

Metadata Dictionary for Public Broadcasting Phase 3, Request for Comments (RFC) Plan & Timeline from Task Team E

Team E Members

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Plan Overview

This plan defines the estimated process and timeline required to conduct Request for Comments rounds for the PB Core (formerly known as PBMD). It details participants, methodology, communications, analyzing and reporting findings and recommendations, proposed timeline, and estimated budget known at the report's initial writing in Phase 3.

Note that the Requests for Comments rounds to be conducted in Phase 4 will be informed by the recommendations in this plan; however, the final execution will be proposed and led by a sub-contractor, working in close collaboration with Marcia Brooks/WGBH and Alison White/CPB. (Note: see Personnel/Vendors below.)

RFC Participants

The first RFC round will include the entire Public Broadcasting Metadata Working Group.

The second RFC round will invite feedback from roughly sixty individuals suggested by Working Group members and project participants. The list (to be submitted under separate cover) represents public radio and television stations, related public broadcasting organizations, independent producers, libraries, standards bodies, cultural organizations, government agencies, and vendors.

RFC Process

Personnel/Vendors

A sub-contractor will be engaged to work with Marcia Brooks/WGBH and Alison White/CPB, (in consultation with working group members) in managing the survey implementation, analysis and reporting. A Web-survey vendor will be engaged to provide services as determined by the sub-contractor/CPB/WGBH, which may include hosting, refinement of survey questions, and tabulation. Under current consideration are survey tools in place at existing project members' organizations:

- Catalyst - University of Washington (Contact: Efthimis Efthimiadis, advisor to the dictionary development team)
- WebSurveyor – University of Utah (Contact: Paul Burrows, team leader, dictionary development team)
- To-be-named tool at MPR (Contact: Alan Baker, member of dictionary development team)

The preferred provider(s) will be selected in Phase 4.

Survey

Participants will be asked to complete a Web-based survey, with their individual responses to be kept confidential. The survey will be comprised of two question sets: the first for all participants to complete; the second for users/implementers of the PB Core, and metadata/standards experts.

In consultation with project participants, the RFC sub-contractor will be responsible for the final survey and the management of the process. However, the Dictionary Team will provide specific questions for the "expert" question set, in order to solicit element-specific feedback, especially regarding controlled vocabularies – the survey will be designed to narrow down controlled vocabularies to several choices, with the goal to narrow down to a single choice where possible. Expert respondents will be asked to check each element they anticipate using.

For both question sets, the questions will be formatted on a 1-5 scale to yield quantitative results, with each question offering an additional field for free-form elaboration. Respondents will be presented with the PB Core in HTML form via a Web link.

Prior to the survey's official release, an initial pilot test with a small sample of respondents is planned, in order to work out any problems/ambiguities with the survey and/or the process.

The two draft question sets follow.

Question Set #1 (For All Participants)

1. ID: What type of organization do you represent?

- 1.1. Public television station (broadcast ops and local production)
- 1.2. Public radio station (broadcast ops and local production)
- 1.3. Public television national producer (station or independent)
- 1.4. Public radio national producer (station or independent)
- 1.5. Public television national distributor
- 1.6. Public radio national distributor
- 1.7. Public television content consortium
- 1.8. Public radio content consortium
- 1.9. Television operations software or systems integration vendor
- 1.10. Television asset management software vendor
- 1.11. Radio operations software or systems integration vendor
- 1.12. Radio asset management software vendor
- 1.13. Educational organization addressing digital content (video-based Learning Objects) labeling issues
- 1.14. National organization (non-public broadcasting) addressing digital content labeling, exchange and preservation issues

1. UNDERSTANDING THE PROBLEM:

- 1.19. Do you understand why (PB) public broadcasting needs a standardized "core" metadata dictionary?
 - 1.19.1. If yes, why? For what applications?
 - 1.19.2. If not, is it because you don't understand the concept of "metadata?"
 - 1.19.3. Or is it because you believe PB should adopt another existing standard? If so, what metadata standard should it use instead?

2. USEFULNESS:

- 2.19. In what ways does the PB Core appear intuitively useful to your organization or the organizations with which you communicate with and/or exchange assets with, as a solution to specific sets of problems in describing media assets?
 - 2.19.1. What are some of these "asset description" problems? Are they internal to your organization, or do they relate to asset information sharing with other organizations?
- 2.20. If you have an existing collection of metadata, or work with organization that does, can you imagine easily mapping those current fields of information to the PB Core Elements?
- 2.21. Would you be willing to be contacted as a potential "alpha site" for testing this mapping process?

3. EVALUATION OF DATA ELEMENTS:

- 3.19. From the attached list of 59 PB Core elements, please select the top 10-12 elements that would be most relevant to your organization. Give these elements a score of "5".
- 3.20. Look at the list once again. Select up to ten (10) additional fields that would also be used a great deal by your organization in either describing its internal assets or when sharing them with others. Give these items a score of "4".
- 3.21. If there are any really *confusing* fields indicate them with a "C".
- 3.22. Finally, are there data elements or other enhancements that you feel need to be *added* to the PB Core? If yes, please explain.
 - 3.22.1. What are they?
 - 3.22.2. Are they specific to your organization, or do you feel that they should be part of the PB Core?

4. IMPLEMENTATION ISSUES:

- 4.19. Do you anticipate that implementation of the PB Core into your organization, or into those you work with, would require significant cultural or workflow changes?
 - 4.19.1. If yes, please explain. What would be the core issues?
- 4.20. What groups/roles in your organization would need to be trained to use the proposed PB Core?

