

TDL Metadata Working Group

Metadata Training Needs Assessment: Final Report



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TABLE OF CONTENTS

	Page
Table of Contents	i
List of Tables	iii
List of Figures	iv
Acknowledgements.....	v
Introduction	1
Data Collection Procedures and Responses.....	2
Institutional Status on Metadata-Related Projects Undertakings.....	4
Metadata Knowledge and Experience	8
Metadata Knowledge	8
Metadata Experience.....	9
Types of Metadata Training.....	12
Expectations for Metadata Courses.....	14
Follow up Email Survey.....	15
Summary.....	16
Type of Course.....	17
Teaching Style.....	17
Platform or Formats.....	17
Topic Specificity.....	18
Other Aspects.....	18
Conclusion	18

APPENDICIES	20
Appendix 1: Survey Questionnaire Cover Letter.....	21
Appendix-1: Survey Questionnaire	22
Appendix-2: General Information linked from/to the invitation email.....	24
Appendix-3: Call for Survey Participation	25
Appendix-4: Gentle Reminder Email for Survey Invitation.....	26
Appendix-5: Follow-Up Survey Questions	27
Appendix-6: Types of Metadata Training	28
Appendix-7: Invitation Email to Follow-up Survey Invitation	29
Appendix-8: Follow-up response by Institutions' Types.....	30
Appendix-9: All Participating Institutions by Types	36
Appendix -10: TDL Metadata WG Committee members (2010).....	39

LIST OF TABLES

Table	Page
1. Institutional Status on Metadata-Related Projects Undertakings	5
2. Sample Comments on Institutional Status on Metadata Related Projects	7
3. General Knowledge of Metadata	8
4. Metadata Implementation Experience	10
5. Sample Comments on Individual Experience and Knowledge of Metadata	11
6. Additional Comments on Metadata Training Expectations.....	14
7. Distribution of Respondents by Institution Type.....	15
8. Types of Metadata Training.....	28
9. Follow-up response by Institutions' Types.....	30
10. Participating Institutions by Types (N=110)	36

LIST OF FIGURES

Figure	Page
1. Number of Invited Participants by Institution Type (N=1302)	3
2. Distribution of Survey Respondents by Institution Type	4
3. Overall Institutional Status on Metadata Related Projects Undertakings	5
4. Texas Academic Institutions' Metadata Related Projects Undertakings	6
5. Mode of Metadata Knowledge by Institution Type	9
6. Overall Metadata Implementation Experience	10
7. Modes of Metadata Training Course Topics	12
8. Mode of Rank of Possible Metadata Course Topics by Institution Type	15

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I would like to thank the people in various cultural heritage institutions across Texas who responded to our survey, and willingly gave of their time to provide the data that made this metadata training needs assessment possible. Special thanks go to the current chair of Texas Digital Library Metadata Working Group (TDLMWG), Amanda Harlan, for her editorial helps, and also for additional summary of the most recent activities of the work group. On behalf of TDLMWG members, I would also like to thank all individuals, who supported the TDLMWG initiatives, in one way another.

Introduction

The Texas Digital Library (TDL) Metadata Working Group (MWG) was reactivated in 2009 to provide TDL with general metadata expertise. Additionally the working group (WG) develops and recommends best practices and provides guidance on current status and future trends in metadata development in ways that support the overall objectives of TDL. For the purposes of this paper, the focus will be on the project that was tasked in creating metadata course/modules for beginner and expert alike.

In order to identify specific training needs, the MWG agreed that a survey would be the most appropriate tool to gather this information. Daniel Gelaw Alemneh, from the University of North Texas, was assigned as the lead person for the project. The first step taken was brainstorming possible survey questions during a meeting and revising them through Google documents. Once the questions had been finalized and approved, they were incorporated into a survey tool called Snap to create a web-based survey questionnaire (Appendix 1¹), which was eventually sent to individuals at Texas' academic libraries, public libraries, museums, and other cultural heritage institutions.

The purpose of the survey was to gather information from Texas cultural heritage institutions (TDL member institutions and friends of TDL) about their metadata needs. This information would help TDLMWG create training courses that expanded on participants' current knowledge about metadata and digital asset management.

¹ Appendix 1 includes a copy of the final questionnaire, which was administered online using Snap—a Baylor University survey tool.

Accordingly, the survey focused on gathering this information:

- Demographic information regarding institutional affiliation and position of the respondents, etc.;
- Current knowledge of metadata;
- How metadata is being utilized at their institution; and
- Expectations on what kind of metadata courses should be offered.

The questionnaire was designed to be open-ended allowing participants to express their opinions through the options and comment sections provided with each question. Optionally, participants could provide contact information if they wanted to participate in the follow up email survey providing more in-depth feedback.

Data Collection Procedures and Responses

The WG recognized that promoting the availability of the survey among Texas cultural heritage institutions was one of the most important factors that could determine our ability to attract the right audience and generate a wide response to the metadata training needs assessment. In this regard, more than 1300 potential participants were identified via various professional associations and list groups in Texas: 145 (11%) Academic Institutions, 549 (42%) Public Libraries, and 608 (47%) Other Institutions (Museums, Information Centers, Etc.) in Texas (see Figure-1).

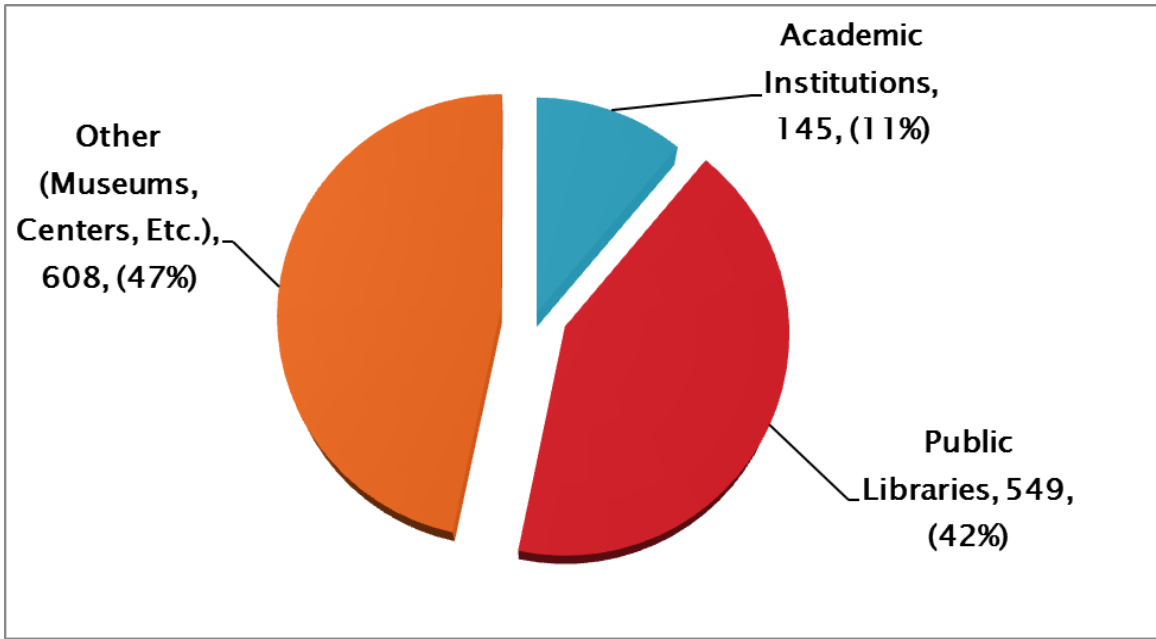


Figure-1: Number of Invited Participants by Institution Type (N=1302)

Invitations to participate in this study were sent in the first week of February (see Appendix-2) followed by a reminder email (see Appendix-3) a week later. The survey had a two-week turn-around (from February 2, 2010 to February 16, 2010), which might seem a relatively short period for data collection, but 93 (about 85%) participants out of 110 total responded during the first week (see Figure-2). This supports previous researches where a large if not a majority of survey responses were submitted within 24-48 hours of exposure. Looking at Figure-2 the majority of respondents were from academic institutions followed by public libraries and other institutions in that order.

