor Grace Agnew of the Association of Moving Image Archivists (AMIA) and Rutgers University, project officer Alison White of CPB and Dave MacCarn, Asset Management Architect for WGBH.

The audience at the DTV Symposium is varied, with representation from a number television disciplines, and populated by individuals who are forward-looking in nature. The presentation included information about the Metadata Dictionary project, presented by White. Agnew described her work with AMIA in creating a portal/virtual library called the Moving Image Gateway (a precursor for public interest repositories) and MacCarn actually demonstrated WGBH's digital asset management system.

Overall, it appeared to be a highly appreciated session. Presenting these ideas and activities together seems to enhance uptake.

## **ASIST 2002 Conference – November 2002**

At the 2002 annual conference of the American Society for Information Science and Technology in Philadelphia, Pennsylvania, Paul Burrows/KUED Media Solutions, Efthimis Efthimiadis/University of Washington, and Alison White/CPB presented\* background information about Public Broadcasting's interests in Media Asset Retrieval Systems and updates on the MARS Project, as well as the latest news from the Public Broadcasting Metadata Dictionary Workgroup's activities.

The attendees numbered about 30 and were drawn mostly from information specialists associated with libraries and academic institutions, although a handful came from the state and federal level. Presenting at the ASIST conference was a unique opportunity to share the asset management and metadata needs of Public Broadcasting communities with those of the academic and credentialed library and information science communities. Consensus was that we all shared common concerns and needs regarding asset management and retrieval systems and quality metadata schemes. At the conclusion of the session, about a half-dozen attendees offered their interest in participating in any RFC or beta testing of the PBCore Metadata as that phase of the project approached.

## **NETA (National Educational Telecommunications Association) Conference – January 2003**

WGBH began initial planning for the project's presentation at the 2003 NETA conference, in coordination with Paul Burrows/KUED Media Solutions, Tracy Vosburgh, Charlie Gudeman/Penn State Public Broadcasting, and CPB.

## **PBS Programmers Meeting – February 2003**

WGBH coordinated with PBS in hopes of securing a concurrent session slot to present the project to the public broadcasting programming community. Although PBS

declined, they did agree to waive the fees for inclusion of a project one-sheet in the conference attendees' totebags. WGBH will work with CPB to develop the materials by PBS's January 31, 2003 deadline.

### **PBS Technology Conference – April 2003**

PBS's deadline for initial proposals for presentations at the 2003 PBS Technology conference fell during the afore-mentioned period between Phase 2 and 3; however, WGBH worked with CPB in order to meet PBS' deadline. WGBH will continue work early in Phase 3 to complete the presentation, and will endeavor to align it with a separate presentation regarding WGBH's DAM initiative.

### ***Communications with Interested Parties***

#### **Bix Doughty, Georgia Public Television**

Prompted by Mike Nixon/GPTV, Bix Doughty had the impression the Dictionary was already available for review and requested a copy. Marcia Brooks conveyed the project's anticipated timeline for the RFC, testing and publishing milestones. In discussion with CPB, it was decided to expedite GPTV's access to the Dictionary by including them in the first RFC round, which is otherwise intended to be mostly for the Working Group's review prior to releasing it to the wider public broadcasting system and beyond.

#### **Jim Metzner – Radio Producer**

During the interim between phases 2 and 3, Jim was referred to WGBH for a project update by Jeff Ramirez/CPB. Jim, a radio producer and archivist of recorded natural world and environment sounds, had learned of the project and was concerned that the project wasn't representing people like him. Jim's particularly interested in ensuring that the Dictionary accommodate the short format segment recordings that he contributes to nationally distributed public radio programs, and which comprise his archives. Along with project timelines and milestones conveyed, Jim was assured that the Dictionary Team is deliberating in detail how to accommodate metadata at the program and element level.

#### **Charles Cole/ThinkTV (WPTD)**

While discussing available DAM resources with WPTD, Marcia Brooks summarized the metadata project's activities and status; Charles Cole offered the services of the PBS Traffic Advisory Committee, to participate in the RFC process.

### **Working Group Committee Members and Committee Tasks/Assignments**

#### **Dictionary Review Team**

Alan Baker/Minnesota Public Radio, Marty Bloss/National Public Radio, Paul E. Burrows/KUED Media Solutions, Dave MacCarn/WGBH Educational Foundation, Marilyn Pierce, Cate Twohill/Public Broadcasting Service. Team advisor: Efthimis Efthimiadis/University of Washington. Additional support provided by: Scott Bridgewater/NPR, Carrie Lowe/Public Broadcasting Service, and Thom Shepard/WGBH Educational Foundation. Team facilitator: Marcia Brooks.

