

**Turnaround document:  
metadata workshop  
presentation**

Educating archivists and their constituencies  
State Archives Department  
Minnesota Historical Society  
17 October 2001

Enclosed you will find the turnaround document for the Educating Archivists and their Constituencies meeting in Indianapolis, 17 October 2001. This document encompasses the discussion concerning the draft of the metadata workshop, the workshop's pre- and post-course materials, and the next steps for the project.

You will notice that there are incomplete sentences and paraphrasing throughout the document. This is not a perfect document, nor has it been edited to perfection. The document is not meant to be a complete transcription of the meeting, rather the goal is to reach consensus among the project partners on our understanding of the meeting, and proposals for revisions of the metadata workshop.

Please read the document and make any edits and additions as you see fit. If we receive significant edits and additions to the document, we will send you a final copy of the turnaround document for your approval. If we receive only minor changes, we will add the document to the project web site  
< <http://www.mnhs.org/preserve/records/edarchivists.html> > and notify you when it has been posted.

When editing the document, it will be helpful if you use the "Track Changes" function in Microsoft Word. Then simply save and rename the file, so that we know who has made the changes, and return it to us via e-mail.

Please return your edits and additions to us no later than **31 October 2001**. We promise to have the document posted on the project web site by 7 November 2001.

## Meeting Attendees

Charlie Arp (CA)  
John Churchman (JC)  
Fynnette Eaton (FE)  
Bob Horton (BH)  
Jennifer Johnson (JJ)  
Richard Marciano (RM)  
Glen McAninch (GM)  
Charles Robb (CR)  
Shawn Rounds (SR)  
Judy Walker (JW)

# **Educating Archivists and their Constituencies: Project Partners Meeting 17 October 2001**

## **Location:**

Boardroom, Indiana Historical Society, 450 West Ohio Street, Indianapolis.

## **Agenda:**

8:30 - 8:45 – Gather

### Welcome

- Why we're here
- Housekeeping items
- Structure of the day
- Project team's workshop approach

### Metadata Workshop "Chalk Talk"

- Informal run-through of the workshop materials (slides, patten, etc.)

### Metadata Pre-Course and Post-Course

- Invitation, follow-up e-mails, materials

### Next Steps / Future Plans

- Metadata Workshop
- XML Workshop
- Metadata branding

5:00 – Adjourn

**Note:** There will be breaks throughout the day as needed including a one-hour lunch period.

## Opening Remarks - Bob Horton

Meeting started at 8:45 a.m.

Thanks to Indiana Historical Society for hosting the meeting.

Housekeeping items, structure of the day: chalk-talk format, informal, please interrupt with questions and comments.

Why we're here: education for electronic records is important. Focus on metadata and XML – tools that anyone can use and probably will/should use in the future. Metadata to describe, evaluate, locate, manage information; XML to format and to share information. Workshops will educate archivists and be used as a tool by archivists themselves to reach others. Re-cap of grant proposal philosophy.

Prior meeting of partners last March. Worked out directions and goals for the project. MHS staff have moved forward with those ideas (and added more along the way) and worked up a draft metadata workshop, which will be presented today.

Started by learning how to conduct adult learning sessions. Contracted with Advanced Strategies, Inc. (ASI) of Atlanta, Georgia, which does a lot of information technology education with Minnesota government entities. ASI designed a course specifically for us dealing with course design and delivery. Project team has adopted ASI's approach as well as the "look" of its products. ASI will also "coach" us through the next phase of the workshop's development towards finalization. Approach centered around spiral approach – start at high level and move to more detail, repeating information and adding more as the course goes on. Interaction with/between participants is encouraged. At end, want community of participants where everyone has the same foundation and understanding.

Course does not exist in isolation. Pre-course and post-course materials as well. All three components address short- and long-term needs of participants.

All project partners have copies of workshop slides – a sort of course book. Instructors' course materials consist of slides and accompanying patten. Easily customizable to meet individual needs, for instance, by inserting a unit on a local metadata standard (GILS, audio materials, etc.). Structured enough to be widely adopted, but flexible because everyone's environment is unique.

Jennifer will walk us through the workshop; Shawn through pre- and post-course materials.

