

**The AMeGA Project:
Recommended Functionalities for Automatic Metadata Generation Applications
(for Section 4.2, LC Bibliographic Control Action Plan)**

1. Status Report Summary

Work on the AMeGA project is progressing well. The progress follows the Activity Plan (http://ils.unc.edu/mrc/amega_activity.htm) outlined in the project proposal (see also the Gantt chart available at this link). A summary list of accomplishments and important developments follows:

- The project's Web site has been revised and now links to the University of North Carolina's (UNC), School of Information and Library Science (SILS) Center for <Metadata> Research © Website. The new AMeGA Website address is: <http://ils.unc.edu/mrc/amega.htm>. (The SILS Center for <Metadata> Research is a new entity that is being developed under my direction.)
- The project listserv for AMeGA MGTF members and staff was launched after the first quarterly report was submitted. This listserv has been useful for disseminating project information and gathering feedback on the survey. The listserv's address is: Amega@listserv.unc.edu.
- A survey has been designed to gather feedback from metadata professionals, and other persons interested in metadata generation, about functionalities desired in automatic metadata generation applications.
- All survey documentation has been submitted to UNC's Institutional Review Board, in accordance with University policies, to ensure that subjects participating in the study are not at risk, that their participation will remain confidential, and that we will uphold high-standard research practices.
- Investigative tasks specific to OPACs and automatic metadata generation applications continue.
- The AMeGA project will be one of two projects highlighted at the American Library Association's Annual Conference in the ALCTS CCS Cataloging & Classification Research Discussion Group.

- Three more people have joined the Metadata Generation Task Force (MGTF) and a couple of staff changes have taken place, with project students graduating.

Several items listed here are elaborated on in the following pages to provide more context.

2. Survey Design and Revision

A draft survey, designed to gather feedback from metadata professionals, and other persons interested in metadata generation, was made accessible to MGTF members on April 29, 2004. The survey will gather data on participant's cataloging/metadata experience, their perceptions of automatic techniques for metadata creation, and the functionalities they would like supported in automatic metadata generation applications. The survey was designed by Jane Greenberg and doctoral student, Abe Crystal. The survey was created with software designed by Surveymonkey.com. We have tested this software and are quite pleased with how data can be gathered and exported into an Excel spreadsheet for data analysis. MGTF members had approximately a three to four week period in May to evaluate the survey and provide feedback. Six MGTF members provided very useful feedback, which was incorporated into the revised survey.

The survey was revised by doctoral student, Kristina Spurgin, and Jane Greenberg. The revised survey includes the following five sections: 1. Introduction, 2. Participant Information, 3. Metadata/Cataloging Experience, 4. Automatic Dublin Core Metadata Generation, 5. General Automatic Metadata Generation. The revised survey will be made accessible to MGTF members, today, Monday, June 21, 2004. We will seek MGTF members' approval of the revisions. Our goal is to launch the survey by the end of June 2004. We are also currently piloting the revised survey; four people, with different levels of cataloging/metadata experience, have been recruited to partake in the pilot test, and three people have already participated in the pilot test and given us feedback. (I will summarize this information later today, or tomorrow.)

3. ALA and the AMeGA Project

The AMeGA project will be one of two metadata generation projects highlighted at the American Library Association's Annual Conference in the ALCTS CCS Cataloging & Classification Research Discussion Group (CCRDG). I have been asked to lead this discussion group's session, and will provide an overview of the Metadata Generation Research (MGR) project (http://www.ils.unc.edu/mrc/mgr_index.htm) (a collaboration

between UNC/SILS and the National Institute of Environmental Health Sciences) and the AMeGA project. The CCRDG session will begin with a short business meeting; I will then present two metadata generation projects and facilitate an open discussion. This is an excellent opportunity to promote the AMeGA project within the ALA community and gather feedback from ALA colleagues. Amanda Wilson, previously an AMeGA staff member and now a member of the MGTF, will serve as a recorder for the session and share notes via the Amega listserv.