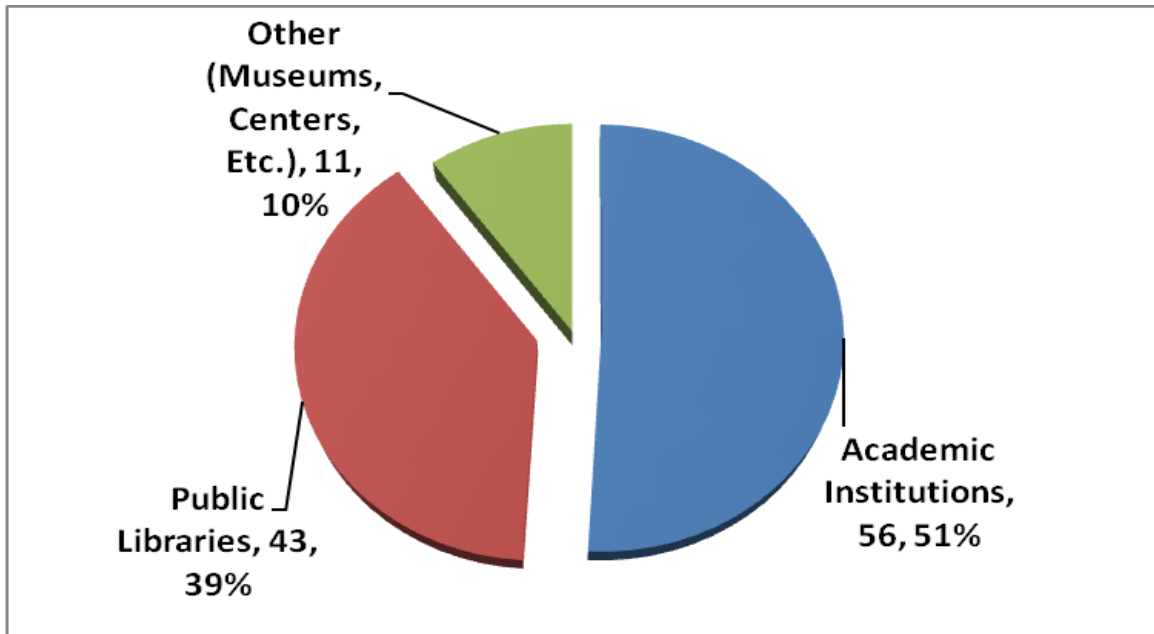


Figure-2: Distribution of Survey Respondents by Institution Type

Institutional Status on Metadata-Related Projects Undertakings

Respondents were asked to categorize their institutional status on metadata related projects undertakings. Although academic institutions are among the early adopters of metadata related projects, as can be seen from Table-1 and Figure-3, the overall status regarding metadata related projects activities does not seem encouraging. About 42% of the respondents have no short term plan to work on any metadata related undertakings. Almost three fourths of public libraries in Texas who responded to the survey have no plans at all. We could speculate further on this but if academic institutions were taken out of this analysis, the picture would be very bleak.

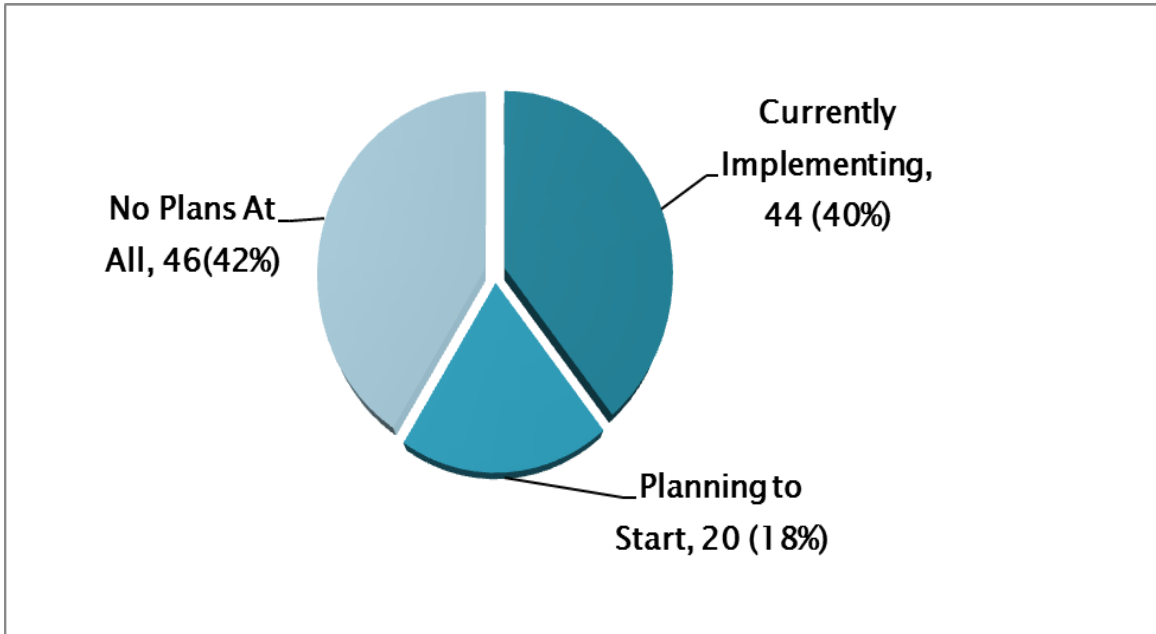


Figure-3: Overall Institutional Status on Metadata-Related Projects Undertakings

Institution Type	Implementing	Planning	No Plan	Total
Academic Institution	32 (57%)	13 (23%)	11 (20%)	56 (100%)
Public Libraries	6 (14%)	5 (12%)	32 (74%)	43 (100%)
Other	6 (55%)	2 (18%)	3 (27%)	11 (100%)
Total	44 (40%)	20 (18%)	46 (42%)	110 (100)