GM: What sort of environment are we assuming this will be given in (online? equipment? etc.)?

BH: Presenters will only need laptop, Microsoft Word, and data projector as minimal technological investment. Also assuming that the workshops will be done in person since that helps build communities and increase potential for partnerships and collaboration. Online demands greater resources in terms of times and money, online raises greater expectations in terms of look and feel.

GM: Exercises done on computer?

BH: No. Mastery in one day is not possible. Workshop is to get people talking, provide familiarity with terms, concepts, etc. If the metadata workshop template seems to work, will use same sort of set-up for XML.

GM: Will there be other formats for the workshop?

BH: This is the one that seems to work well and this is the format that the project team will move forward with. But still flexible.

RM: So not the Isogen approach?

BH: Isogen is a Minneapolis company that offered to do the XML workshop for us, but we have not adopted any of its approaches.

CA: Are both audiences (archivists and constituencies) now combined into one workshop (from what was originally proposed in March)?

BH: Assuming spiral approach works, everyone can benefit from the same workshop. Benefits of bringing different groups together in the same room. Two separate workshops would be too complicated and cumbersome.

RM: What kind of feedback from other test groups?

BH: It was tested in-house at MHS. Was met favorably, but now we need outside input from this group. Looking for comments on content, format, look and feel – anything. Break in at any point as we go along.

## **Metadata workshop presentation - general comments and course notes**

In order to better understand the following comments and references to specific pages of the workshop handouts, you may want to have the materials you received either at the meeting or by e-mail available as you proceed through the next section of the turnaround document.

From discussion on Unit 6:

**REPLACE** throughout slides: “sustainable electronic records program,” with “sustainable information management program.”

### **Introduction Unit**

RM: How about a graphic illustrating the spiral approach? Could repeat it/build on it at each iteration.

FE: “Electronic” records versus “digital records” – important distinction to make? Should this issue be placed to the side?

BH: Point to address/explain as we move along. Coming from the archival perspective.

FE: Need to be aware that will be used by both government and non-government in considering course wording.

FE: How about: “Tell us what’s in your inbox” to get at what people actually do.

GM: Is the introduction sheet out of order in the course? They may not know what metadata is, for example.

JJ: That’s ok. This is just to get them talking and thinking. Not a teaching tool, just an introduction.

GM: Item three (“Who are the principal groups...”) better worded on slide than in self-evaluation.

### **Unit 1**

FE: What is the “new approach?”

JJ: Metadata. Could maybe change to “new tool” or “key strategy” or something else.

SR: Have actual old media samples (tape, different sized floppies, punch card, etc.) to hold up when talking about how the world has changed.

CA: Add in bit about changing expectations in terms of immediacy, etc. Drive for efficiency in terms of pervasiveness of computers.

GM: Ask for examples on how their world has changed.

### **I-3**

CR: Could add in own definition tweaking and examples to customize this content.

BH: Here trying to be as broad as possible. A first iteration of spiral.

GM: Need to discuss what a “record” is?

BH: People can discuss this through the exercise.

GM: What part of “database” is a record?

BH: Any or all, in theory. People need to define it for themselves and there’s no need to get into these nuances at this point in the course.

Spell out “Portable Document Format” files

### **I-4**

CA: Change “big deal” to “important” or “significant.”

GM: Change “here to stay” to something else – suggests permanence right now.

CA: What is the pace at this point? Need more examples, etc. Need to reach IT folks here.

JW: This is the place to scare people.

FE: Add in networks to bullet on information systems, storage media. Say electronic recordkeeping is here to stay.

JC/RM: At this point, as a teaser, explain that the problems with managing electronic records, though serious, may be resolved using metadata and XML.

CR: Have some problem with “world” – what world?

CR: Need to keep in mind that to IT people, business processes have changed are what’s important to them, and these may not represent problems to them. Need to get the importance across to them here.

BH: Focus on how we do business in terms of examples?

JW: Note at end that we MUST manage electronic records. Things HAVE changed for us and it's not just enough to do things the old way.

BH: Is sustainable electronic records program idea ok? Is this workable terminology? Want to get away from the idea of one-size-fits-all.

FE: Can shift emphasis for different audiences.

