

Metadata Dictionary for Public Broadcasting Phase 3 Final Project Narrative

This report outlines the final Phase 3 objectives, activities, participants, status of associated deliverables, and timelines conducted on behalf of the project during the period of July 1 to July 31, 2003. Previous Phase 3 activities and outcomes for the period of January 6 through June 30, 2003 were documented in a separate, interim project narrative submitted by WGBH on August 1, 2003.

Phase Three Conclusion Overview

In the latter portion of Phase 3, the work of the task teams continued via regularly scheduled conference calls and e-mails, to address: Intellectual Property and Communications; Problem/Value Statement; Sustainability, Dictionary Development; Request for Comments (RFC) and Test Implementation; and Integration and Compliance. (See "Working Group Task Teams Status" below.)

Marcia Brooks/WGBH actively directed and participated in each team's proceedings, in consistent coordination with Alison White/CPB, who joined a number of the team's conference calls. Although many participants continued to invest a good deal of their time, others needed to limit their participation. In those instances, Marcia worked beyond the team framework on a one-to-one basis to maximize the yield of input. As such, the role of team leader was not consistently fulfilled, and therefore, a Steering Committee was not formed. Marcia Brooks/WGBH actively assumed responsibility for cross-team coordination, and arranged for several teams to participate in other teams' key calls.

Throughout this process, WGBH maintained communications with working group members and interested parties as listed below.

Internal Project Communications Planning and Activities

Project Web Site and Listserv

WGBH continued its ongoing direction of KUED's provision of Web services and hosting for the project Web site <<http://www.utah.edu/cpbmetadata/>> and the project listserv which specifically entailed posting updated project documents to the private (working group/advisors only) section of the Web site.

Task Team Conference Calls

WGBH established 11 regularly scheduled conference calls for the various task teams, and continued to support the activities of each by: serving as meeting facilitator; establishing call agendas; documenting and distributing meeting notes/action items; ensuring cross-team updates and coordination; following up with individual team members; and coordinating the above with CPB. WGBH additionally assumed responsibility to participate in specific task team activities and deliverables, and to follow-up with individual team members to maximize their input. Reports on the specific activities and recommendations of each team are included in this report.

Additional Project Coordination

Marcia Brooks/WGBH met with Jamie Haines, Director of National Promotions, to solicit input on Team A's draft marketing plan, including recommended associated costs. The subject of

potential marketing sub-contractors, including WGBH, was separately addressed. (See "Task Team A" status below.)

Marcia Brooks/WGBH coordinated with Richard Ruotolo/PRI, to plan for his prospective new hire to replace him on the Working Group.

External Project Communications Planning and Activities

Project Web Site

WGBH coordinated with Paul Burrows of KUED Media Solutions to provide project documents and updates to the public section of the project Web site, and to begin planning the development of the PBCore presentation site and online user guide.

Interested Parties

Jonathan Downey, NPR

Marcia Brooks/WGBH and Jonathan Downey, Director of Digital Media for NPR Online, continued to coordinate regarding general project conversations about the use of XML in expressing the PBCore (also referred to as the Dictionary). Earlier in Phase 3, it was acknowledged that Jonathan's technical expertise and knowledge of XML could serve as a resource to help inform the Dictionary Team's work.

Abbe Weisenthal, Turner Broadcasting

Abbe Weisenthal, Sr. Director, Quality and Standards for Turner Broadcasting, was referred by a colleague to the project Web site, which she reviewed with great interest. Abbe contacted Alison White/CPB regarding Turner's spearheading of a corporate-wide effort to establish video metadata standards and preliminary XML name definitions for the exchange of data between Turner, HBO, Warner Bros., CNN and AOL. Turner also solicited input regarding standards from Cable Labs. Abbe shared their preliminary Proposed Metadata Dictionary for Sharing Video Assets, and offered to participate in the upcoming RFC (Request for Comments) rounds.

Marcia Brooks/WGBH forwarded the above information to the Dictionary Development Team and ad hoc participants from WGBH and NPR. Initial observations revealed the validated sense that the PBCore is advanced in structure and scope. Discussion of Turner's role as a potential test site participant is anticipated to continue in Phase 4.

PBS/TiVo

Informed by ongoing discussions with the Dictionary Team and Alison White/CPB, Marcia Brooks/WGBH sent an e-mail to Deron Triff and others at PBS to suggest a title for PBS's impending guidelines for producers to follow in their submission of information to Orion, in order to avoid confusion in the public television system between PBS's efforts and the Public Broadcasting Metadata Initiative.