Table-1: Institutional Status on Metadata-Related Projects Undertakings

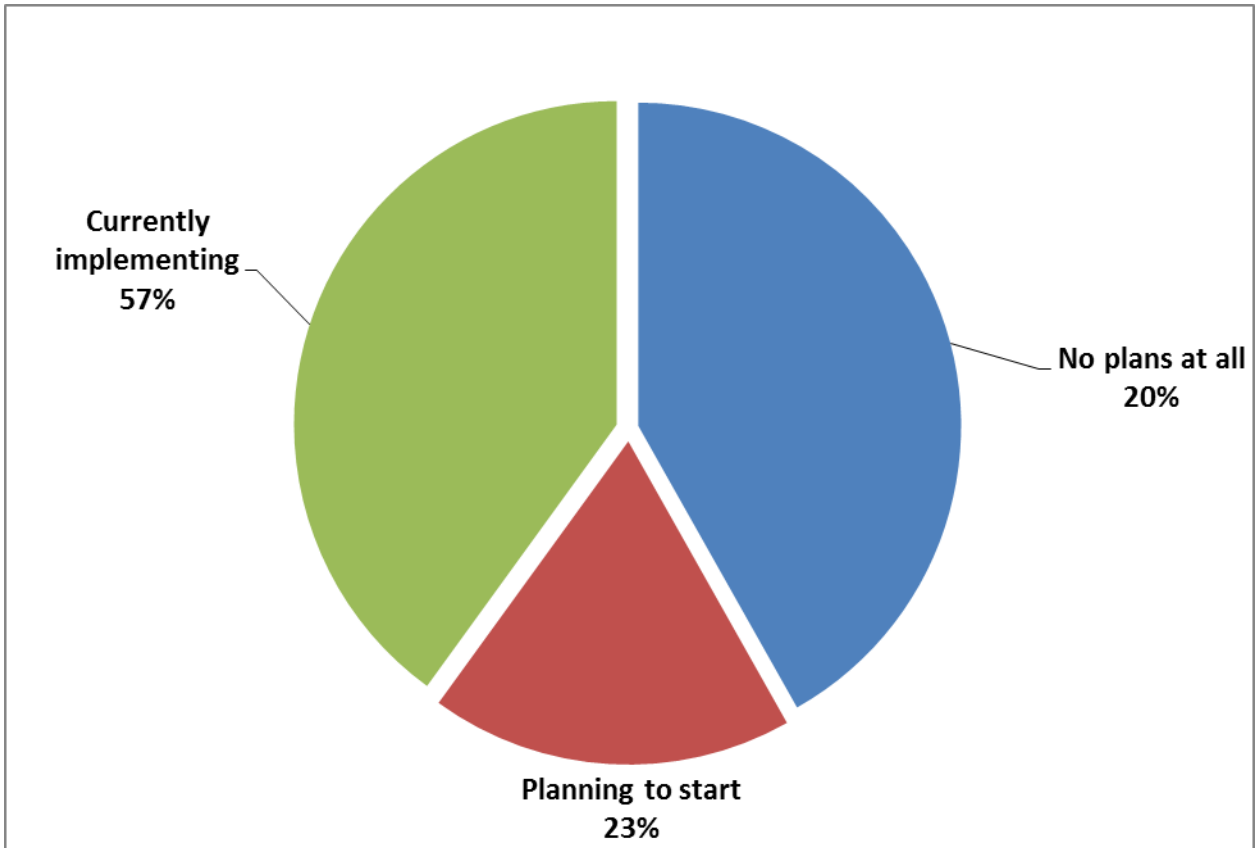


Figure -4: Texas Academic Institutions' Metadata Related Projects Undertakings

As can be seen from Table-1 and Figure-4, relatively, academic institutions are at the forefront of metadata related projects undertakings. However, about three fourths (74%) of public libraries and more than one fourths (27%) of other cultural heritage institutions in Texas have no immediate plans to implement metadata-related projects. Table-2 further solidifies this by comments participants made concerning their metadata related projects experiences, which ranged from extremely active to no metadata related initiatives at all.

Table-2: Sample Comments on Institutional Status on Metadata Related Projects

No	Comments on institutional status on metadata related projects
1	I work with ETDs and we collect metadata for use in our digital repository.
2	Implementing Content DM for with Dublin Core for digitized images, student newspaper, oral histories
3	Limited implementation in our cataloging. We are a small operation.
4	Not sure how our members can/do utilize metadata.
5	Small public library. Would probably only do something like this at the consortium level.

Remember that out of the 549 possible public library participants only 43 (about 8%) responded, and out of the 608 possible other (museums, centers, etc.) participants only 11 (about 2%) responded. On the other hand, out of the 145 possible academic institution participants 56 (about 39%) responded. If there was an increase in respondents from the public libraries and other cultural heritage institutions (museums, centers, etc.) the numbers might be very different concerning metadata implementation but would also provide a much more balanced view of things.

Metadata Knowledge and Experience

Metadata Knowledge

A wide differential exists between participants from different cultural heritage institutions concerning their level of metadata knowledge, ranging from extremely proficient to no knowledge at all. Table-3 and the mode in Figure-5 (or rating that occurred the most frequently), shows that most respondents from public libraries (83%) have extremely low metadata knowledge (with five or less of 1 to 10 ratings), whereas academic institutions (75%) have a very high metadata knowledge (with six or more of 1 to 10 ratings).

Table-3: General Knowledge of Metadata (1 being lowest and 10 being highest)

Institution Type	One	Two	Three	Four	Five	Six	Seven	Eight	Nine	Ten	Total
Academic Institution	1 (2%)	1 (2%)	4 (7%)	1 (2%)	7 (12%)	3 (5%)	8 (14%)	13 (23%)	7 (13%)	11 (20%)	56 100%
Public Libraries	18 42%	4 (9%)	4 (9%)	4 (9%)	6 (14%)	1 (3%)	2 (5%)	1 (2%)	1 (2%)	2 (5%)	43 100%
Other	0 (0%)	0 (0%)	0 (0%)	0 (0%)	3 (28%)	2 (18%)	1 (9%)	1 (9%)	3 (27%)	1 (9%)	11 100%
Total	19 (17%)	5 (5%)	8 (7%)	5 (5%)	15 (14%)	6 (5%)	11 (10%)	15 (14%)	11 (10%)	14 (13%)	110 100%

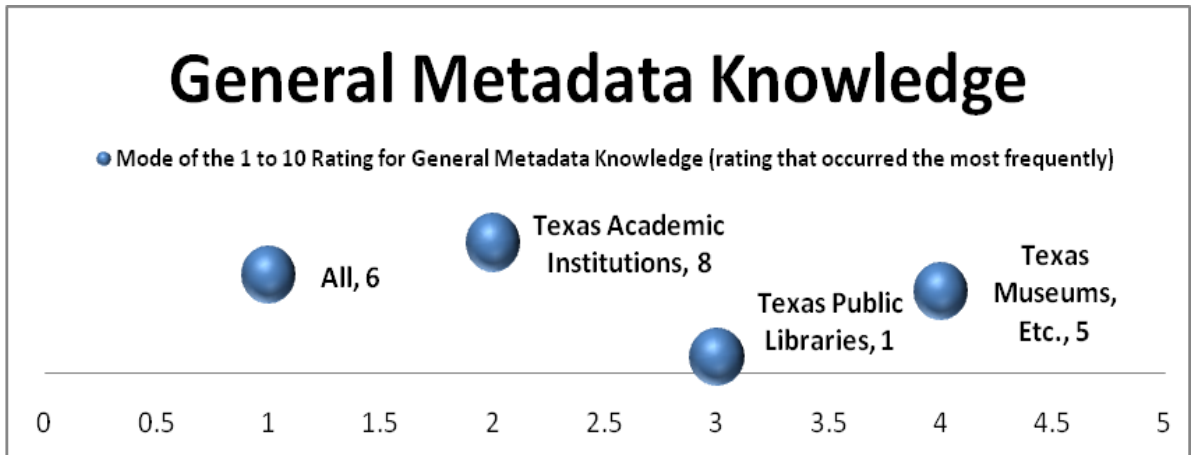


Figure-5: Mode of Metadata Knowledge by Institution Type

Metadata Experience

Concerning metadata-related experience, again participants' responses ranged from a tremendous amount of metadata experience to no metadata experience at all—some even mentioning they had heard of metadata but did not really understand the concept of it. Table-4, Figures-5 and 6 highlight this by showing that academic institutions tend to show a relatively high level of experience compared to public libraries and other types of cultural heritage institutions. This is probably due to academic institutions' high level of participation and engagement (Figures 2 & 4) in various metadata and digital library related activities.

Table-4: Metadata Implementation Experience

(1 = no metadata experience to 10 = tremendous amount of metadata experience)

Institution Type	One	Two	Three	Four	Five	Six	Seven	Eight	Nine	Ten	Total
Academic Institution	11 (20%)	5 (9%)	4 (7%)	4 (7%)	5 (9%)	2 (4%)	8 (14%)	8 (14%)	2 (4%)	7 (12%)	56 100%
Public Libraries	21 49%	3 (7%)	8 (19%)	1 (2%)	6 (14%)	2 (5%)	0 (0%)	1 (2%)	0 (0%)	1 (2%)	43 100%
Other	0 (0%)	1 (9%)	2 (18%)	0 (0%)	1 (9%)	3 (28%)	0 (0%)	2 (18%)	2 (18%)	0 (0%)	11 100%
Total	32 (29%)	9 (8%)	14 (13%)	5 (5%)	12 (11%)	7 (6%)	8 (7%)	11 (10%)	4 (4%)	8 (7%)	110 100%

