

Task Team E – RFC and Testing

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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.

Recommended Activities:

1. Draft a list of RFC participants. (Use attached AW list as start. Note that the first RFC pass will be made with members of the working group.)

2. Determine what we want to learn from the RFC process. (AW wonders who the audience is for the RFC results. Mostly, it's the Dictionary Team, who will need to update and/or refine the PBCore as a result, but it is also CPB TV FF and affects future funding, and perhaps the national distribution organizations, affecting their sense of the dictionary's role and their own responsibilities and interest in it.) (See Alan Baker's draft list below.)

- What institutions and activities are best served by this metadata?
- How well do our elements, modifiers, and rules of application work for various organizations?
- Who could we get to buy-in with minor modifications, and what are those modifications?
- How does this dictionary map to other known or emerging standards?
- What design flaws are present?
- What design compromises are inconvenient, but not fatal, flaws?
- What limitations will we find first, and are there ways to fix this within the current design (e.g. no way to track encoding schemes)?
- Are there technological hurdles that we'll run into as we implement our design?
- Will other industries map to it?
- Will vendors adopt it? What would motivate them?
- Can producers easily adopt it?

3. Draft a list of RFC questions.

Questions for the PBMWG (from the Dictionary Team):

- Do these fields, and modifiers, serve the needs you originally entered the project hoping to address?

- Do you believe the design is simple enough for public broadcasters and their clientele to use?
- What are the most critical problems in your organization that the metadata dictionary will solve?
- What pressing problems, organizationally or data management, are not addressed that you thought would be?
- What new challenges do you now see that you will face if you attempt implementation?
- Do you feel your input has been effectively employed to craft a solution that is a good compromise for all involved?
- Name three things you think are missing from the data dictionary.
- Name three things that you will not use in the data dictionary.
- Will your organization and those you polled for this initiative be able to implement this methodology in the next 18 months?
- Can your organization do this work with your own resources or is there a need for assistance?

Questions for the RFC (from AW and Dictionary Team):

- What type of organization do you represent?
 - Public television station (broadcast ops and local production)
 - Public radio station (broadcast ops and local production)
 - Public television national producer (station or independent)
 - Public radio national producer (station or independent)
 - Public television national distributor
 - Public radio national distributor
 - Public television content consortium
 - Public radio content consortium
 - Television operations software or systems integration vendor
 - Television asset management software vendor
 - Radio operations software or systems integration vendor
 - Radio asset management software vendor
 - National organization (non-public broadcasting) addressing digital content labeling, exchange and preservation issues
- Do you feel you have a full understanding of the function of the PBCore?
- Does the PBCore appear intuitively useful to your organization, or the organizations with whom you work, in describing rich media assets (analog or digital)?
 - Would the PBCore element set be effective in providing a complete markup of the rich media essence?
 - Would it be necessary to add further fields of metadata in order to catalog the rich media as desired?
 - Would you prefer to use a smaller subset of the PBCore to describe assets?
 - The PBCore is designed to apply a "1:1 principle," meaning that only one object or resource may be described with a single metadata set (leaving how the element sets are linked to form a single record left a local database implementation issue). Does this work for your organization?

- 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 PBCore Elements?
- Does the PBCore appear intuitively useful in exchanging metadata between institutions, systems, departments, etc.?
- Does the fundamental reliance on the Dublin Core Element Set seem appropriate and beneficial?
- In general terms, would using or mapping to the PBCore element set facilitate asset discovery by your customers or constituents?
- Does the PBCore appear to favor a particular type or size of asset?
- Does the PBCore Application Profile (listing 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 Dictionary into your existing asset management process, or to begin a new process?
- Are there data elements that you feel need to be added to the PBCore? If yes, please explain.
- Please rate, on a scale of 1-5, the anticipated relevance to your organization, or those with whom you work, of each of the 59 PBCore elements.
- Would you recommend any enhancements to the PBCore Application Profile? If yes, please explain.
- How might your organization implement the PBCore as a methodology or tool?
 - By mapping your existing data fields to the PBCore (from tape libraries, production databases, traffic and operations software, etc.)?
 - By beginning an asset digitization/management process using the PBCore?
 - By mapping an existing data dictionary from a current asset management system to the PBCore?
- Are you able to recognize the PBCore as a solution to a specific set of problems within your organization, or those with whom you work?
- Can you describe scenarios in which implementation of the PBCore would afford new revenue or service opportunities for your organization or for those with whom you work?
- For implementation, do you feel that a complete understanding of the PBCore, or of metadata standards in general is necessary across your organization, or would this information/training be confined to a small set of individuals?