**I-7** remove "new approach"

**I-8** remove "here to stay"

## **Unit 2**

Add some persuasive element here - why everyone should care about and use metadata.

### **II-4**

JW: How about some examples that aren't library oriented? Like an index to files in a box? Others?

JC: Before exercises, ask them to pull out drivers license and ask about what the metadata is, to make this more universal.

### **II-8**

JC: Maybe list some specific examples of how metadata is used, helps, etc. Tell them a story about a particular agency to make it more personal and alive.

FE: Interlibrary loan example for finding records.

JW: Librarians and archivists have traditionally been concerned with metadata, but now others have to be involved as well. We know how to do it and we can help others, but we can't do it alone.

FE: The unit is very archives-oriented.

BH: But can flesh out with examples to reach IT people as well.

## **Unit 3**

Archivists and librarians have done this in the traditional world, but now others must be involved in a cooperative environment. Must have collaboration to be successful.

CR: Is it necessary to discuss this in terms of the Records Continuum? Aren't people still unfamiliar with these ideas, especially IT people?

FE: What about business models idea where we have to determine at what points to capture information?

BH: How about putting it in terms of business processes?

CA: Go back to "The world has changed" and link to Minnesota's Trustworthy Information Systems methodology and with concepts of reliability and authenticity.

GM: Might want to pull in what we said before about the uses of metadata.

JW: What about statistics on the growth of the web? Add in graphic to highlight this somewhere in the course.

**III-3** and **III-4** DELETE diagrams and drop explicit ideas of Records Life Cycle and Records Continuum.

### **III-5**

Change to "Letter / Memo"

BH: Perhaps revise slide and/or patten to better reference business processes as well as archival/library.

Add in course catalogs (just in patten?) and audio examples.

### **III-7**

FE: What about associated transmission information, like routing information. Important for federal agencies.

RM: Example of Usenet e-mail message e-mail – list of required fields. And listservs' requirements. He will pass along information to project team.

### **III-8**

Thinking about an online RFP as an example.

FE: Or a collections management system.

JC: There are layers. An online purchase order would have its own set of metadata and the web page it's on would as well.

FE: Put definitions of "evaluation," "description," and "discovery" on paper for future reference.

GM: What is the purpose of the exercises?

JJ: For them to come up with what the metadata is and start discussion. List would be refined later in the course.

### **III-10**

Change topics into sentences on this slide and following. Consider using references to business practices/outcomes, possible reference to data sharing and enterprise architectures.

### **III-11**

FE: Note that individuals are now responsible for their own files as opposed to past (secretaries, etc.). We're all recordkeepers now.

### **III-12**

Change "reporting" to "accountability."  
Add examples for each.

### **III-14**

RM: Maybe mention GIS metadata earlier and bring in examples since people may not be familiar with it.

### **III-15**

GM: What's the difference between a standard and a tool? Maybe say "markup language" as a tool and add XML as a standard.

Remove all references to Records Continuum and Records Life Cycle throughout course.

CA: Flesh out idea of legal mandates. Include audit trails as an example.

JC: Perhaps interview someone in the audience pool ahead of time to get a sense of what examples would resonate with that particular group. Groundwork done before workshop.

JW: Have to sell this all harder – here's how this will help you, hit it all harder and earlier on. What kind of problems do you have that metadata can solve? Finding files? Etc.

## **Unit 4**

**IV-2** Add "Webmaster" and "System User."

OR

Delete slide entirely and as exercise talk about different types of users. Bring up this slide's information at later points.

CR: What about those creating information?

Use phrasing "Users include...." rather than "Used by...."

**IV-5** add systems developers, auditors as users.

**IV-6** add data administrators, business analysts, planners, auditors as users.

**IV-7** Put in why records creators, IT, etc. should care (maybe add in business case from Minnesota Recordkeeping Metadata Study Committee work).

**IV-8**

JC: Where and by whom is the web page metadata created and stored? (If web masters are going to be told that they have to add metadata to their web pages, they will need to be given good reasons for doing so (like making searches easier and more precise).

BH: Page creators need to be aware of what metadata requirements.

**IV-9**

FE: Since unfamiliar, perhaps examples of how used.

