Workplan WG Cataloguing/Metadata – CCLIP (draft March 2024)

WG Charge

The Cataloging / Metadata working group will focus on developing community guidance on the metadata needs and cataloging workflows among institutions, such as libraries, publishers, content providers, necessary to implement collaborative collections lifecycle activities. Members will provide input on metadata exchange requirements to the Technical Development Lead Team to support the development of CCILP prototype middleware and application specifications, once functionality of the middleware is clarified.

Deliverables

- The WG will contribute to the CCLIP Recommended Practice by drafting the section on metadata requirements.
- The WG will provide guidance on processes for metadata gathering, updating, and exchange among institutional partners as described above. It will recommend required metadata schemas (together with Collections Development/Selection and Acquisitions working groups) and interoperability models or frameworks.
- The WG will define the workflow processes on establishing consistent practice among cooperative partners.
- The WG will provide input on Recommended Functional metadata requirements for prototype middleware (to be determined) through the description of User stories.
- The WG will explore the data ingest needs of individual institutions and the engagement of those users in cooperative systems (for example consortia), as well as the metadata needs of the other CCLIP working groups' user stories (such as selection, acquisitions, or analytics requirements). These user stories will focus in particular on the needs of CCLIP personas such as selectors, acquisitions librarians, library patrons, and library management, who require accurate and consistent data to support their work. These users are expected to receive or use various types of relevant (including administrative) data from multiple sources such as aggregators, publishers and other partner institutions, then share it within their user communities. It will work with the CCLP Technical Prototype Development Team.

Short written summaries of progress ready to be shared with the Steering Committee and on the project website are expected once a month.

Scope

Working regularly with other CCLIP working groups, the Cataloging / Metadata Working Group will prepare CCLIP user stories that focus on cataloging activities and metadata needs in the collaborative collection development ecosystem.

Members will explore existing workflows for creating/modifying records as well as details of associated metadata exchange protocols that support maintenance of information systems.

They will also work to identify functionality gaps and user needs for metadata workers in a collaborative environment.

Timeline

The WG will operate from January 2024 to December 2024.

Actions	Dates
Appointment of WG	January 2024
Approval of Charge and initial Work Plan	March 2024
Completion of Data Gathering*	June 2024
Completion of User Stories	August 2024
Development of Initial Draft	July-September 2024
Review of draft	October 2024
Completion of contributed section Draft	November 2024

*examination of related standards, questionnaires, interviews, desk research

Interactions with other CCLIP WGs

The co-chairs will attend the co-chairs-PIs monthly meetings.

Responsibilities within the WG

- Outreach/Communications (webinars, quarterly update on the status of the project and a monthly summary document): Millie Fullmer, Graham Dethmers (backup)
- Liaison with other WGs: Gaëlle Béquet, Jeannette Norris
- Liaison with the CCLP prototype development team (on hold): Lisa McColl