Question Set #2 (For Experts)

1. ID: What type of organization do you represent?

- 1.1. Public television station (broadcast ops and local production)
- 1.2. Public radio station (broadcast ops and local production)
- 1.3. Public television national producer (station or independent)
- 1.4. Public radio national producer (station or independent)
- 1.5. Public television national distributor
- 1.6. Public radio national distributor
- 1.7. Public television content consortium
- 1.8. Public radio content consortium
- 1.9. Television operations software or systems integration vendor
- 1.10. Television asset management software vendor
- 1.11. Radio operations software or systems integration vendor
- 1.12. Radio asset management software vendor
- 1.13. Educational organization addressing digital content (video-based Learning Objects) labeling issues
- 1.14. National organization (non-public broadcasting) addressing digital content labeling, exchange and preservation issues

2. UNDERSTANDING THE PROBLEM:

- 1.15. Do you feel you have a full understanding of the function of the PB Core?
- 1.16. Do you believe that (PB) public broadcasting needs a standardized "core" metadata dictionary?
 - 1.16.1. If yes, why? For what applications?
 - 1.16.2. If no, why? Is it because you believe PB should adopt *another* existing standard?
 - 1.16.3. If so, what other metadata schemas have you investigated? What are their benefits over the proposed PB Core?

3. USEFULLNESS:

- 1.17. In what ways does the PB Core appear useful to your organization or the organizations with which you communicate with and/or exchange assets with, as a solution to specific sets of problems in describing media assets?
 - 1.17.1. How would the PB Core element set be effective in providing a complete markup of the rich media assets of your organization?
 - 1.17.2. In general terms how would using or mapping to the PB Core element set facilitate asset discovery by your customers or constituents?
 - 1.17.3. Can you describe scenarios in which implementation of the PB Core would afford new revenue or service opportunities for your organization or for those with whom you work?
- 1.18. Describe how might your organization implement the PB Core as a methodology or tool?

- 1.18.1. By mapping your existing data fields to the PB Core (from tape libraries, production databases, traffic and operations software, etc.)?
- 1.18.2. By beginning an asset digitization/management process using the PB Core?
- 1.18.3. By mapping an existing data dictionary from a current asset management system to the PB Core?
- 1.19. Are there metadata creation or translation projects planned or underway in which you would recommend that the PB Core be tested?
- 1.20. Would you be willing to be an "alpha site" for testing this mapping process?

4. EVALUATION OF DATA ELEMENTS:

- 1.21. Does the fundamental reliance on the Dublin Core Element Set seem appropriate? Please explain any concerns.
- 1.22. Does the PB Core appear to favor a particular type or size of asset?
- 1.23. The PB Core is designed to apply a "1:1 principle," meaning that only one object or resource may be described with a single metadata set. Does this work for your organization?
- 1.24. Does the PB Core Application Profile (*Element Number, Element Name, Version of the Element, Element Label, Definition, Namespace Identifier, Registration Authority, Language of the Element, Obligation in Usage, Data Type, Maximum Occurrence, Encoding Schemes, Restricted Values, Examples and Usage Guideline*) provide you with enough information to implement the PB Core?
- 1.25. Please rate, (on the attached web-based form) using a scale of 1-5 (with 1 as low, and 5 as high), the anticipated relevance to your organization, or those with whom you work, of each of the 59 PB Core elements. Try to include at least 12 items as critical to all PB organizations by rating them with a "5".
- 1.26. If there are any really *confusing* fields indicate them with a "C".
- 1.27. Finally, are there data elements or other enhancements that you feel need to be *added* to the PB Core? If yes, please explain.
 - 1.27.1. What are they?
 - 1.27.2. Are they specific to your organization, or do you feel that they should be part of the PB Core?

5. IMPLEMENTATION ISSUES:

- 1.28. Do you anticipate that implementation of the PB Core into your organization, or into those you with whom you work, would require significant cultural or workflow changes?
 - 1.28.1. If yes, please explain. What would be the core issues?
- 1.29. What groups/roles in your organization would need to be trained to use the proposed PB Core?
 - 1.29.1. What levels of training would be needed for each group?
- 1.30. With "3" as "highly useful" and "0" as "not at all useful", rank the following PB Core presentation formats/templates:

- 1.30.1. Application Profile in printable PDF;
- 1.30.2. Website Utility Tool (with registration authority URLs for every element);
- 1.30.3. FileMaker Pro Database or other GUI template that could be used to initiate a metadata collection using the PB Core;
- 1.30.4. Other (please describe).

Communications

Announcing the RFC Process

In coordination with the Phase 4 marketing plan, to alert the public broadcasting community to the process, a general announcement will be made to the public television system (via PBS Express), and the public radio system (via NPR DACS and the PubRadio listserv).

Invited Participants

Each invited participant will receive a letter that outlines the process, ensures their confidentiality, and advises how they will be informed of the results.

Reporting Results

The full results will be made available to the Working Group, including a compilation of the individual comments. The Dictionary Development Team (Task Team "D") of the Working Group will determine if and how to revise the PB Core to reflect the feedback received, and will make necessary adjustments prior to the ensuing Test Implementation phase.

In coordination with the Phase 4 marketing plan, an executive summary will be made available to participants, and to the public via a press release sent to Current, Broadcasting & Cable, and other related publications to be determined.

Timeline

The entire feedback solicitation period will take place in Phase 4. The Working Group will receive the survey first, and will have two weeks to complete. Invited participants are to receive the survey shortly thereafter, and will have six weeks to complete.

The Dictionary Team will prepare the PB Core for final presentation for this survey – in a manner that best facilitates the element-specific questions -- within approximately one week of the RFC team's finalization of the survey.

It is estimated to require an additional two weeks to summarize and identify issues, and to develop the reports as listed above.

Cost

Sub-contracting services are estimated at \$20,000. Web survey services are estimated at \$10,000. Total budget is estimated at \$30,000.