GM: Perhaps say something about how at this point in time (after September 11<sup>th</sup> events), GIS systems are being re-considered about how much information they make available to the public.

**IV-10** remove “Records Continuum.”

**IV-11** Drop first section.

Change “Archivists are” to “We all (archivists, IT, etc.) need to be....”

Repeat spiral again and sustainable electronic records program – we all need to work together.

GM: For all examples, show where both IT and archivists are concerned.

**UNIT 5**

**V-1** drop archivists reference; change to be more inclusive of all people.

**V-2**

CA: Need to mention transactional records – need for trustworthiness (authenticity and reliability).

**V-4**

BH: Will need to ask ourselves which elements are important to non-archivists and why.

### **V-5**

BH: Be sure to discuss those elements of interest to non-archivists (use Minnesota real-life examples) and points of intersection behind archivists/records managers/IT. Stress that it's a lowest-common-denominator set, but flexible enough to meet agencies' particular needs.

### **V-6**

Can "requirements" be non-mandatory? Check phrasing at bottom.

CA: Maybe go from general to specific discussions rather than the other way around – from DoD to Michigan to Minnesota.

**V-8** Rephrase exercise question something like: "Let's talk about your situation." Then lead with more questions.

**V-9** Not just archivists, but also IT and others.

### **V-12**

Under Inktomi bullet, note on page that it is optimized for DC.  
Stress benefits for archivists as well as others (IT, records managers, public, etc.). Might bring up issue of where metadata is stored here (e.g., in web page header, separate repository).

**V-14** rephrase question.

**V-15** repeat spiral once more – sustainable electronic records program again in terms of tools, standards.

Need more emphasis on how access metadata facilitates USE of records.

GM: Transactional examples of recordkeeping.

BH: Unit 5 is customizable to reflect local practices, standards, projects, etc.

## **Unit 6**

BH: This unit is particularly customizable to reflect local practices, standards, projects, etc.

**VI-2** metadata also fits into the "standards" slot.

**VI-4** bullet points need to be more detailed and stand-alone from patter.

BH: Would like to raise an alternative to the description as laid out right now. Maybe look at what didn't work (like Ohio GILS for Minnesota use) and why; then turn around

and say what has worked (recordkeeping metadata) and why. Hook for IT people would be partnerships – we all have to work together to meet our respective business needs in a collaborative approach.

CA/SR: Why should IT people care about a sustainable electronic records program? In this unit, we'll lose the IT people unless it all ties together for them too. Perhaps much earlier on would need to address how a sustainable electronic records program meets the needs of non-archivists too. Need to keep in mind this is not only for archivists

JW: But IT people want to be talked to in their own language and terms.

FE: We do want the two communities to talk together as a goal.

BH: Perhaps say “digital information” and focus more on business practices. Fewer references to archivists and records managers and more emphasis on “partners.” Put more persuasion up front.

CR: Maybe not “sustainable electronic records program,” but instead “sustainable information management program.”

JC: What about others besides IT people?

**VI-6** tools (e.g., markup languages) instead of XML reference.

**VI-7** rephrase exercise question to something like “what benefits does metadata carry for you?” Or emphasize thinking about actual implementation of a metadata standard and practice.

JW: Are we going to cover implementation, how to take standards and make it actually work? People want to know how to actually do it.

BH: Probably can't get too detailed beyond the program equation because every case is different.

FE: What do we want people to go and do after the workshop?

JW: Maybe put in an exercise about implementation?

BH: Discussion just before on Minnesota case should set the stage for this.

CA: Two-stage process – here's the problem, now how do you solve it.

RM: Should pieces of Minnesota case appear earlier in case to start setting the stage and preparing for the wrap-up?

GM: GIS examples used by researchers and others – maybe this is a really good example of intersecting interests and communities.

## **Unit 7**

Typo on Unit Title Page “Conclusion” in printed version

This unit is just a placeholder right now – needs to be fleshed out.

## **Appendix**

Right now just has course bibliography. Can be expanded to include other items.

## Discussion of Pre- and Post-Course Materials

### Invitation

SR: In the first paragraph we identify our audience. Then we move onto the goals of the workshop, at an introductory level, mentioning that we are not teaching how to create or write metadata, we will not be doing hands-on coding. Then we include the when and where, how to RSVP and finally how the workshops arose out of the NHPRC grant. So, what do you think?