Project Presentations and Papers

Evolving the Links

Marcia Brooks/WGBH, Alison White/CPB, and Paul Burrows/KUED Media Solutions, were invited to participate in a panel at the final Evolving the Links conference in September 2003. Marcia Brooks began initial coordination with Steven Vedro/Consultant to Wisconsin Public Television to plan how best to represent the project.

Dublin Core Paper

Lending distinction and credence to the project, the paper authored by the Dictionary Development Team (led by advisor Efthimis Efthimiadis/University of Washington and with contributions from Thom Shepard/WGBH), was accepted for presentation at the Dublin Core conference in September 2003. Marcia Brooks/WGBH coordinated with the authors as above to address the reviewers' suggested edits to the paper in the final paper submission.

IMS alt-i-lab

WGBH was slated to represent its digital asset management efforts at the July 2003 IMS alt-i-lab conference, organized by the IMS Global Learning Consortium and the MIT-led Open Knowledge Initiative, and Amy Rantanen/WGBH invited Alison White/CPB to participate. Marcia Brooks/WGBH coordinated with IMS, which was pleased to include updates about the Public Broadcasting Metadata Initiative, and although Alison ultimately was unable to participate, Dave MacCarn/WGBH (a member of the Dictionary Team) included a project description in his remarks at a roundtable for digital repositories. Dave additionally spoke with an attendee from Florida State University, whom Dave recommended for inclusion in the upcoming RFC (Request for Comments) rounds.

Working Group Task Teams Status

As Phase 3 came to conclusion, it became apparent that the level of sustainable work by participants would continue to need more realistic assessment in the planning of Phase 4.

Each task team's specific deliverables are submitted under separate cover. The remainder of each team's Phase 3 activities is summarized below.

Task Team A – Intellectual Property and Communications

Assigned Team Members

Alison White/CPB (Team Leader), Marcia Brooks/WGBH, Dennis Haarsager/KWSU.

Objectives

1. Develop a clearer understanding of intellectual property issues as they relate to the PBCore
2. Develop a marketing plan for the project
3. Strengthen internal project communication

Status/Activities Conducted

The task team members convened for regularly scheduled conference calls on July 2, 11 and 24.

Per Objective #1:

- Alison White/CPB held discussions with other CPB staff regarding copyright issues, and the team continued to discuss those related issues represented in the draft Intellectual Property Issues and Recommendations document, (to be submitted under separate cover).

Per Objective #2:

- Alison White/CPB sent the draft Marketing Outline to the team.
- For inclusion in the draft Marketing Plan (to be submitted under separate cover), Marcia Brooks/WGBH drafted a list of the communication activities (presentations, networking opportunities, and distributed handouts) conducted on behalf of the project to-date.
- Marcia Brooks/WGBH vetted the draft Marketing Plan with WGBH National Promotions and Budget offices, and met with Jamie Haines, Dir. Of National Promotions to investigate what WGBH could bring to the role of marketing sub-contractor. Marcia solicited information about other prospective sub-contractors, and after consideration, recommended to the team that WGBH would bring the most value to the role.

Per Objective #3:

- The team continued discussion of its recommendation that a letter from Bob Coonrod/CPB be sent to the superiors of the project participants, regarding the importance of their staffs' efforts and of their organizations' continued buy-in.
- Alison White/CPB continued discussion with other staff at CPB regarding the team's recommendation.
- To ensure PBS's ongoing commitment to the project, and to ascertain the extent to which EIOP's Broadview is capable of incorporating elements from the PBCore, the team proposed that Dennis Haarsager/KWSU's to speak with Ed Caleca/PBS.

Task Team B – Problem/Value Statement

Assigned Team Members

James Steinbach/Wisconsin Public Television (Team Leader), and Tim Olson/KQED.

Objective

Create a more developed "problem/value statement" for the project.

Status/Activities Conducted

Although team members checked in with the Marcia Brooks/WGBH, the draft problem/value statement was not finalized, pending further review from Alison White/CPB.

Task Team C – Sustainability

Assigned Team Members

Judy Brown/SCORM, Rob Holt/NPR Online, Dave Johnston/PBS Online, Ann Lootens/WGBH, Chuck McConnell, NETA/OSBE (Team Leader), Art Zygielbaum/Nebraska Educational Television, and Thom Shepard/WGBH (Advisor).

Objective

Develop a plan for "sustainability" for the PBCore, to include: expected lifespan; the most useful form the PBCore would need to be expressed and held; the required activities to maintain the PBCore and their associated cost and personnel requirements; and the required level of commitment to sustainability.

