

**Pathways meeting
October 18, 2006
Washington, DC**

NSF

NSDL Program Officer Lee Zia reported that the NSF budget overall remains in good shape. He is very pleased that Dave McArthur has been able to stay in association with NSF and NSDL, as a consultant. DUE has a new Assistant Director in Cora Merrick, who is a very good addition to NSF.

NSDL is a real nexus now. The challenge is how to tell the aggregated story about NSDL. Lee noted that the agenda is focused on three inter-related items: 1) metadata issues; 2) community sign on; and 3) web metrics and Omniture implementation. These all have unique challenges associated with them, but working these out is a valuable effort and will help to tell the NSDL story: teasing out the differences between use and usage; telling this story via both data and anecdotes conveys the value of NSDL to NSF.

NSDL CI - Opening remarks

Executive Director Kaye Howe introduced Policy Committee Chair Martin Halbert, who participated in a recent symposium at Emory University on sustainability. Martin extended an invitation to Pathways PIs for submissions of observations on sustainability issues.

Kate Wittenberg introduced Michael Jensen, of National Academies Press. Michael will be working with Columbia CI in the coming year, consulting on knowledge discovery tools and services. Michael will have a brief presentation later in the meeting. Susan Van Gundy will provide an update on outreach and communications strategies; Karen Henry will lead a discussion on metadata issues; and Kate, David Millman, Rob Lane and Sarah Giersch will lead discussions on community sign on.

Kaye reported on three supplemental NSDL grants by NSF to: Syracuse (CAT tool development), Jes & Co. (ASN database), and Teachers' Domain (API development for ed standards protocols). All of these focus on some aspect of education standards work; a working group has been formed with representatives from each of these grants for coordination of this work, and Karen Henry of CI is participating in this group, to facilitate integration of this work with NSDL.

Outreach and Communications – Susan Van Gundy

Susan gave a brief presentation about outreach and communications coordination that she, Carol Minton Morris, and Mike Luby have collaborated on, driven by common themes evident throughout outreach, communication, marketing, and partnership building efforts for NSDL. A full description of the recommended strategies is contained in the document [2007 Outreach and Communications Strategic Campaigns](#). The working group is recommending the notion of outreach campaigns, with the dual goals of increasing usage and strengthening the NSDL Network, of which Pathways are a primary element. The campaign model provides a common focal point for the variety of activities in NSDL, and provides a structure for activities that can be accomplished within a set timeframe, enabling analysis of effectiveness, and adjustment of strategies. Potential campaigns include:

- NSDL at the Point of Need (e.g. toolbar dissemination, library, district and state website links to NSDL)
- Usage Stories and Statistics (research and survey data, vignette collection and dissemination – telling the NSDL story)

- NSDL in Web 2.0 and Social Media Spaces (RSS, online media spaces, podcasting, etc.)
- Bundled Tools and Services (to state departments of education; university systems)
- Shortcuts to Resources (meeting particular needs)
- Building Awareness at NSF (strengthening knowledge of NSDL throughout research directorates and opportunities to collaborate with NSF's Office of Legislative and Public Affairs)
- Building the NSDL Brand (best practices for branding to all NSDL-funded projects)

Susan also summarized [Draft Recommendations for NSDL Pathways Co-Branding](#). These provide some minimum guidelines for consistency, common language for building awareness of NSDL and Pathways. Included are recommendations for use of an NSDL Pathways Partner logo (TBD), and a short standard paragraph on a site's About page or Partners page that describes the Pathway-NSDL relationship in a general way, as well as other possibilities. Susan will follow up with each individual Pathway to address unique challenges. These minimum guidelines are intended to help showcase the richness of the partnership, web portals, and print materials that constitute NSDL.

Other Updates

Karen Henry summarized the results of the [tools and services survey](#) that was requested of Pathways after the August meeting. There is still some input to receive from PWs that will be incorporated, but it is an impressive array of services that enable cataloging, personalization services, tagging, ed standards work. Next step will be to finalize the survey and provide to all PW projects. Some tools and services are in-house products, some are commercial, some are open-source. It was suggested that it would be helpful to re-sort the information by tool or service type, rather than by particular project.

Dean Krafft reported progress on the *NSDL Data Repository* implementation – some hardware setup issues are in process and should be worked out within several weeks. Development of Expert Voices and OnRamp are also proceeding. Expert Voices is nearing a beta release point.

Kate Wittenberg reported on plans for hiring an Editor-in-Chief for NSDL, to head up collection building activities (transfer of librarian position from Cornell to Columbia). The position will reside at Columbia University and will also work closely with publishers. The EIC will also work on Intellectual Property (IP) and copyright issues, help develop minimum copyright guidelines, FAQs, requests for re-publication – a variety of issues for which basic templates and guidelines will be helpful. All candidates under consideration have considerable library and/or publishing background.