JC: Do we need to mention what some of the benefits of the workshop might be? A return to persuasion?

FE: Do people like coming to workshops in Minnesota?

SR: If the workshops are free, and if they have an interest in the content.

FE: Sometimes I have a hard time of convincing people to come to these type of things.

SR: Do we need to take John's suggestions? We could make the second paragraph more general about business use and cover benefits.

RM: We could go back to scare tactics. Don't you have a scary flier that you showed us once?

SR: Our legal risk analysis design – a one-page piece for managers highlighting the risks of records mismanagement.

FE: I am coming from the Smithsonian where people are busy and don't have time to come to these things.

BH: We could boil it down to essential elements, put in bullet points. It could be different for each of your audiences depending on what you feel their needs are.

SR: As John suggested, making it more persuasive. Is there anything that you don't like that's covered in the invitation?

### 2<sup>nd</sup> workshop e-mail

### Recommended readings

SR: What is your reaction to the recommended readings? Are there too many to look at? Can we prioritize them in some way? They were chosen because no where in the course

do we get into basic electronic records management and we felt these readings are a broad and general introduction to the topic.

GM: I am not familiar with the DLM Forum materials.

RM: All of the readings are pretty hefty. I printed them out and brought them along, I will pass them around so you can take a look.

FE: Will we lose people if we ask them to read all of this?

BH: We could prioritize by putting the metadata reading first.

CR: We could add the number of pages of each reading so people can prioritize on their own.

GM: Or add annotations. This reading is an easy read, whereas this is one is more extensive.

FE: Maybe with the DLM reading identify the parts that are of greater concern and relate more to the workshop.

RM: The metadata reading is very complementary to the workshop. It provides an excellent context. Maybe we could link directly to the paper only, which is really the meat of the reading.

SR: I think annotations would be the way to go so people can self-prioritize.

RM: Or within workshop, say how certain topics relate to the recommended readings.

BH: We could provide annotations and explain what they will learn from each reading.

JC: It is very difficult to get people in our organization to do anything to prepare. Do you think you might want to include a cheat sheet, a list of some of the basic concepts of each reading?

BH: That would be the way I would handle it, bullet points, identify issues that will come up in the workshop. Identify where in the readings they can read about these topics ahead of time.

## **Online materials**

SR: What about the online materials? What is your reaction to this approach, trying to keep them focused, providing more information on electronic records, metadata and XML. Do you know of any other general metadata resources we could include? We currently only list one. If you come up with any let us know.

## Self-evaluation

SR: The self-evaluation is meant to help the participants get their thinking on order before the class, and to help us tailor the content beforehand. What do you think?

GM: It does seem a bit long.

BH: We could focus it more on the persuasive side.

SR: How do we do that in the self-evaluation?

BH: Get them thinking overall about their program and partners, or related issues, such as risk management. Ask about problems with information management. Have they heard about people going to jail because of mismanaged data? Privacy issues? That's the stick rather than the carrot. Carrot would be can they share information? Re-use it? Manage it as a resource?

SR: Right now the self-evaluation is pointed toward archivists, not IT people.

GM: What is the design purpose here, to get them thinking about metadata or to get the instructor familiar with their issues?

SR: Yes to both. We want them to think about their own environment, and help us modify workshops to better fit their needs. The self-evaluation will also help them with the participant introductions.

GM: You might want to add a sentence or two at beginning to state purpose of the self-evaluation to let them know why they should fill it out.

FE: How many people were you expecting to attend the workshops? Were you going to limit the number to 20-25?

BH: For discussion, any number past 12-15 gets unmanageable.

FE: Are you going after web-masters, similar types of people, people from the same organization...?

BH: It's up to you guys. For the Smithsonian it is loud and clear that you want to talk about materials in digital format, as well as address business people and curators, and not just IT people. The content would be altered to address that.

SR: Judy might have us talk to 15 web masters, or she'll be able to take it around to different groups herself.

BH: In Minnesota, we have different people interested in records and data administration, which we'll have to address. We'll need to fine-tune the workshops with

the self-evaluation. We will also need information from you on how to best customize the workshops for your chosen audiences.

