## CEAL Task Force on Metadata Standards and Best Practices for East Asian Electronic Resources Annual Report, 2013-2014

## Prepared by Bie-hwa Ma and Chengzhi Wang

**Formation of the Task Force**

In order to improve user experience in discovering e-contents and accessing e-resources, on Nov. 4, 2013, Ms. Shi Deng, Chair of CTP and Bie-hwa Ma proposed to the CEAL Executive Board (EB) to form a group to promote established e-resources related metadata standards and best practices. On Nov. 19, The CEAL EB approved the formation and charges of the new group named [CEAL Task Force on Metadata Standards and Best Practices for East Asian Electronic Resources](http://www.eastasianlib.org/ctp/Subcommittees/sub_metadata_standards.htm) (CEAL ERMB Task Force or ERMB).

**Membership:** Bie-Hwa Ma (co-Chair, UCSD, for technical services), Chengzhi Wang (co-Chair, Columbia, for collections and public services), Susan Xue (UCB), Haruko Nakamura (Yale), Miree Ku (Duke), Connie Lam (HKU), Charlene Chou (U. Washington), Mieko Mazza (Stanford), Erica Chang (U. Hawai’i), Shi Deng (UCSD)

**Task Force Charges:** Investigate best practices; address issues; promotes compliance with well-established metadata standards and best practices; liaison with national and international working groups; organize training workshops and educational programs. For complete charges, click [here](http://www.eastasianlib.org/ctp/Subcommittees/sub_metadata_standards.htm) to the ERMB website.

**CEAL ERMB Task Report, Nov. 2013 – March 2014**

1. **CEAL Preconference Workshop on Electronic Resources Standards and Best Practices,” March 25, 2014, 9:00-4:30**

* [**Program description**](http://www.eastasianlib.org/ctp/Workshops/2014/2014%20CEAL%20Workshop%20Registration.pdf) **:** This kick-off program was designed to provide introduction to major e-resources related metadata standards and best practices in hope that vendors would see the benefits from compliance with the standards and best practices and follow them to improve user experience in resource discovery and access as well as to increase their sales of e-resources.
* **Participant demographics:** 89 out of 94 registered attended. Among the registered were 20 vendors, 30+ librarians/support staff responsible for collection development and/or public services, 13 from web services, 7 from digital library program, as well as 65 involved with technical services, CTP’s typical workshop participants.
* **Covered topics and speakers:**
* OpenURL, DOI, KBART, and IOTA (Nettie Lagace, Associate Director for Programs, National Information Standards Organization (NISO))
* CJK E-resources metadata and presentation problems that cause access and discovery issues (ERMB members)
* PIE-J, ISSN, ISNI, and ORCID (Regina Romano Reynolds, Head, ISSN Section and Director, U.S. ISSN Center)
* Survey results on vendor and librarian awareness of the E-resources standards and best practices (ERMB members)
* For **Workshop presentations** files, click [here](http://www.eastasianlib.org/ctp/Workshops/2014/2014%20CEAL%20Workshops.pdf).
* **Workshop Evaluation**: Evaluation results show that almost all of the participants had very positive experience with the Workshop. For evaluation details, see CEAL Committee on Technical Processing Annual Report, 2013-2014.

1. **Pre-workshop Surveys - Survey on Metadata Standards and Best Practices for E-Resources, Vendor/Publisher Version and Library Version**

The main purpose of this survey was to preliminarily understand the level of librarian and vendor/publisher awareness of established metadata standards and best practices for e-resources, one of the preconference workshop topics. Other survey goals were: to have an environmental scan; to identify the awareness gap between librarians and vendors; and to find ways to bridge the gaps.

* **Survey Design**

In the beginning of December, Bie-Hwa initiated, and all ERMB members participated in, the design of the English surveys (Library and Vendor versions) which were translated into four language versions, including Japanese, Korean, Chinese simplified, and Chinese traditional scripts. All versions were carefully reviewed by metadata services and non-metadata services professionals in the U.S. and Asia. Google form was used as the primary tool for survey designing and basic analysis. Library version was longer and more detailed.

* **Survey Distribution**

At the end of Jan. 2014, library survey invitation was sent to listservs of CEAL, CALA, Asian library associations, and library consortia in Asia. The invitation was also posted to Facebook groups in Mainland China, Taiwan, Hon Kong, and Macau. ERMB members along with CCM, CJM and CKM distributed the vendor/publisher survey to Asian e-resources providers through varieties of channels.

* **Participant Demographics:**
* Vendor/Publisher version: 22 participants (8 from China and Taiwan, 7 from Japan, 6 from Korea, and 1 from North America)
* Library version: 73 librarians/support staff participated (33 from Mainland China, Hong Kong, and Taiwan; 11 from Japan, 1 from Korea, 1 from Europe, and 1 from Australia)
* **Preliminary Results** (click on one of the hyperlinks below for individual version)
* [Vendor/publisher Version](https://docs.google.com/forms/d/1LWOlONq6O_BeJUj3hDbGAkrFJiFZpkZjYsdMV9OGCug/viewanalytics) (See also the [survey result presentations](http://www.eastasianlib.org/ctp/Workshops/2014/2014%20CEAL%20Workshops.pdf))
* [Library Version](https://docs.google.com/forms/d/1HdxGIfwAKH4xlvJyQC6OyoBl7rzNwN_5fyak0FZ4Wds/viewanalytics)(See also the [survey result presentations](http://www.eastasianlib.org/ctp/Workshops/2014/2014%20CEAL%20Workshops.pdf))

1. **CEAL Electronic Resources: Librarians and Vendors Round Table, March 27, 2014**

MERB members participated in the session. Shi Deng, Chengzhi Wang, and Bie-Hwa Ma shared the MERB background information, charge and goals, and brief results of MERB surveys, and MERB next-step plans were reported. Chairs of CCM, CJM, CKM, and CPS discussed the needs and requirements, followed by discussion among participants. MERB members took minutes of the round table, and the minutes have been posted online at [here](http://www.eastasianlib.org/ctp/meetings.htm#RoundTable).

**4. Next Steps**

With the given charges, ERMB members identified the following tasks as focuses for the time period of 2013-2016. 1) Sets up communication channels such as email lists, Listservs, and/or Wiki page to open dialogues among librarians, E-resources publishers, and providers Creates cheat sheets of Standards and Best Practices; 2) Gathers comments in response to calls for reviewing standards or best practices; 3) Holds CJK language Webinars on specific standards and best practices; 4) organizes preconference Workshops; 5) Creates information HUB at the CEAL ERMB Task Force Website; 6) Promotes Collaboration by initiating projects, connecting colleagues, brainstorming for ideas, etc.