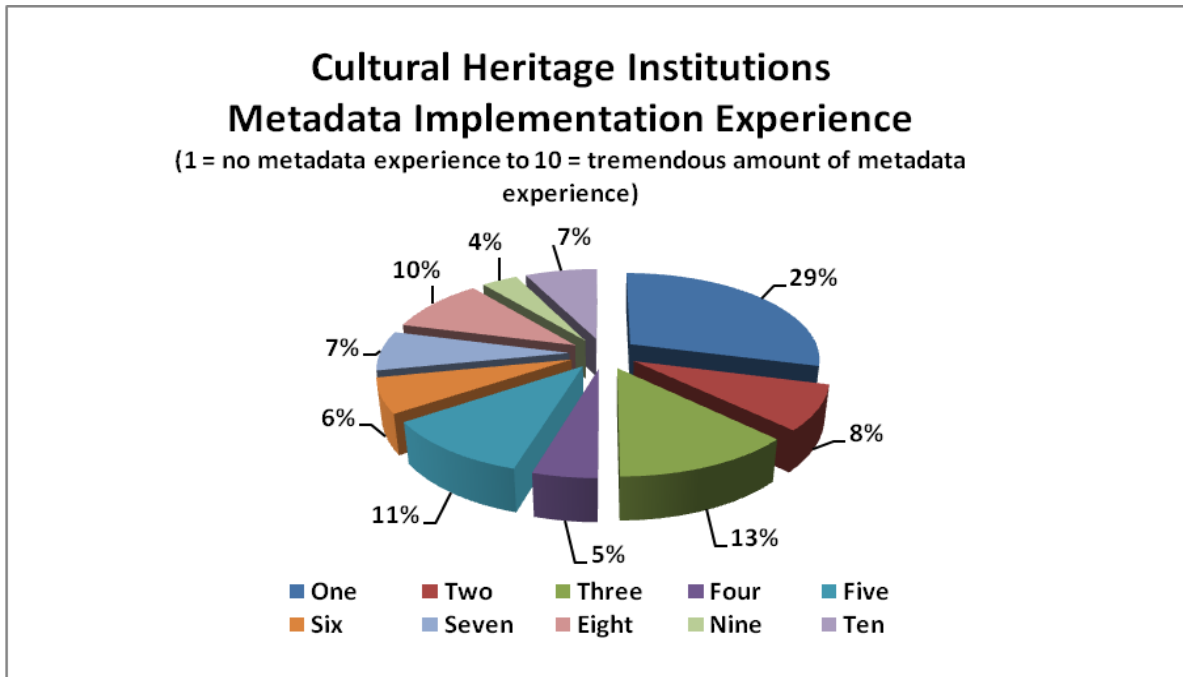


Figure-6: Overall Metadata Implementation Experience

Table-5 lists additional comments on individuals' metadata related experiences that validate this.

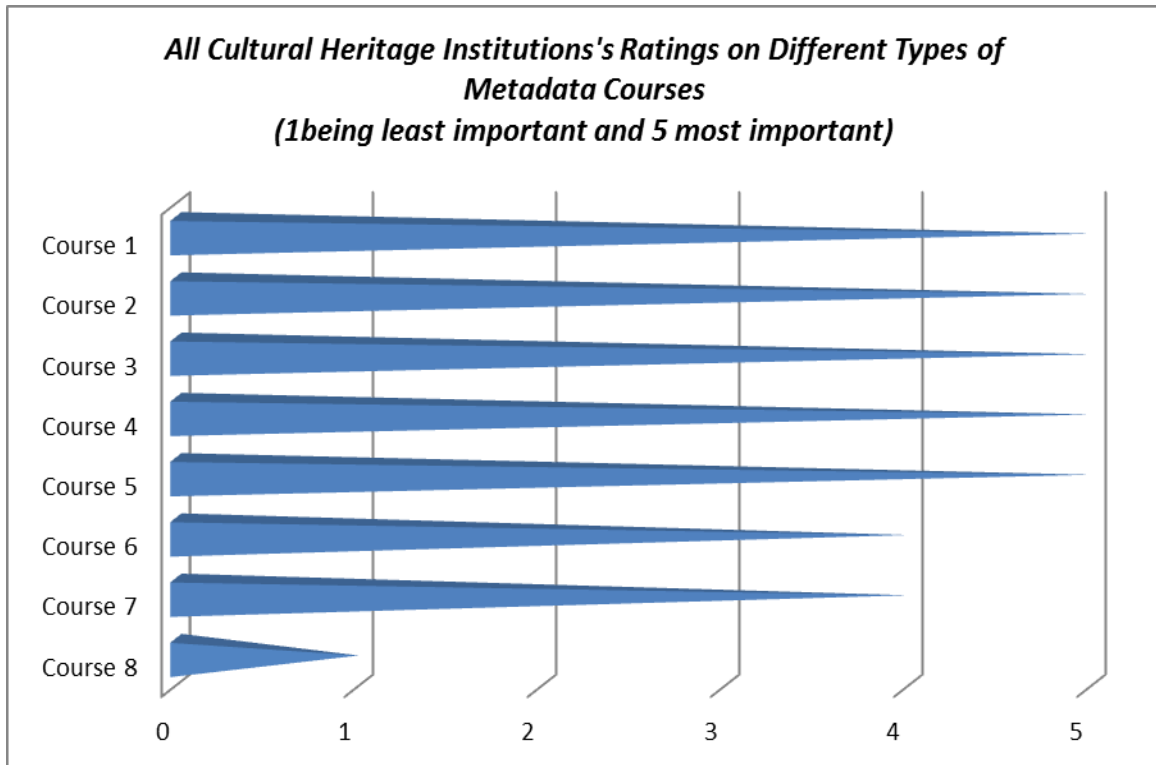
Table-5: Sample Comments on Individual Experience and Knowledge of Metadata

No	Comments on Metadata Experience/Knowledge
1	From what I have been told, I am assuming that cataloging experience with MARC will provide useful, transferable skills in working with other metadata schema and workflows.
2	Has to do with cataloging, right?
3	Member of CDP's Dublin Core Best Practices Working Group, Co-PI for the RMOA EAD db
4	Our biggest problem is that we haven't established standards for our metadata -- something that needs to be done. We do have a database based on Dublin Core but our management is pushing us into using SharePoint for our photographs so I've tried to adapt to Dublin Core.
5	We have little knowledge or experience with metadata implementation.

All this underlines what has been mentioned above concerning institutional status of metadata implementation and metadata knowledge where academic institutions seem to be at the forefront concerning metadata, but public libraries and other institutions (museums, centers, etc.) are not.

Types of Metadata Training

In trying to identify potential areas for future metadata training courses, the metadata training needs assessment survey helped address this. Respondents ranked several possible metadata course topics from least important (1) to most important (5).



Course 8: Other Training Options

Course 7: Programming for Metadata

Course 6: Tools for Metadata management

Course 5: Advanced metadata management, quality assurance, and interoperability

Course 4: Intermediate level metadata creation, storage, and management

Course 3: Introduction to Specific Metadata Standards and Applications (DC, METS, etc.)

Course 2: Hands on Descriptive Metadata Creation

Course 1: General Overview of Metadata

Figure-7: Modes of Metadata Training Course Topics

As can be seen from Figure-7, most participants ranked the courses that either gives an overview of metadata, advice on the practical application of metadata, or learning about a specific metadata schema the highest ranking. Whereas the more advance courses were ranked less.