SR: What we can do is make the questions not only pointed at archivists, but others as well. But you guys know best what questions to ask. We'll need your input. Does that seem reasonable?

GM: At what point can we share this material outside of this room?

BH: Tonight, but keep in mind that's based on what we've heard today we are going to change it.

SR: I don't want to set a timeline, but we will give you a revised version for your approval. The idea is at the end of this, all the workshop materials will be available online, so that you can pick it up and tweak it to fit your needs. We'll make everything available, so that you as instructors will have the basic information to present the workshops on your own.

BH: Or, after the first free visit to each of your sites, you have the option to bring us back at your expense. As for the self-evaluation, we want to get people familiar with our ideas, but we want them to benefit too.

SR: It's for their own good to guide us as to course content.

## **Post-Course**

SR: The concept is to maintain contact with the participants after the course. We want them to remember what they learned and implement it in some way. So we'll send them information on case studies and examples of further implementation to keep them inspired. We want them to take action and think on their own. Each e-mail will point to additional resources, any projects or case studies you can think of this is where we want to highlight it. We don't want to include anything in the post-course that we're covering in the course. Will you send us pointers to resources you think might be useful? Information on tools, Richard, will also be helpful. Information on XML and metadata, anything that helps them put it to use. We will also be including an evaluation, asking if they are using any metadata standards, what now do they wish they had learned in the workshop, etc. Do you have any questions?

JC: One group we haven't mentioned here is managers. Have you ever had to go to the managers and sell it there before you sell it to the people?

BH: Yes, all the time. It is an intractable problem, because we haven't found a way to reach them successfully. They are not interested in the techniques to reach their policy goals, they're interested in their policy goals. You have to link the two. It's a long-term

laborious process. You need to find the group that will listen, and it'll be different for each situation.

## Next Steps

BH: Let me address what we heard today. We have been keeping a report on the discussions, and we'll have that as a turn-around document. It's a record of the spirit of what was said. Amend it to reflect what you think you said, and return it to us with corrections and additions. As I was keeping track of our discussion, I came up with seven general points to address as we start the revision:

### Course:

1. Needs to be more persuasive.
2. More streamlined and focused presentation in terms of message. Point to themes consistently.
3. Archivists become partners – everyone's involved.
4. Digital information and content, not just records; make terminology less archives-oriented.
5. Emphasis on business processes and needs in addition to records management and archival needs. Cover record use and creation, and why everyone needs metadata.
6. Point this towards a finale of participants' making decisions about their own needs and implementation.
7. Include concrete examples with relevance to particular audiences.

We'll use this as a model for revisions. We are solid on overall structure, content, focus, but we will streamline and deal with terminology. We now have a better idea of what audience we have in mind and the message we want to get across.

JC: Maybe you've already implied this, but it will be good to include concrete examples that have relevance to the audience you want to address.

BH: What we're looking towards is developing content on XML, and fitting it into a similar template. I assume that all the points we just covered apply equally to the XML workshop. And we will use the same set of examples. What we need is content, Richard will help us, as well as all of you. We also need examples, and resources.

SR: We will make a lot more use of the listserv since we won't be meeting with you again. We will use the listserv for drafts and such.

RM: There is an office where I work which has created an outreach group for education. There is a researcher in charge, and this group should be able to provide resources for the XML workshop. I will chat with him when I go back. This is an opportunity to get this education group involved with archivists, records managers and various projects. If they're interested in participating, even as advising, it's a good omen for future projects. Developing the XML workshop will be so much easier with this great metadata template.

BH: Send us the content and we'll get started.

GM: Maybe the XML course will also inform this one, examples which can feed into both.

BH: We have thought about using a lot of the metadata-related examples in the XML workshop. We're planning to give both workshops within two days at your sites. We're looking at a set of visits that provisionally start in early summer: May, June, and July. We need time to first develop material before we present the workshops at your sites, and then time after our visit to subsequently revise and refine and put the materials online before the end of 2002.

CA: And, you're thinking of 15-20 participants?

SR: We would like to keep it around 15.