- Do you anticipate that implementation of the PBCore standard into your organization, or into those you with whom you work, would require significant cultural or workflow changes? If yes, please explain.
- In what form would the PBCore be most valuable to your organization? (Choose up to four.)
 - Application Profile in printable PDF;
 - Website Utility Tool (with registration authority URLs for every element);
 - FileMaker Pro Database or other GUI template that could be used to initiate a metadata collection using the PBCore;
 - Other (please describe).
- If upgrades to the PBCore were routinely necessitated, how frequently could your organization or those with you work perform the required mapping updates (annually, bi-annually, etc.)?
- Would your organization, or those with whom you work, be willing or able to contribute a small annual fee to use the PBCore, such that its maintenance could be ensured? What kind of input into the dictionary, or technical support would you expect?
- Are there metadata creation or translation projects planned or underway in which you would recommend that the PBCore be tested?

4. Determine how to conduct RFC process:

- Should we just inform the people on our RFC list by e-mail letter (who will write this letter?), or should we make a general announcement via PBS Express and pubradio? (AW recommends the former.)
- Should the RFC be posted on the PBMD public website, or should it be password-protected?
- In what form should the material be presented for review? (See http://www.ntia.doc.gov/ntiahome/broadband/frnotice_111401.htm for an example of an NTIA RFC.) Should we create a web survey? (See http://www.websurveyor.com/home_iss.asp, and <http://www.netreflector.com/?Google-websurvey&LID=4375572>.)
- Should we conduct a web conference to present the preliminary dictionary and RFC to participants?
- Should there be a glossary of terms that goes with the PBCore RFC (defining, e.g., Application Profile, attribute, element, instantiation, metadata, essence, asset, registration authority, resource, controlled vocabulary, etc.)?
- In what manner should participants respond? (Paul Burrows writes "To be academic, we may want to capture answers in consistent, reliable Likert Scale Q&A (1 through 5 type responses) in addition to asking free-form questions).)
- Should we also provide a blog functionality on the public site, in order to encourage a healthy dialogue?

5. Determine how to compile, analyze and report on results of the RFC process, keeping in mind the audiences determined above, and for what purposes the RFC findings will be used.

6. Determine the timeline for the RFC process.

7. Estimate the cost of the RFC process.

- Budget may include creation of web survey, enhancements to the CPB PBMD website by KUED, web conferencing fees, compilation of results, statistical or other analysis of results, creation of final report on RFC findings.

8. Develop a Test Plan, which contains:

- Statement of Purpose (determine, in general terms, whether we are trying to “assess” the PBCore’s basic conceptual models and effectiveness, or to “validate” that the PBCore meets some set of performance standards that we have agreed to, or BOTH, in two phases?)
- Problem Statement/Learning Objectives, e.g.:
 - Are the PBCore registry and User’s Guide effective?
 - Does test or actual implementation of the PBCore require the creation of a new or temporary data repository within an organization?
 - How difficult is it to map the records from an existing database to the PBCore? What software or other tools, efforts are necessary? What is the cost of creating and using these tools or conducting this process? Is coding the data elements in HTML and XML necessary?
 - How effective is the PBCore when it’s used as a data interoperability/translation tool (i.e. when data is extracted from one software system, mapped to the PBCore, then exported into another software system by being mapped back to those data fields)?
 - Can the PB Core be used to initiate a digitizing/archiving process, or would it be likely to require a more intuitive user interface? Is the PBCore effective in providing a complete markup of rich media essence, or are more fields required?
 - How effective is the PBCore in directly assisting asset or record discovery?
 - What might need to be tested in a subsequent phase?
- User Profiles (See Participants List below; what do the projects do, and why are they appropriate to test implementation of the PBCore.)
- Test Methodology (Exactly what will be tested, and how? What are the basic assumptions that go across all the participants about how they will conduct test activities? What are the other ground rules?)

- Task List
- Test Environment/Equipment Needed (make as realistic as possible, in terms of workflow and costs)
- Test Monitoring
- Evaluation Measures (data to be collected, how analyzed, criteria.)

9. **Draft and then finalize a list of Test Implementation participants;** use AW's starter list below, and perhaps query whole working group:

- NPR Content Depot or NPR Archives
- WGBH DAM Project
- PBS Orion Database (MP recommends mapping Moyer's NOW to PODS and NPR databases)
- AMIA Moving Image Collections (MIC) Project
- KUED "Utah Collections" Multimedia Encyclopedia
- Kentucky Network Digitization Project
- Annenberg Digitization Project
- Minnesota Public Radio Archive Project
- CPB-funded independent production TBD

10. **Draft a sample memo of understanding between participants and testing group** (Spell out responsibilities of each, include investment of equipment, personnel time, etc., as well as what can be done with the results.)