

Community Metadata Strategy Task Force Charge

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A. Background and Governance

HathiTrust relies on member-contributed bibliographic metadata as a key part of HathiTrust's management of content ingest, collection management and preservation, collection analytic capacity, and user discovery and access. It further supports the activities of the HathiTrust Research Center. Bibliographic metadata contributed by members exists within a larger community metadata context and as the collection grows in scale, value, and impact for users, it is time to develop a contemporary strategy for managing member-contributed metadata.

HathiTrust's 2019-2023 Strategic Directions includes the objective, "Address quality issues in the collection and associated metadata" within its strategic theme of Enhance. Metadata quality affects HathiTrust's ability to grow, steward, and make accessible its collections and members' and users' ability to effectively leverage HathiTrust's content for research, teaching and learning.

The Task Force will build on earlier work and synergize ongoing work with HathiTrust metadata. In 2016 the HathiTrust Metadata Policy, Strategy, Use and Sharing Advisory Group (MUSAG) reported the results of "an environmental scan of metadata related services, systems and policies related to the HathiTrust Digital Library for the purpose of understanding metadata issues and identifying gaps relating to record connectivity and policy." This report identified 12 distinct types of metadata in HathiTrust: bibliographic metadata, Copyright Review Management System rights investigation data, print holdings data, rights and source data, object quality metadata, METS data, print status/market availability data, registry of U.S. federal documents records, Collection Builder data, HathiTrust Research Center (HTRC) Workset Builder metadata, HTRC Extracted Features, and other HTRC analytics-generated data. The report identified a wide range of opportunities and improvements.¹

The Metadata Sharing Policy was recently approved providing broad guidance sharing HathiTrust metadata, including member-contributed metadata. The ongoing work of the

¹HathiTrust Metadata: An Environmental Scan. Internal Report prepared by the HathiTrust Metadata Policy, Strategy, Use and Sharing Advisory Group, Kristina Eden, Valerie Glenn, and Angelina Zaytsev. December 2016.

Metadata Sharing Policy Task Force will address sharing policies for bibliographic metadata (among other metadata types) in more detail. The Community Metadata Strategy Task Force will need to monitor and, as needed, engage with the work on the Metadata Sharing Policy Task Force but has a broader charge looking at strategy for member-contributed metadata in light of the broader community metadata ecosystem.

B. Charge

The Community Metadata Strategy Task Force has as its objective the creation of a set of guiding principles and potential priorities for metadata enhancement actions and workflows addressing primarily member-contributed bibliographic metadata deployed by HathiTrust in supporting ingest, management, development, and use of the digital collection. The Task Force will need to promote a shared understanding of the current metadata environment in which member-contributed metadata originates and operates, think beyond existing policies, conventions, or technology infrastructures of HathiTrust. For example, the Task Force can consider the structure, source, and maintenance of master/preferred records in the HathiTrust catalog, including potential partnerships with other entities that have tools and/or infrastructure that HathiTrust could leverage.

The task force will:

- Review HathiTrust's position in the overall metadata ecosystem for libraries and publishing and advise PSC and HathiTrust operations on opportunities and policies concerning bibliographic metadata enhancement. Identify high priority use cases and issues that result from current limitations around enhancing metadata.
- Review current policies for member-contributed bibliographic metadata, and determine which types of metadata are appropriate candidates for enhancement and correction in HathiTrust. Liaise with the community and educate the member community about issues related to metadata enhancement policies for two-way communication on issues related to metadata enhancement of member-contributed metadata.
- Develop a set of guiding principles and if determined appropriate, draft proposed text for member-contributed metadata policies for PSC review.
- Engage units of HathiTrust and partner organizations potentially affected by metadata policies. Leverage staff membership in the group to consult with HathiTrust Operations to assess the implications of proposed guiding principles and the feasibility of potential policy changes.
- Maintain ongoing communication with PSC about the task force's work and progress.

C. Outcomes

- Member engagement with and support for guiding principles for HathiTrust directions for stewarding and managing member-contributed metadata.

- The work should be complete within 18 months resulting in at minimum a set of guiding principles and high priority use cases to guide decision-making.

D. Reporting

Reports to the Program Steering Committee. The chair should prepare quarterly reports for PSC and contribute to PSC's progress reports to the Board of Directors.

E. Membership/Composition

Membership: Recommended by Chair and approved by the PSC. PSC will assist with recruitment of membership from HathiTrust member institutions.

Membership composition:

- Chair: From HathiTrust Member Institution - appointed by PSC
- At least five members from HathiTrust Member Institutions, particularly those with expertise relating to metadata creation and maintenance such as: catalogers and metadata experts, librarians familiar with what users and researchers need from metadata, and staff with expertise and experience regarding current HathiTrust metadata management processes.
- Liaison from PSC
- One or more HathiTrust Staff members with expertise in metadata management from the central staff and one member from the Zephir team at CDL