Status/Activities Conducted to Date

The participants of Team C were challenged not only by the difficult nature of the subject matter, but were not able come up with mutually agreeable conference call days and times, and did not ultimately form together as a team. Marcia Brooks/WGBH solicited input from individuals on the group, most of whom gave well-considered responses to inform the development of the Sustainability Plan that will be submitted under separate cover.

Task Team D – Dictionary (PBCore) Development

Assigned Team Members

Alan Baker/MPR, Marty Bloss/NPR-PRSS, Paul Burrows/KUED Media Solutions (Team Leader), Efthimis Efthimiadis/University of Washington (Advisor), Dave MacCarn/WGBH, Cate Twohill/PBS. Additional support provided by Scott Bridgewater/NPR-PRSS, and Thom Shepard/WGBH.

Objectives

Continue development of the Public Broadcasting Metadata Dictionary ("PBCore"), including:

- Ascertain whether controlled vocabularies and/or authority files are required for the PBCore, or recommended.
- Develop controlled vocabularies/authority files as needed
- Determine whether parts of the Preliminary PBCore can be finalized now, and released to projects that request it.
- Continue development of MD presentation/maintenance format: e.g., AP in Filemaker, Excel, HTML, etc.
- Plan User's Guide (see <http://dublincore.org/documents/usageguide/>).

Status/Activities Conducted

The task team members convened for regularly scheduled conference calls on July 3, 9 and 23.

The focus of the Team's work was to continue to resolve as many ambiguities in the PBCore as possible, in order to prepare the PBCore for the first public presentation (the RFC process). Thanks to Paul Burrows'/KUED Media Solutions' efforts, each member of the Dictionary Team was able to provide individual input using online tools, which also served to aggregate the responses. With an eye towards ensuring that the PBCore can serve the interests of end-to-end content distribution, efforts to refine the PBCore included separating Tribune Media Services program categories to develop controlled vocabularies for "form" and "genre".

Team members contributed additional efforts to:

- Respond to Dublin Core reviewer's edit suggestions to finalize the paper for the September 2003 Dublin Core conference
- Coordinate and advise regarding the potential intersection of the project with the development of PBS' program descriptor guidelines for electronic and cable program guides (see "Interested Parties" above).

- Coordinate with Team E (RFC and Test Implementation) to continue to develop/ensure alignment with the emerging draft RFC and Test Implementation Plans, and to give specific feedback to the draft RFC question sets (including soliciting input from experts on the remaining unresolved items). Several team members began initial exploration of the possibility of developing and hosting the Web-based RFC survey tool.

Task Team E – RFC and Testing

Assigned Team Members

Nancy Baldacci/American Public Television, David Felland/Milwaukee Public Television, Steven Heard/Public Interactive (Team Leader), Bea Morse/PBS, Steven Vedro/Consultant, Wisconsin Public Television.

Objectives

- Plan the Request for Comments process, including participants, questions to be asked, method for compiling, analyzing and reporting findings and recommendations, estimated timeline and budget.
- Plan Test Implementations phase: criteria and selection process for participants, hypotheses to be tested, budget, etc.

Status/Activities Conducted to Date

The team conducted regularly scheduled conference calls on July 1, 8 and 22.

Discussions amongst the team, and in coordination with the Dictionary Development Team ("D"), generated suggestions to further develop the RFC and Test Implementation plans (to be submitted under separate cover). As part of the cross-team coordination, Team E provided feedback to the Dictionary Development team as to how the PBCore should be presented in the RFC process.

Steven Vedro/Consultant, Wisconsin Public Television further developed the RFC question sets, and was designated the point person to coordinate with the Dictionary Development team. Steven Heard/Public Interactive maintained an up-to-date list of ongoing suggestions for participants in the RFC process. Marcia Brooks/WGBH tracked the suggestions for test implementation sites.

Task Team F – Integration and Compliance

Assigned Team Members:

Meg O'Hara/WNET <unable to participate>, Marilyn Pierce/PBS, Amy Rantanen/WGBH, Mike Tondreau/Oregon Public Broadcasting, Tracy Vosburgh/WPSX-Penn State. Note: Michael Connet/onCourse (Team Leader), is no longer with onCourse, and therefore, no longer with the project/team.

Objective

Develop a "map" or model that describes how this work and this instrument are related to public broadcasting's broad and long-term data exchange, storage and integrity needs.

Status/Activities Conducted to Date

The task team members convened for regularly scheduled conference calls on July 14 and 21.

The focus for team participants in the latter part of Phase 3 was to conduct interviews with parties designated as being able to provide key insights from various perspectives (station, vendor, educational, public broadcasting national organizations, university libraries/museums). Although not all participants were able to complete their assigned interviews, the findings that were gathered will be represented in the Compliance and System Integration Plan (to be submitted under separate cover).