Metadata recommendations

Karen Henry provided an introduction for discussion of the [Proposal to CI and Pathways Regarding Metadata](#) paper by Susan Jesuroga (prevented by illness from attending the meeting). Coming to agreement about key field recommendations and proposing a process/workflow for going forward with these issues will be a key accomplishment. Previous discussions on the email list and within PW calls covered the grade level/education level, and were valuable discussions. Karen will follow up with Diane Hillman and Stuart Sutton on the status of their Metadata registry project, which is designed to support use and re-use of controlled vocabularies (*Note as of Nov. 6, 2006: a description and link to the [NSDL Registry](#) project is featured on nsdl.org from the [NSDL Community page](#), both as a featured resource, and under *Services and Tools* and *Library Operations*).*

Persistence and maintenance; developing/using a common licensing framework (Creative Commons); provision of simple contact information for collections; development of crosswalks—all of these issues are interrelated and have multiple dependencies. The most important activity will be to identify the most important fields and agree on controlled vocabularies for those. Previous work done by standing committees (Content, Evaluation, Technical) will also help inform these processes to improve user search and browse on NSDL, and provide better access to resources.

Wide discussion followed on uses of metadata in the NDR: some PWs would like to use metadata content from other PW collections, and would want to do that in a granularity suitable to their own collections. Highly granular metadata, specific to the PW that developed it, is an indicator of quality to that PW's audience. Additional discussion centered around the use of controlled vocabularies, user-centered design, and most productive ways to proceed.

There was general agreement to:

- Develop best practices – Define minimum controlled vocabs for selected metadata as recommended best practice
- Consistent user experience as an underlying principle
- Form one working group at a time, for each field
- Identify key fields, prioritize a short list (informed by SJ recommendations):
 - Grade/educational level
 - Audience/role – define differences
 - Learning resource type – start with qualified DC and IEEE LOM
 - Subject
- Link to identified/recommended controlled vocabs

Considerations that will inform this work are:

- Issues of scale – consider new kinds of metadata such as folksonomy tagging; utilize balance of formal and informal metadata
- Understand the roles of metadata
 - For search
 - For browse
 - Help users comprehend use of resources
 - Value of controlled vocabs is in the protocols underneath; the services provided; managing the transition between the developer world and the user world
- User-centered design; what are the tasks teachers are looking to support by library use?
- Distinction between how resources are classified vs. how users use. Classification process helps to build user services. User interface can include wider controlled vocabs
- Perfect is the enemy of good!

Community Sign On

Sarah Giersch reported on work done by the Evaluation working group to identify registration elements currently in use among PWs. Process used was to visit every log-in/registration site among PWs. Registration practices have implications for PWs and NSDL privacy policies as well as types of controlled vocabs in use for registration, which are potentially related to controlled vocabs for some metadata fields. Issues discussed included:

- Potential IRB (institutional review board) issues within specific institutions – it is incumbent on each project to clear IRB with their respective institutions

- [Privacy policy recommendations to the MOU](#) contains helpful language for both Omniture implementation as well as privacy policy revision, COPPA (Child Online Privacy and Protection Act) recommendations
- Suggestion: if a metadata working group on subject results in high level discipline recommendations – add that to Sarah's basic set of registration elements
- COPPA issue – does this mean that under-13 cannot use community sign on? This is a policy issue/decision

Rob Lane and David Millman summarized CSO work within the projects. Rob reiterated that the primary barrier to implementation is not technical. This is not easy or trivial, but is do-able. The largest hurdle is to get from the technical to actual implementation (e.g., incorporating CSO functionality into the workflow of PWs sites), because it involves larger issues like privacy policy development/revision, and decision-making at higher levels. Example: a new user to a PW site – may be authenticated, but you have no more information about them. Decisions must be made re: collecting/requesting more information, or will information only be requested at need. Affects site flow, set-up of new and existing pages. This level of engagement is where slow-downs can occur, and where a final push is often needed. These are social and policy-related issues.

- Privacy - what constitutes a third party? This relates to some privacy policy statements about not sharing a user's email address with third parties.
- Coming to some agreement about user attributes (as related to the audience / role field from the Metadata Recommendations section above) would be helpful
- Vocabularies – input by proposed metadata working group(s) very important; definite overlap (define distinctions - different set of requirements)
- Understand the parameters of use, attributes of registration (alignment with the kinds of tools/services Karen previously detailed: creation of personalized services)
- Overlap with Policy Committee responsibilities – aspects of the MOU that should be formal NSDL policies
- CSO is a priority – recommend every PW PI set an appointment with Rob Lane
- Explore reporting possibilities that PWs already do with their registration data; considering tracking users from across sites, across the federation
- Other reasons for registration, e.g. to provide evaluation data for NSF (project reporting) in conjunction with Omniture data
- Many benefits to agreeing on a basic set of data/info from users
- Not implementing CSO is a built-in *disincentive* to NSDL

National Academies Press

Michael Jensen of National Academies Press reported on knowledge discovery tools and work done at NAP using lexical discovery, linguistic navigation, thematic clustering; uses lexical filtering using two term phrases. Michael noted challenges for NSDL: it is both big and little; full text plus abstract only; general and specialized; provides interconnected as well as orphaned resources; is both expository as well as 'cookbook'; both open, and gated.

"The secret to success is to fail, and fail, and fail again,
But less, and less, and less..."

The meeting closed with agreement to meet next summer on Wednesday and Thursday, August 1-2, 2007, in Boulder.