The Dictionary Review Team continued its work in this last portion of Phase 2, focusing on continuing to collapse the number of fields in the Dictionary, and to provide examples for them. Following the October Dictionary Team Meeting (see below), additional thoughts were shared for Phase 3's anticipated Request for Comments (RFC) rounds. It was suggested that the RFC be conducted in two rounds, with the first round consist of the entire Working Group. The Dictionary Team proposes to re-convene in January to reconcile the feedback to prepare for the second RFC round.

As previously noted, the Dictionary Team continued to work during the period of November 23 through January 5 – the duration between the official end of the project's Phase 2 and beginning of Phase 3. During this time, Cate Twohill/PBS spearheaded the development of an abridged version of the Dictionary (referred to as the "Readers Digest"), meant to facilitate the Dictionary's review by parties not thoroughly versed in metadata matters.

### **User Requirements Team**

Bea Morse/PBS, Robin Mudge (replaced in January 2003 by Michael Connet)/onCourse, Tim Olson/KCTS, Marilyn Pierce/PBS, Richard Ruotolo (replaced in September 2002 by Brent Trinacty)/Public Radio International, James Steinbach/WHA, Steven Vedro/Consultant, Tracy Vosburgh/WPSX. Team advisors: Grace Agnew/AMIA and Judy Brown/Academic CoLab (SCORM). Team facilitator: Marcia Brooks.

Led by Brent Trinacty/PRI, the User Requirements team completed its User Requirements Matrix\*, a document connecting proposed Dictionary fields with anticipated user needs. The matrix was distributed via the project listserv for review and feedback. General consensus is that the matrix represents the user requirements gathered during the use case interview process, and that the Dictionary meets the matrix's stated requirements.

### **Adjunct Working Group Members**

Other than David Felland/Milwaukee Public Television and Meg O'Hara/WNET's participation in the project's panel presentation\* at the PBS Traffic and Operations conference, the Working Group adjunct members were not assigned specific tasks for this portion of Phase 2.

### **Committee and Adjunct Meeting Dates, Participants, Agenda and Outcomes**

#### **Dictionary Review Team Meeting – aka "The Beantown Smackdown"**

Members of the Dictionary Review Team as listed above, joined by Thom Shepard/WGBH, and for one day, Carrie Lowe/PBS, participated in the Dictionary Review Team meeting held at WGBH October 16-18, 2002. The agenda\* essentially consisted of providing the team with ample time to complete the sole function of the meeting: to continue to refine the Dictionary.

The meeting participants\* were consistently and cheerfully committed throughout the meeting, in spite of the intensive nature of the work at hand. Participants agreed that meeting face-to-face was much more productive than telephone conference calls, in order to develop the Dictionary ("PBCore"\*). The meeting resulted in reducing the number of Dictionary fields from 249 to 59, an accomplishment for which the team takes pride. In order to maintain momentum for the meeting, fields for which consensus could not be reached were set aside and then reviewed at the latter part of the meeting. It was agreed that the remaining fields would be flagged for particular comment in the RFC rounds, and initial thoughts were shared about the RFC process.

The meeting participants were given a demonstration of WGBH's DAM reference architecture, and were updated on related efforts for the WGBH DAM initiative.

## **Publication of the Group's Preliminary Recommendation for a Metadata Dictionary**

No formal announcements for the first publication of the Dictionary have been made, although interested parties to date have been advised of the anticipated timeline for RFC and testing rounds, and for publication.

In addition, Dictionary team member Marty Bloss/NPR sought and received permission from CPB, WGBH and the Dictionary Team to capitalize on an opportunity to share the Dictionary with the Public Radio Exchange, which is working with NPR's Content Depot on a potential project that would embody the PB Core.

## **Recommendations for Phase Three Activities**

Pending further resolution from CPB regarding the disposition of Future Fund review and its impact on the development of Phase 3, WGBH and CPB worked to define the following suggested activities and timeline.

