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HELIN Consortium LORI Grant Repository Working Groups

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RI Digital Portal Working Groups

Designing and making the digital portal work requires two kinds of groups: working groups and focus groups.

The working groups are ongoing, operating over most of the life of the project. They have a charge and do actual work. Some working groups will start in September and continue beyond September 30, 2014 and other working groups will get started later.

A focus group is where the public engagement process starts akin to how focus groups for a business are used to gather market intelligence. They meet once or twice and are focused on gathering perceptions, data and trends. LYRASIS ran some initial focus groups on July 14, 2014. Working groups, once they are formally established, will be facilitating focus groups as well.

Six Working Groups

Phase I working groups that start in September 2014
- Meta data/technical infrastructure
- Content creation/standards
- Governance and management
- Market message/communication infrastructure/community engagement

Phase II working groups
- Project funding and sustainability
- Content applications

Scopes of Work for the Phase I Working Groups

I. Metadata Practices and Technical Infrastructure/Platforms
This working group focuses on administrative and delivery.

Scope/Charge
This would be one working group with two sub-groups: **metadata** and **platforms**. These two conversations are so interdependent that the sub-groups need to be part of one larger group and regularly talk to each other.

This includes the work of the Hackathon(s) too (some of the other working groups could sponsor "Hacks" as well?)

Sub-Groups

<u>Data Processing/Technology</u>
- Meta Data
- Artificial Intelligence
  - Natural Language Processing
  - Information Retrieval
  - Machine Learning
- Existing "off the shelf" tech review/procurement
- Integrations via APIs

<u>Interface Design/Platform</u>
- Information Architecture
- User Experience
- Monitoring Usability/suggesting improvements
- Front End Coder(s)

Leader: Martha Sanders, HELIN

II. Content Creation/Standards

Scope
- Training in digitization, metadata, and building community partnerships focused on content identification and creation
- Combine peer groups that have technology with those that don't
- Standards: minimum vs. best practices; don't set the bar so high that it's out of reach for the smaller organizations

Sub-Groups

<u>Content Creation</u>
- This is about digitization (hardware/equipment, software, content creation locations) using standards identified by the HELIN Digital Initiatives Task Force
- The HELIN Digital Initiatives Task Force also did hardware/equipment and software analysis for the HELIN schools

<u>Collection Management</u>
- Development, including copyright and digital preservation

<u>Content Use</u>
- This group would focus on research and educational uses of content—such as aggregating collections and building content pages under topics or themes
- Pilot #1 is culture and heritage
- Pilot # 2 is business and economy

Leader: Diana Corderre, Digital Ark

III. Governance and Management

Scope

Governance
- Governance/organizational structure/decision making (Currently the Steering Committee provides this function, but could also be a subcommittee)

Management and Administrative Support
- Coordination between working groups and teams
- Design operational processes
- Management (probably starts with the Steering Committee)

Leader: Mark Caprio

IV. Marketing Message/Communication Infrastructure/Community Engagement
This becomes the Communications Team

Scope
Marketing, communication, and community engagement are mutually dependent

Brand and Message
- Branding: what is in a name?
- Develop a common language/definition of terms to use among all the disciplines involved in this project, e.g., many users will not be librarians
- Create a simple website with basic information, including an orientation video about the repository
- Identify metrics for info-graphics, depicting impact...empowering advocacy...outcomes and impact in the form of info-graphics

Community Engagement
- Marketing the (yet to be) established message and ongoing community development and involvement of users
- Use social media
- Engage the community
- Manage relationships

Phase II Scopes of Work for Working Groups

V. Project Sustainability and Funding

Scope
- Develop comprehensive financial model comprised of both grant funding revenue generation and investments (with an expected return)
- Analyze existing digital portal and repository business models, i.e., economic development and business data

- Offer shared grant, collaborative application opportunity among digital portal partners
- Use an ecosystem style approach that allow for 3rd party additions, transactions and development

VI. Content Applications

Scope
Applications are what users can create on their own to make the repository work for them. The aim of this group would be to demonstrate a handful of applications of what is possible. And based on the short list of applications infer a first cut of the draft protocol for developing applications.

- Work with stakeholders, e.g., K-12 and higher education for repository asset use:
    - Teachers development teaching tools, e.g., virtual textbooks
    - Create collection "topic" pages
    - Develop lesson plans for teacher/student engagement with repository collections

Robert Leaver – New Commons