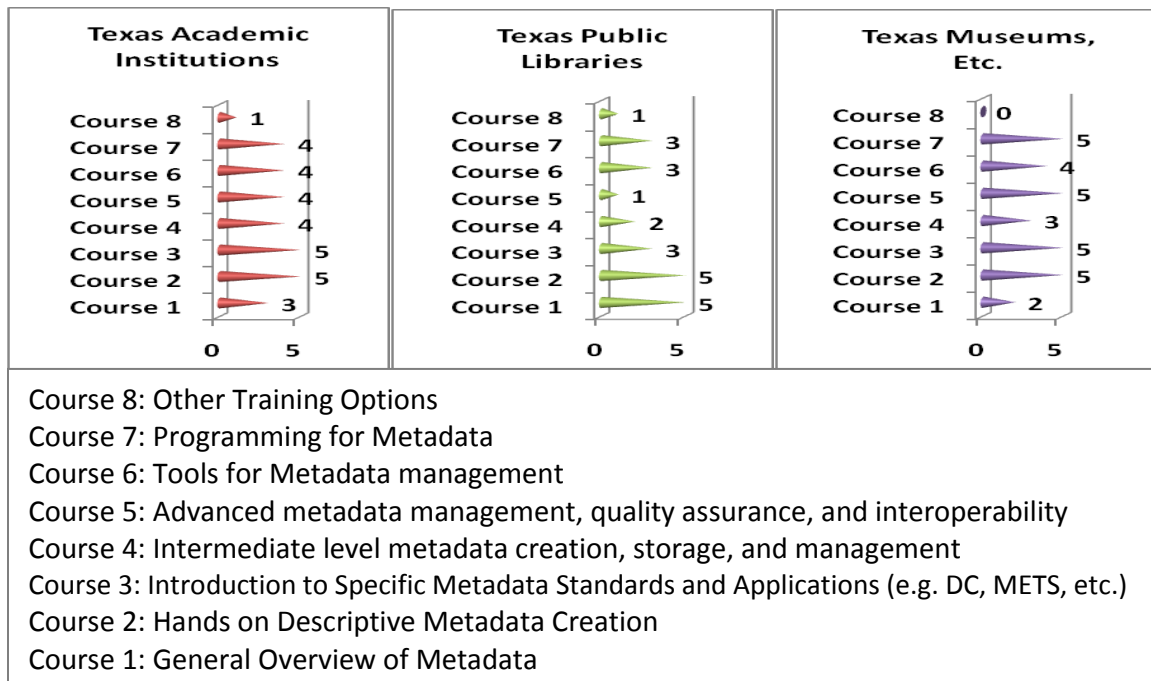


Figure-8: Modes of Rank of Possible Metadata Course Topics by Institution Type

Another interesting correlation is between the academic institutions and the public libraries, where the academic institutions ranked some of the advanced metadata courses as very important and the public libraries did not. This just underlines the data we've received so far about academic institutions and public libraries where academic institutions seem very proficient but public libraries do not concerning metadata knowledge and experience. Lastly the other cultural heritage institutions (museums, centers, etc.) were all over in terms of ranking. The participants ranked some of the entry and advance level metadata courses as very important. This is not a surprise since some museums were among the

earliest adopters of metadata. However, it should be noted that not all museums were early adopters, which is why the responses from them concerning knowledge, experience, and course rankings on metadata were sporadic.

Expectations for Metadata Courses

One of the last questions on the survey simply asked, “You may provide any additional comments, if you would like, on what you hope to learn or improve your knowledge/effectiveness from future metadata training courses or other critical areas your organization needs to address in order to successfully implement a metadata based approach to digital resource management”. As can be seen from Table-6, some participants gave valuable comments.

Table-6: Additional Comments on Metadata Training Expectations

No.	Additional comments on metadata training expectations
1	I think my cataloger colleagues would benefit from introductory/overview courses, and I would like the opportunity to learn/discuss/explore ways to introduce and implement DAM processes among traditional library workflows.
2	I would definitely like to see more programming applications taught like XSLT, XPATH, XML, XFORMS, relational databases, use of WEB 2.0 applications, etc.
3	I would like to have hands-on metadata conversion practices, including a little bit of programming or using xml. I think a course that covers several aspects of xml regarding metadata crosswalk and management would be very helpful.
4	It would be good to have a non-expert understanding of metadata (purpose and standards) so that I can better perform my job.
5	The courses would have to be clearly worth my time and money and specifically applicable to my particular digital project, which I would think would make the courses difficult to plan.

Follow up Email Survey

As can be seen from Table-7, out of 110 respondents, 73 (more than 66%) participants agreed to be contacted for a follow up email survey. Of the 73 participants that took part in the follow up Web-based survey, only 31 (about 42%) replied. Again the vast majority of respondents were from academic institutions.

Table-7: Distribution of Respondents by Institution Type

Institution Type	Survey Participants	Participants willing to be contacted for follow- up	Participants who responded to follow up survey
Academic Institution	56 (51%)	49 (67%)	26 (84%)
Public Libraries	43 (39%)	17 (23%)	4 (13%)
Other	11 (10%)	7 (10%)	1 (3%)
Total	110 (100%)	73 (100%)	31 (100%)

The follow-up questions were generic based on the overall survey results. Flexibility rather than standardization is one of the primary characteristics of such a method. Moreover, the open-ended character of this method allows respondents to talk about the subject in terms of their own frames of reference. In light of this, we asked five open-ended questions about: Type of course (in-person, online, etc.), Teaching style (lecture, hands-on, etc.), Platforms/Formats (CONTENTdm, Dublin Core, etc.), Topic specificity (Management, schema, etc.), and other issues & aspects of their metadata training needs.

The WG believed that the mixed-method approach of combining a survey questionnaire with a follow-up open-ended email question provided complementary information about the participants and their institutions. By consulting and involving actual stakeholders, their metadata training needs would be identified. Based on the identified needs, the TDL metadata working group plans to develop appropriate metadata training course that address the expressed training needs of the majority of Texas cultural heritage institutions.

Summary

At the time of the reactivation of TDLMWG in 2009, there were no metadata training courses offered by TDL. As the new metadata working group (See Appendix-8) discussed this, they realized there was a wide variety of training needs that courses could be created around. To narrow the possibilities down the WG agreed that a survey was the quickest way to identify the most pressing training needs in Texas.

Accordingly, a web-based survey questionnaire was developed based on the draft questions outlined during the Fall 2009 Working Group meeting. The goal was to take the data gathered from the survey and create training courses that would expand participants' current knowledge about metadata and digital asset management.

The top four shared needs across all responses were the following:

1. Hands on descriptive metadata creation
2. Introduction to specific metadata standards and applications
3. Advanced metadata management, quality assurances, and interoperability
4. General overview of metadata

Some respondents gave additional comments on what they felt should be offered, ranging from advanced programming courses to introduction to metadata courses. The following list of comments (direct quotes) summarizes some of the shared needs across all responses, and help in shaping the future metadata training course contents and design:

Type of Course

- “Webinar or in-person all day. Anything that would not require more than 1 overnight stay would be best.”
- “Either online training or onsite training over 2-3 days would be preferable. Half-day in-person would not be cost-effective.”
- “Having options is good. Considering budgets at this time, I would lean more toward the online course, webinar, or distance learning options.”

Teaching Style

- “Lecture with hands on.”
- “Not lecture. Hands on learning working through = real life documentation and processes.”
- “Group training with some hands-on.”
- “A hybrid would be best.”

Platform/Formats

- “Metadata in IRs, METS, MODS, XML and EAD.”
- “Dublin Core, DSpace harvesting.”
- “Am not familiar with metadata formats, so any would be fine.”
- “ContentDM Dublin Core metadata, EAD.”

Topic Specificity

- “Both! We are still new enough to this that tweaks that improve our workflows are most welcome. But we also really need specific training so that more of our staff are up-to-speed.”
- “Training on particular schemas and tools.”
- “Management/workflow issues.”
- “Particular schema and tools.”

Other Issues & Aspects

- “The application profile; harvesting and tools; MARC and non-MARC platforms in relation to metadata mapping/crosswalks; name authority in IRs and other non-MARC platforms.”

Conclusion

Overall, there was a strong level of agreement regarding the high priority towards metadata training needs. The metadata training needs assessment analyzed the responses from Texas’ cultural heritage institutions and identified specific needs related to metadata training. Although there were some commonalities among Texas cultural heritage institutions, there were notable differences particularly in terms of metadata related projects undertakings and the correlation with the level of metadata knowledge. As depicted in this document, academic institutions tend to show relatively high levels of participation and engagement in terms of metadata related activities compared to public libraries and other type of cultural heritage institutions.

The results of the metadata training needs assessment survey helped further discussions within the WG to design and create a wide variety of metadata training courses that address the metadata needs in Texas. In April of 2011, the WG offered its first metadata training course through TDL. The course covered three of the four top shared needs that Texas cultural heritage institutions felt a need for: 1. General overview of metadata; 2. Introduction to specific metadata standards and applications; and 3. Hands on descriptive metadata creation.

The course was 1 day where in the morning an overview of what metadata is and an introduction to Dublin Core were covered. The second half of the course was a lab where digital examples were provided to give class participants a chance to do hands on metadata creation. The course was a hybrid of lecturing and hands on experience, which was what most of participants of the survey wanted. The participants of this first metadata course filled out an evaluation, and most of the responses were positive and would like this course to continue with more metadata courses to follow.

Currently this is the only metadata course being offered through TDL, but it is a future goal of the WG to come up with more metadata courses that address all the metadata needs that were specified in the metadata training needs assessment survey. Lastly the main outcome that is hoped for from teaching these metadata courses is to enforce best practices and unify the way metadata is created and managed in digital asset collections for all Texas cultural heritage institutions.