BH: What we'll have when we visit your sites is a not quite finished product. We'll still have an opportunity to refine the materials. As for scheduling, we'll identify some possible dates, which we'll send to you to start filling in. We'll need enough time ahead of our visit to allow for customization. We will depend on you for specific metadata standards and information on audiences, enough detail necessary for us to do five different versions. While we're not looking at major revisions, it is important for us to have enough time. You all will also have to think about who to invite and it's entirely up to you. We intend to begin the invitation process one month before the workshop, in order to have time for the RSVP and preparation with the pre-course materials. So keep that in mind as you plan. We'll fly in and present, some combination of the three of us. The ideal situation is we come in and there are two workshops in two days, one on metadata and one on XML. Ideally, you supply a projector and screen. We can bring laptops, and we will have within the budget, unless something unforeseen occurs, enough money to be able to cover snacks and lunches as an added incentive for people to come. In all honesty, good food is a key ingredient.

CA: It never ceases to amaze me how much it matters.

BH: So in addition to developing the participant list, we'll need a data projector, and the exercises will involve flip charts, easel, pad, paper, and markers, if you could provide those also. We will run-through a variety of beta tests of these workshops in Minnesota, so we'll develop lists of steps and resources for preparation of the workshops, so by the time you need to host something we'll have a comprehensive guideline of what and when. All of these materials becomes a part of the product which will be available online. Everything will be made freely available. What we'll have provided is all the pieces so others can present the workshops. We'll be happy at the end of the project to come in on a fee basis and present, but the idea is for people to do it themselves. One of the final products will be reports on our visits to all of you and how it worked at your sites, what did we talk about where and how did it go?

We'll be sending out a turnaround document of today's proceedings, not verbatim, but comprehensive in terms of substance. So keep in mind that you need to start thinking about dates, invitees, what materials do we need to present at your sites. Any suggestions you have, any input at all, will be helpful. We're incredibly appreciative of your time and comments today, but at any point feel free send your suggestions and input to us. More and more groups will have a chance to comment on the workshops, so they will go through several iterations. Once you get the next version of the workshop, feel free to show it to people. The next version will better address what we covered today and will be easier to present to other people. Thank you very much for your participation and attention throughout a long day. And, please thank Shawn and Jennifer for all their work.

## Future Steps

1. Finalize metadata workshop
2. Content on XML fit into metadata workshop template
  - a. RM will talk to the new San Diego Supercomputer Center education group to try to get them involved in this collaboration
  - b. Project team will start making greater use of project listserv to solicit input from partners
3. Project team will visit partner institutions sometime early summer 2002 to do two one-day workshops (metadata and XML)
  - a. Project team will send out list of possible dates (sometime this calendar year?) to schedule for 2002
  - b. No more than 15 people; friendly test audience (people interested in topic, etc.); mixed IT, archivists, and others – partners need to start thinking about who they want to target
  - c. Will include formal course evaluation
  - d. Each institution will need to supply us
    - i. Invitation list with e-mail addresses
    - ii. Customized content suggestions
    - iii. Data projector, easel and pad, markers, etc. Project team will bring own laptops
  - e. Refreshments should be covered by project budget
  - f. After each visit, workshop content will be revised and refined
4. All project and course materials will be put online
  - a. for adoption/adaptation and use by institutions on their own
  - b. MHS could come for a fee and present workshops after initial round of testing

## Metadata Branding

Project team met with their partners in Minnesota government on topic of metadata. Among the issues: No one understands us, and metadata is a cumbersome, unappealing term and idea. Non-metadata people want something to take away from metadata workshops to post on their cube wall or play with (like a rubber duck to go along with the GIS-related slogan “Don’t duck metadata!”). Need to make metadata more friendly.

MHS State Archives staff and partners came up with an image for putting on web sites, bookmarks, etc. – “Powered by Metadata.” On a web site, the logo would be a hot link to a page explaining what metadata is and what it’s used for. Hopefully it will become widely recognized as a sign that the web site utilizes metadata.

If all goes as planned, this branding effort should be concluded by the time the workshops are ready for testing and therefore could be part of the course in some form. Is this appealing to the project partners?

General consensus that the idea was appealing, although there was disappointment that we did not bring along a “Don’t duck metadata!” duck.