4. Online Catalogs and Automatic Metadata Generation Functionalities

The online catalog/automatic metadata generation functionality analysis has continued over the second quarter. Amanda Wilson visited the State Archives in Raleigh, N.C., in May, to examine, first hand, OPAC functionalities in the ENCompass Solutions system. The visit was somewhat, although not entirely, successful, as the State Archives cannot afford to pay for the functionalities that we wanted to evaluate. Amanda developed a protocol for future evaluation of systems that have implemented automatic or semi-automatic functionalities. The cost issue that Amanda identified, while not central to the goals of the AMeGA project, is an important consideration for the larger objective of developing superior automatic metadata generation applications and invites interesting questions about Requests for Proposals (RFPs) for such tools.

Kristina Spurgin, a doctoral student who has recently joined the project, is continuing the investigation of OPAC functionalities and will be visiting one or two other institutions in the coming weeks. One possibility is Wake University.

We are working on gaining access to LC's Cataloger's Desk Top, and other tools distributed by LC's Cataloging Distribution Office. This will allow us to consider how these tools could fit into automatic metadata generation applications in the future.

5. Metadata Generation Task Force (MGTF)

The MGTF now includes eleven members now (seven professional librarians, one vendor/software developer, one researcher from OCLC, and two LC representatives). A member of the UNC library community may join the task force in the coming month.

The three new MGTF members are:

- John D. Byrum, Jr., Chief, Regional & Cooperative Cataloging Division, who is leading the Library of Congress Bibliographic Control Action Plan efforts. John is

serving as an LC contact for work related to Section, 4.2 of this plan along with David Williamson.

- W. Davenport (Dav) Robertson, Library Director, Library & Information Services Branch, National Institute of Environmental Health Sciences (NIEHS). Dav leads the NIEHS metadata initiative and has been a research partner on the MGR (Metadata Generation Research) project.
- Amanda Wilson, Metadata Librarian at Ohio State University. Amanda Wilson was an AMeGA project staff members, and graduated from UNC/SILS in May.

The MGTF has been responsive to the survey design, as indicated above. The MGTF will be asked to review the survey revisions over the next week, so this part of the AMeGA research can be launched. MGTF members will recruit at least ten persons each from their respective institutions to complete the official survey once it is implemented.

6. Project Staff

Two new staff members have joined the project, and one person has left the project. New staff members are:

- Kristina Spurgin, a SILS doctoral student. Kristina's areas of study include personal information management, organization of information, blogging, and the application of metadata in these areas. Kristina has worked a great deal on the survey, assisted with the project's new Web design, and is forging ahead on the investigation of OPAC features desirable for automatic metadata generation applications.
- Michelle Mascaro, a recent SILS graduate. Michelle graduated from UNC/SILS in May and has been working as a Metadata Research Assistant for the MGR project for the last two years and the AMeGA project for the last two months. Michelle has conducted background research for the project, assisted with the project's new Web design, and she is currently assisting with piloting efforts of the AMeGA survey. Michelle will be leaving the AMeGA project at the end of June to take a position as a professional cataloger at Utah State University.

Other staff news: Michelle Cronquist has left the project. Michelle graduated from UNC/SILS this past May and has taken a position as a professional cataloger at Northwestern University's Music Library. Abe Crystal is still on the project, although he has not been

active these last two months (May and June) due to other summer commitments. Abe will likely be involved more after the survey data collection is complete. All of the students have made important contributions to the project. It's likely that another student will join the project staff in late August.

7. Next Steps

Next steps include the following:

- Complete pilot testing of the survey.
- Review MGTF members' feedback on the revised survey.
- Make changes to survey based on pilot testing and MGTF members feedback, seek MGTF members approval of the revised survey, and officially launch the survey.
- Continue with the investigative tasks specific to OPACs and automatic and semi-automatic metadata generation functionalities.
- Create an outline for the final report.

This concludes the Second Quarterly Report for the AMeGA project. Please let me know if you have any questions or comments.

Respectfully Submitted by Jane Greenberg.

//signed jg

CC: MGTF members and Project Staff