Appendices

Appendix-1: Survey Questionnaire



TDL Metadata Working Group

Metadata Training Needs Assessment

(https://www1.baylor.edu/surveys/tdl/metadata_training_needs_assessment.htm)

Dear Colleague,

The Metadata Working Group was reactivated in 2009 to provide the TDL with general metadata expertise. The working group also develops best practices and provides guidance on current status and future trends in metadata development in ways that facilitate compliance at TDL.

The purpose of this survey is to gather information from Texas academic institutions, libraries, and museums about their metadata needs so that we can create training courses that expand on participants' current knowledge about metadata and digital asset management.

Please take a few minutes to complete a short online survey and help us to design appropriate training courses (at different levels of expertise) that provide a firm foundation in understanding metadata and related best practices. This survey can be completed in under 10 minutes.

Please complete the survey by Tuesday, February 16, 2010. And please feel free to forward this to colleagues you think might be interested. If you have any questions or desire further information, please contact Daniel Gelaw Alemneh at: daniel.alemneh@unt.edu.

Thanks in advance for your participation.

TDL Metadata Working Group

I. INFORMATION ABOUT YOU AND YOUR ORGANIZATION

Name:

Position:

Organization:

Organizational status on metadata-related projects undertakings:

- Currently implementing*
- Planning to start*
- No plans at all*

Comments:

On a scale of 1 to 10, (1 being lowest; 10 being highest) how would you rate the following:

	1	2	3	4	5	6	7	8	9	10
Your general knowledge of what metadata are?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your experience with metadata implementation?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

II. EXPECTATIONS FOR COURSES

We plan to design courses that cover a number of metadata related topics. Rank the topics in order of interest from 1 to 5 (1 being the lowest; 5 being the highest).

	1	2	3	4	5
General overview of metadata	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hands on descriptive metadata creation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Introduction to specific Metadata Standards and Application (e.g., DC, METS, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Intermediate level metadata creation, storage, and management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advanced metadata management, quality assurances, and interoperability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tools for Metadata management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programming for metadata	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify below):	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

You may provide any additional comments, if you would like, on what you hope to learn or improve your knowledge/effectiveness from future metadata training courses or other critical areas your organization needs to address in order to successfully implement a metadata based approach to digital resource management:

Are you willing to be contacted for follow-up questions?

- Yes, I want to provide input to help the working group determine the metadata training needs for information professionals in Texas.
- No

Since you answered "Yes" to the previous question, please provide your email address:

Thank you for providing feedback on your metadata training needs assessment through this survey!

Appendix-2: General Information linked from/to the invitation email

This survey is applicable to informational professionals from academic institutions, public libraries, state library, and museums. Nowadays everyone deals with some aspect of metadata whether information on their website, records in their online catalog, or collections of digitized materials. Digital asset management (DAM) is essential to the management of digital objects, which metadata is one component of. Without DAM, one would not have the ease of accessibility, on-going maintenance, or long-term preservation of the digital items. Your contributions will dictate to Texas Digital Library and the Metadata Working Group what kind of courses they have to create to meet the diverse needs of information professionals concerning metadata and digital asset management.

Metadata definition (simple): Structured data about data.

Metadata definition (comprehensive): Metadata is structured information that describes, explains, locates, or otherwise makes it easier to retrieve, use or manage an information resource.*

*“Understanding metadata.” NISO Press, 2004.

Digital asset management (definition): Digital asset management consists of management tasks and decisions surrounding the ingestion, annotation, cataloguing, storage, retrieval and distribution of digital assets (digital files that are either textual, images, or a type of media). This term also refers to the protocol for downloading, renaming, backing up, rating, grouping, archiving, optimizing, maintaining, thinning, and exporting files.*

*“Digital asset management.” Wikipedia (viewed Jan. 29th, 2010).

Examples of courses that might be offered:

- What is metadata, and why is it important?: Overview
- How does metadata affect digital asset management? Overview
- Dublin Core (DC) (metadata standard): Introduction
- Metadata Object Description Schema (MODS) (metadata standard): Introduction.
- How to describe digital objects: The Basics
- XSLT: Introduction
- Tools & software for metadata: Overview

Last modified by Harlan, Amanda on 1/29/10 11:29:40 AM CST.

Appendix-3: Call for Survey Participation

From: Steans, Ryan J [mailto:rsteans@austin.utexas.edu]
Sent: Tuesday, February 02, 2010 9:18 AM
To: (tdl-announce@utlists.utexas.edu)
Subject: TDL Metadata Survey

From the TDL Metadata working group:

Dear Colleague,

The Texas Digital Library (www.tdl.org) is a consortium dedicated to providing support for online scholarly communications at Texas institutions of higher learning. With the current economic climate and limited resources, the TDL is committed to creating low-cost training for its members in the areas of digital libraries and scholarly communications. In order to provide the most appropriate courses, we are gathering information from member institutions and friends of the Texas Digital Library. Please feel free to forward this short survey to the appropriate staff person in your library. The intended audience generally works in the technical services field.

On my behalf as chair of the Texas Digital Library Metadata Working Group, it is my pleasure to invite you to participate in a 3 minute survey concerning metadata (structured data about data) and digital asset management, which includes all aspects digital management. The deadline to submit responses is Tuesday, February 16th.

Link to survey:

https://www1.baylor.edu/surveys/tdl/metadata_training_needs_assessment.htm

Link to additional information: <http://tinyurl.com/yep2h6g>

Thank you for your time. If you have any further questions, please contact Daniel Alemneh at: daniel.alemneh@unt.edu.

Amanda Harlan
Chair, Texas Digital Library Metadata Working Group
Metadata & Catalog Librarian
Baylor University Libraries
One Bear Place, #97148
Waco, TX 76798

Appendix-4: Gentle Reminder Email for Survey Invitation

From: Harlan, Amanda [mailto:Amanda_Harlan@baylor.edu]
Sent: Tuesday, February 09, 2010 1:51 PM
To: (tdl_metadata@utlists.utexas.edu)
Subject: [tdl_metadata] Suvey Reminder Email Sent

Dear Colleague,

This is a friendly reminder asking you to assist the Texas Digital Library Metadata Working Group in assessing the metadata training needs of Texas Digital Library (www.tdl.org) member institutions and friends by filling out a web-based survey. If you have filled the survey out, thank you! If you have not had a chance to take the survey yet, we would appreciate your clicking on the link below and completing the survey. The deadline to submit responses is Tuesday, February 16th.

Link to survey:

https://www1.baylor.edu/surveys/tdl/metadata_training_needs_assessment.htm

Link to additional information: <http://tinyurl.com/yep2h6g>

Thank you for your time. If you have any further questions, please contact Daniel Alemneh at: daniel.alemneh@unt.edu.

Amanda Harlan,
Metadata & Catalog Librarian,
Baylor University Libraries
One Bear Place, #97148
Waco, TX 76798

Appendix-5: Follow-Up Survey Questions

http://www1.baylor.edu/surveys/tdl/tdl_followup.htm

Page 1 of 1



TDL Metadata Working Group

Metadata Training Needs Assessment - Follow Up

1. If TDL were to offer several options like in-person half-day, in-person all-day, in-person workshop (3 days?), online course, webinar, or distance learning options for the metadata courses would this make the courses more feasible for you to attend or take?

2. When courses in metadata will be offered, what teaching style do you think will be most beneficial to learning the subject? (For example: Group vs. Individual activities? Lecture vs. hands-on learning? Hybrid?)

3. What platforms or formats would you like the training to cover? For example, metadata in IRs, ContentDM Dublin Core metadata, EAD?, etc.

4. Given where your institution is at in terms of implementing digital projects, would you be served better by training that focuses more on management/workflow issues (e.g., how do we make good decisions about metadata for our overall DP environment), or more specific training on particular schemas and tools?

5. Are there any issues or any other aspects of metadata training that we haven't covered that you think should be discussed here?