### ***December 9 – December 20***

1. DRT ConCall.
2. DRT develops review questions and documentation for PBMWG, et al (obtain results).

### ***December 21 – January 31***

1. Conduct Review of Preliminary Version.1 by full PBMWG:  
NPR Archive  
NPR Content Depot  
NPR Online

PBS Orion  
PBS Archive  
PBS Tech Ctr. Asset Management  
PBS.org  
APTVS  
PRI  
NETA  
Public Interactive  
Rutgers/AMIA (Agnew)  
ADL Co-Lab/SCORM (Brown)  
University of Washington Information School  
onCourse (Michael Connet)  
Minnesota Public Radio  
KUED  
WGBH  
WNET  
NET  
KCTS  
WPT  
WPSX  
KWSU  
WHRO  
David Grubin, Inc.  
Sharon Blair, AMIA  
Extra: Mike Nixon, GPTV  
Extra: Public Radio Exchange

2. NETA Presentation on AM/Metadata (with Penn State)
3. Committee: Develop RFC questions & design RFC process.

Note that the RFC participants list above is to be reconciled with suggestions received from the Dictionary Review team.

### ***February 1 – March 15***

1. DRT in-person mtg. to update Preliminary Version.1 to .2
2. Committee: Prepare for Test Implementation Phase.
3. Committee: Controlled Vocabularies/Authority Files work.
4. Committee: Develop Communications/Compliance plan.

### ***March 16 – April 30***

1. Conduct Request for Comments (RFC) Process on Preliminary Version.2 (note that the following list will be combined with/reconciled against Working Group members' suggestions):

Charles Vaughn, KLRN  
Gerry Field, WGBH  
Vickie Nauman, KEXP (vnauman@kexp.org)  
KET "Back to the Future" Project  
Chalkwaves (KCPT and Amy Shaw, WSIU)  
Internet 2 VIDE

David Preston, TPT  
Clifford Lynch, CNI ([cliff@cni.org](mailto:cliff@cni.org))  
Sesame Workshop  
ITVS?  
Christie Timms, MPT Thinkport ([ctimms@mpt.org](mailto:ctimms@mpt.org))  
AMIA  
Station Resource Group  
Educause  
Radio Exchange  
WUNC Radio Exchange  
SCETV International News Lab

National Geographic  
CNN  
Library of Congress  
Smokey Forester, American Museum of Natural History ([smokey@smokey.com](mailto:smokey@smokey.com))

Skip Pizzi, Manager TV Standards and Regulatory Affairs, Microsoft  
([skippiz@microsoft.com](mailto:skippiz@microsoft.com))  
Artesia  
Darwin Kuan, VP Business Development, Pictron ([Darwin@pictron.com](mailto:Darwin@pictron.com))  
DSMCi (MAS project – Duane Shugar, CEO ([duane.shugars@dsmci.com](mailto:duane.shugars@dsmci.com))  
IBM (Fred Bonner)  
Jerry Ledbetter, Executive Vice President, Concadia Solutions, LLC  
([Jerry.Ledbetter@concadia.com](mailto:Jerry.Ledbetter@concadia.com))  
Anna Mae Sokusky, Dalet Digital Media Systems ([asokusky@dalet.com](mailto:asokusky@dalet.com))  
Brian Campanotti, Masstech Group ([brian.campanotti@masstechgroup.com](mailto:brian.campanotti@masstechgroup.com))  
Jay Adrick, Harris Corporation  
Meyers  
Scout  
Allegiance  
Team Approach/David Murray, PBS  
Target Analysis?

2. Committee: Develop Test Implementation/Application Profile Tools or Plan (including metadata mapping tool and development of temporary repository).
3. Committee: Controlled Vocabularies/Authority Files work.

### ***May 1 – June 15***

1. Test Implementation/Application Profile:
  - WGBH
  - KUED
  - PBS Orion (Now with Bill Moyers to Scout/Meyers and radio)
  - NPR Archive
  - MPR MAS
  - onCourse
  - Others TBD
2. PBS Tech Conference presentation.
3. Committee: Controlled Vocabularies/Authority Files work.

### ***June 16 – July 15***

1. DRT: Update Dictionary based on Test Results.
2. Whole group mtg. Re: future issues, and to “ratify” PBMD Version.1.

### ***July 16 – July 31***

1. Publish PBMD V.1.

## **WGBH Estimated Budget for Phase Three Activities**

\*To be submitted under separate cover. It should be noted that detailed planning for the majority of the proposed Phase Three activities above, and identification of their associated costs, cannot be fully anticipated or detailed until completion of the review of the Future Fund, in progress at this writing. Further costs associated with testing the Dictionary may become apparent, although it is not considered feasible to be estimated in the Phase 3 budget submitted. WGBH hopes to be able to address these project needs and expenses with CPB in ongoing planning discussions for Phase 3.