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People Profile: Jody Perkins

Editor

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has been written on everything from emerging standards and new applications to research on automated processes, interoperability and measures of quality. Unfortunately there is still relatively little information available that gets at the everyday issues many implementers or potential implementers are likely to face in the field. What follows is based largely on my own experience, the experience of colleagues, what I’ve learned from workshops and to a much lesser extent from an emerging practice based literature.

Since the quality and interoperability of metadata has a direct bearing on access to, and in the case of primary source materials (photographs, manuscripts, raw datasets etc.) comprehension of digitized resources, and since its creation is often the most time-consuming and thus most costly component of a digital library project, it’s critical that anyone proposing such a project have at least a fundamental understanding of what’s involved. When metadata is an afterthought, implementers can be forced into making ad-hoc decisions resulting in poor quality non-interoperable metadata. However, when metadata is part of a thoughtful planning process, obstacles can be anticipated and trade-offs either managed or avoided.

Planning

Metadata creation requires planning because for the most part it is carried out as part of a project and projects vary from one another in ways that can’t always be anticipated. Among the many project variables are the types of collections, hardware, software, required expertise, project team members, metadata creators and the source and extent of funding.

Planning for metadata is only one part of the larger digital project planning process. Project planning typically includes: clarifying the purpose and establishing the goals of the project, identifying stakeholders, planning for scanning and metadata, allocating resources, and designing workflow. Deliverables and criteria for a final evaluation should be specified where possible. All the decisions to follow should be made with project outcomes in mind.

In some cases a metadata specialist may be involved in setting project goals and at other times there will already be established. Even in the case of a metadata specialist it’s necessary to determine whether there is a match between the resources available and the extent to which you will be able to create metadata that complies with current best practices.

Metadata Design

Interpretation and negotiation of many different and at times conflicting standards is often required. One must also remain vigilant about interoperability issues and be sensitive to any unique requirements of the project in question. Compromises are inevitable and knowing when and where to cut corners without sacrificing quality is a vital part of the process. Final decisions will be based on the goals established for a specific project as well as the priorities of your particular institution or department at the time the project is underway.

Metadata design, the way I’ve come to define it, includes the following: an evaluation of project collection(s) and any associated metadata, a review of current standards, a review of other relevant collections, and documentation of decisions related to the selection and implementation of standards. The preparation of a crosswalk may also be required when migrating legacy data to a new schema.

Critical Decision Points — Metadata Planning at the Strategic Level

As a pre-requisite to making many of the smaller decisions that are part of metadata design at the project level other more critical decisions need to be made with regard to interoperability compliance, measures of quality and the breadth and depth of metadata. It’s a good idea to establish a set of minimal requirements that every project must meet. However, a discussion of all the issues that might best be addressed as part of an overall digital library program plan is beyond the scope of this discussion (see Agnew, 2003).

Evaluation of Project Collections

An evaluation of project collections is an important first step in the metadata planning process. It includes a review of representative items as well as any existing metadata or other information sources that could be converted into metadata. A thorough review of this type makes it possible to understand not only the content but also the context of the collection and how it relates to the desired project outcomes. Such an understanding is fundamental to the selection of appropriate content standards, schemas, controlled vocabularies and related value spaces and is also critical in establishing an efficient workflow, selecting project team members and guiding the training of metadata creators. For a more detailed treatment of issues to consider please refer to the collection evaluation checklist at the end of this article.

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