Submit

Appendix-6: Types of Metadata Training

Table 8: *Types of Metadata Training (1 being least important and 5 most important)*

Course	No.	Five	Four	Three	Two	One	N/A	Mode
General overview of metadata	Course 1	35 (13+20+2)	15 (9+5+1)	23 (15+7+1)	10 (5+1+4)	27 (14+10+3)	0 (0+0+0)	5
Hands on descriptive metadata creation	Course 2	41 (22+16+3)	22 (12+8+2)	21 (11+8+2)	15 (7+6+2)	10 (4+4+2)	1 (0+1+0)	5 (3,5,2)
Introduction to specific Metadata Standards and Application (e.g., DC, METS, etc.)	Course 3	34 (20+9+5)	29 (15+10+4)	27 (13+13+1)	8 (4+4+0)	8 (4+3+1)	4 (0+4+0)	5 (5,5,5)
Intermediate level metadata creation, storage, and management	Course 4	29 (18+7+4)	28 (22+4+2)	19 (7+8+4)	15 (5+10+0)	13 (3+9+1)	6 (1+5+0)	5 (4,2,3)
Advanced metadata management, quality assurances, and interoperability	Course 5	29 (19+6+4)	24 (19+3+2)	20 (9+10+1)	14 (5+8+1)	16 (4+11+1)	7 (0+5+2)	5 (4,1,5)
Tools for Metadata management	Course 6	34 (21+10+3)	35 (24+6+5)	22 (6+15+1)	7 (3+4+0)	8 (2+5+1)	4 (0+3+1)	4 (4,3,4)
Programming for metadata	Course 7	24 (11+8+5)	26 (20+5+1)	22 (10+10+2)	12 (3+8+1)	18 (11+6+1)	8 (1+6+1)	4 (4,3,5)
Other Training Options	Course 8	3 (3+0+0)	3 (3+0+0)	4 (0+3+1)	3 (1+2+0)	11 (4+6+1)	86 (45+32+9)	1 (1,1,1)

Appendix-7: Invitation Email to Follow-up Survey Invitation

From: Harlan, Amanda [mailto:Amanda_Harlan@baylor.edu]
Sent: Monday, April 26, 2010 10:15 AM
To: .
Cc: (tdl_metadata@utlists.utexas.edu)
Subject: [tdl_metadata] Follow up Questionnaire for the Metadata Training Needs Assessment Survey
Importance: High

Dear Colleague,

A couple of months ago you answered a survey on Metadata Training Needs Assessment that was put out by the Texas Digital Library Metadata Working Group, which is part of the Texas Digital Library (www.tdl.org) a consortium dedicated to providing support for online scholarly communications at Texas institutions of higher learning. Our main outcome from this survey was to gather information from Texas academic institutions, libraries, and museums about their metadata needs so that we could create applicable training courses based on participants' knowledge about metadata and digital asset management.

Based on the survey questionnaire responses, we would like to ask you the six follow up questions to support our findings. Please send us your response by this Friday, April 30th.

Link to survey: http://www1.baylor.edu/surveys/tdl/tdl_followup.htm

Again, we would like to thank you for agreeing to participate in this short follow up questionnaire and look forward to receiving your comments regarding the metadata training needs. If you have any questions regarding this study, you may contact Daniel Alemneh at: daniel.alemneh@unt.edu or Amanda Harlan at: Amanda_Harlan@baylor.edu.

TDL Metadata Working Group

Appendix-8: Follow-up response by Institutions' Types

http://www1.baylor.edu/surveys/tld/tld_followup.htm

Table 9: Follow-up response by Institutions' Types

-	Q1	Q2	Q3	Q4	Q5	Q6
Res. No	Your Institution best described as:	If TDL were to offer several options like in-person, half day, workshop, Online...	What teaching style will be most beneficial...	What platforms or formats would you like the training to Cover...	Would you be served better by training that focuses more on management...	Are there any issues or any other aspects of metadata tra...
1	Academic institution	Yes.	Hand-on	DACS or DublinCore	Particular schemas and tools	Small projects.
2	Academic institution	Webinar or in-person all day	Lecture with hands on.	Dublin Core, DSpace harvesting	particular schemas and workflow issues	
3	Academic institution	Yes, I would like to see them as webinars or distance learning first and the in-person ones second.	Group hands-on. Metadata can be complicated enough without actually doing it.	all of the examples	management/workflow issues	
4	Academic institution	online course or webinar	Not lecture. Hands on learning working through real life documentation and processes.	Metadata in DSpace, how to customize for each collections. DC is best for ETDs imho.	work flow management	Extracting data from the ProQuest or Vireo tool and reformatting it in MARC for input into local systems.
5	Academic institution	yes	hybrid lecture and hands-on i tend to like individual activities that are relevant to my institution (perhaps bring my own "problem" to the workshop)	i do not have platform specific needs	specific training	
6	Academic institution	webinar	I would think some lecture and some hands on.	Dublin Core	more specific tools	I think this is adequate coverage
7	Academic institution	Yes. And I prefer in-person all-day.	hands-on learning would be good.	metadata in IRs, METS, MODS, XML and EAD	Both.	Not really.
8	Academic institution	Yes.	Hybrid.	The basics.	Overall decisions for the present, but later will need particulars.	None that I can think of.

-	Q1	Q2	Q3	Q4	Q5	Q6
9	Academic institution	Yes - nice to have options, esp. with staffing considerations, workflow needs, and travel budget	Hybrid with group lecture, and hands-on. Optimally, there would be assistants to help individuals having problems with hands-on exercises.	Metadata in ir, CONTENTdm DC metadata, creating an application profile for the various platforms/ formats and its associated documentation. Not sure about EAD yet, unless it is creating finding aids with EAD. How about a section on harvesting from these platforms to MARC, and back, plus Usage of MarcEdit and OCLC connexion softwares for harvesting.	Need both. Can't really make a correct decision on what kinds of mgmt/workflow issues one would need to make, unless one understands the schema and tools that would be used.	the application profile; harvesting and tools; MARC and non-MARC platforms in relation to metadata mapping/cross-walks; name authority in IR and other non-MARC platforms; discussion of how each of your agencies does its own particular version of metadata applications (in relation to the existing platforms you use) would be helpful -to see actual workflows in existence
10	Academic institution	Anything that would not require more than 1 overnight stay would be best.	Hands-on for reinforcement	METS, MODS, MADS, and tools to create/manipulate the XML	given the size and complexity of the organization, both would be useful, but for different people	available tools for metadata creation and use of digital materials outside of DSpace and ContentDM
11	Academic institution	Yes, a variety of F2F and webinars gives me a chance to office options to the employees	Group activities and hands on always helps me. I think hybrid course are good also	Not sure	Not sure	No
12	Academic institution	Yes, of course more flexible options make it easier to schedule training like this. An online course would probably be the one I'd be most likely to	Hands-on learning, such as actually creating metadata for an item in a certain schema.	DC, METS, PREMIS, and EAD are subjects I'd be interested in. Platforms only if more depth could be achieved through trying	I think the institution is indeed more focused on management and workflow, but because much of the literature is	

-	Q1	Q2	Q3	Q4	Q5	Q6
		attend.		them out, but in the case of things like ContentDM I wonder if it would actually be possible to get that kind of access without having a ContentDM instance?	focused on these issues and think particular schemas and tools would be a more useful subject for me.	
13	Public library	online course	individual activities, lecture	all	both	
14	Academic institution	Yes	Group, combination of lecture and hands on.	Combo, as it seems actual metadata adoption usually requires a blend of different metadata frameworks	Management/Workflow issues	no
15	Academic institution	Either online training or onsite training over 2-3 days would be preferable. Half-days in-person would not be cost-effective.	Hybrid	Dublin Core, EAD, METS, Premis	Management/workflow issues	
16	Academic institution	Yes. Online course and/or webinar is my preference.	For me: Individual activities; Lecture	ContentDM Dublin Core EAD	Management/workflow issues	no
17	Public library	Yes - the more (differently priced) options the better!	Individual activities. Lecture with hands-on exercises built in regularly.	ContentDM Dublin Core metadata, EAD.	Both! We are still new enough to this that tweaks that improve our workflows are most welcome. But we also really need specific training so that more of our staff are up-to-speed.	Not that I can think of.
18	Academic institution	Yes	Lecture w/hands-on, so hybrid...some lecture, some exercises; group would be good, but really only if face-to-face, unless you have some new whiz-bang technology that enables	What would be the difference between metadata in IRs vs. metadata in any other kind of repository? The difference is in the fields used, not in the concepts, IMO. EAD would be	BOTH	Please do not focus on institutional repositories only. If your group lacks expertise in archives or images, please get it from outside. Texas A&M,

-	Q1	Q2	Q3	Q4	Q5	Q6
			group interaction online. Otherwise, individual, but with sharing of results.	good; METS might be helpful, but both in limited amounts.		for example, appears to have little expertise in anything beyond digital repositories, as all their presentations focus on that. It would be really awesome if there were presentations focusing on user research as to what is important in metadata based on user group - for example, librarians may need certain fields, end users others. Thanks for asking.
19	Academic institution	Yes. Although in-person workshops are a preferred method, scheduling and economics make online options attractive. So we would appreciate access to all types of training options.	Hands-on learning is best in my opinion, and group activities are valuable in obtaining different perspectives on solving the same problem, but that's not a really feasible option for online/distance-- or rather I don't like that method when I can't be in the same room with the others.	all of the above	more specific	
20	Public library	Distance learning would be the best option for the Real County Public Library.	Individual learning with hands-on learning.	I am not sure what these mean.	Workflow issues.	Don't know enough information about metadata to answer this question.

-	Q1	Q2	Q3	Q4	Q5	Q6
21	Public library	yes, in-person, all day would be best	hands-on learning	am not familiar with metadata formats, so any would be fine	management/workflow issues	no, not at this time
22	Academic institution	online course or webinar (distance learning options)	hybrid	metadata in IRs and EAD would be most beneficial for this institution at this time	more specific schema, especially the one(s) used in TDL -- but the management/workflow issues would be helpful, too, because we have not worked with anything regarding metadata at all up to now	
23	Academic institution	Yes--online options need to be made available. Participation is still dependent on cost and time demands.	Hybrid--Lecture with hands-on, individual activities with as much time allowed as possible for questions. Participants should be encouraged to bring questions/material from the digital projects with which they are engaged.	Dublin Core metadata	I still feel the need for training on workflow issues, but we are at the point where more specific training within the context of our particular digital projects would be more helpful.	
24	Academic institution	Yes	Group training with some hands-on.	ContentDM	Training on particular schemas and tools.	Not at this time.
25	Other (*School District)	As long as the prices are low-- we don't have much of a budget for training.	Definitely hands-on learning	Dublin Core, EAD	schemas and tools-- we've had a digital project since 2002, although we don't have a lot up yet.	
26	Academic institution	Online or webinar, is preferred. We have a small staff, and travel for any distance or time is not a good option for us.	Hybrid	All of the above	We are members of a consortium of libraries, some of whom have much more sophisticated digital implementation. Our small staff	Not right now, but training may lead to more specific questions regarding our needs.

-	Q1	Q2	Q3	Q4	Q5	Q6
					could still benefit from both kinds of training.	
27	Academic institution	Yes	Hard one to answer--possibly a mixture of both. For example maybe a lecture or webinar followed by an online individual activity. For practical learning I think individual activities might lend itself better to metadata, but as I mentioned above it isn't an easy question to answer.	All the ones you mentioned above	More specific training on particular schemas and tools (management and workflow issues will be addressed by others)	Not at the moment
28	Academic institution	Distance Learning options would be better because we have little travel money. However, my personal preference would be in-person one day particularly Fridays.	Individual activities and hands on learning. Cataloging is a solitary thing for me.	Metadata IRs and Dublin Core	Particular schemas and tools	no
29	Academic institution	Yes.	Individual. Hybrid. Without some kind of lecture first, the hands-on would be hard to do.	All of the ones mentioned.	Particular schema and tools.	
30	Academic institution	Having options is good. Considering budgets at this time, I would lean more toward the online course, webinar, or distance learning options.	A hybrid would be best.	ContentDM and Dublin Core	Specific training	
31	Academic institution	Yes, I prefer to taking online course, webinar or distance learning due to the state-wide cost containment.	Hybrid will be preferred.	any metadata that related to share information among the Texas institutions.	none	none

Appendix-9: All Participating Institutions by Types

Table-10: Participating Institutions by Types (N=110)

No	Academic Institutions (N=56)	Public Libraries (N=43)	Others (N=11)
1	Alamo Colleges, Northeast Lakeview College	Abilene Library Consortium	Austin Independent School District
2	Angelina College Library	Alice Public Library	Baylor Art Department /Allbritton Art Institute
3	Angelo State University, Porter Henderson Library	Blanche K. Werner Public Library	Dallas Municipal Archives
4	Austin Community College	Booker School/Public Library	Dolph Briscoe Center for American History, University of Texas at Austin
5	Baptist University of the Americas	Canyon Area Library	Harris County Archives
6	Baylor University	Canyon Area Library	Harry Ransom Center
7	Bridwell Library, Southern Methodist University.	Carl & Mary Welhausen Library	SPC
8	Cisco College	Castroville Public Library	Texas Medical Center Library
9	Dallas Baptist University	Chambers County Library System	Texas State Library and Archives Commission
10	East Texas Baptist University	Collingsworth Public Library	The Harry Ransom Center
11	Howard Payne University	Crockett County Public Library	UT MD Anderson Cancer Center
12	Instructional Support Services, The University of Texas at El Paso	Dallam-Hartley Counties Library	
13	Kilgore College	Dallas Public Library	
14	Lamar State College-Orange	Deaf Smith County Library	
15	Lamar University - Gray Library	Denton Public Library	
16	McLennan Community College	Dilley Public Library	

No	Academic Institutions (N=56)	Public Libraries (N=43)	Others (N=11)
17	McMurry University	Dimmit County Public Library	
18	Midwestern State University ~ Moffett Library	Fannie Brown Booth Memorial Library	
19	North Central Texas College	Genevieve Miller Hitchcock Public Library	
20	Paul Quinn College	Hemphill County Library	
21	San Antonio College Library	Higgins Public Library	
22	Southwestern University	Houston Area Library System	
23	St. Edward's University	Houston Public Library	
24	St. Philip's College (Alamo Community College District)	Huntsville Public Library	
25	Stephen F. Austin State University	J.H. Wootters Crockett Public Library	
26	TAMU-CS	Jasper Public Library	
27	Tarleton Law Library, UT School of Law	Kimble County Library	
28	Tarrant County College	Lytle Public Library	
29	Texas A&M	Moore Memorial Public Library	
30	Texas A&M University	Murphy Memorial Library	
31	Texas A&M University-Corpus Christi	Nacogdoches Public Library	
32	Texas State University-San Marcos	New Waverly Public Library	
33	Texas State University-San Marcos	Oldham County Public Library	
34	Texas State University-San Marcos	Public Library	
35	Texas Woman's University	Real County Public Library	
36	The University of Texas at Dallas	Rhoads Memorial Library	

No	Academic Institutions (N=56)	Public Libraries (N=43)	Others (N=11)
37	The University of Texas at Dallas	Sherman County Public Library	
38	TTU	Stonewall County Library	
39	Tyler Junior College	Swisher County Library	
40	University of Houston Libraries	Taft Public Library	
41	University of Houston Libraries	Texas Panhandle Library System	
42	University of North Texas Libraries	Universal City Public Library	
43	University of Texas at Brownsville	Yorktown Public Library	
44	University of Texas at Brownsville/Texas Southmost College		
45	University of Texas at San Antonio		
46	University of Texas Medical Branch, Galveston		
47	University of Texas-Pan American		
48	University of the Incarnate Word Mabee Library		
49	UNT Libraries		
50	UT Arlington Library		
51	UT Austin		
52	UT Austin		
53	UTTC		
54	Victoria College/University of Houston-Victoria Library		
55	Walker Memorial Library, Howard Payne University		
56	Weatherford College		

**Appendix-10: TDL Metadata Working Group
Committee members (2010)**



<https://wikis.tdl.org/tdlmetadata/>

- Daniel Alemneh, University of North Texas
- Mingyu Chen, University of Houston
- Jee-Hyun Davis, University of Texas-Austin
- Amanda Harlan, Baylor University
- Jeanne Hazzard, Texas State University
- Holly Mercer, Texas A&M University
- Jason Thomale, Texas Tech University

