Workshop #5 Summary

When: February 10-14, 2003

Where: Crowne Plaza Hotel Georgia, Vancouver, BC

Attendees: Paul Berkman, Jean-François Blanchette, Marta Braun, Margaret Campbell, Martine Cardin, Carolyn Caseñas, Su-Shing Chen, Hao Chenhui, Michele Cloonan, Barbara Craig, Henry Daniel, Ben Howell Davis, Hannelore Dekeyser, Glenn Dingwall, Luciana Duranti, Du Mei, Terry Eastwood, Philip Eppard, Sharon Farb, Sidney Fels, Gigliola Fioravanti, Tahra Fung, Victoria Gebert, Kevin Glick, Elaine Goh, Yvette Hackett, Babak Hamidzadeh, P.C. Hariharan, Peggy Heger, Hans Hofman, Sally Hubbard, Rick Kopak, Ian Lancashire, Tracey Lauriault, Michael Longton, Randal Luckow, Terry Maxwell, Jean-Pascal Morghese, Michael Murphy, Vivek Navale, Linda Nobrega, Isabella Orefice, Sandy Orr, Richard Pearce-Moses, Andrew Rodger, Shelby Sanett, Anthea Seles, Jim Suderman, Jill Teasley, Ken Thibodeau, Kate Theimer, James Turner, Bill Underwood, George Wootton

Workshop Objectives:
1. Review of Domain Task Forces' research questions, assess activities to date, determine methodologies, and assign activities to researchers
2. Review of Cross-domain Research Teams' methodology statements and creation of schedule of activities
3. Review of Focus Task Forces' progress, future activities and methodologies
4. Discussion of Focus Task Forces' activities in relation to cross-domain research activities
5. Discussion of the unified model and modeling methodology
6. Review the purpose and methods of modeling in InterPARES 2
7. Review and approve new case study proposals

Summary:

Workshop #5 began with the suggestion to have working groups, cross-domains, and national teams submit reports on their recent activities. These reports were followed by a brief discussion on the role of Graduate Research Assistants (GRAs) and their tasks leading up to the next workshop. There was also an update on the "Intellectual Framework" document. Editorial changes to the framework were suggested in various areas.

The International Team discussed the modeling team's attempt to create a unified model, based on three prior models, which would cover the entire lifecycle of records. The group also heard a presentation on notation formats by B. Hamidzadeh. Discussion on modeling also covered who should create models, what should be modeled, and the time commitment involved in this activity. The team approved three case study proposals. The

team also covered administrative issues such as listservs and web site content, and the employment of GRAs.

Domain 1 reviewed the main activities it was responsible for, determined what was currently being done to accomplish its objectives, and assigned responsibilities to its members. The group also discussed the need to create a form or a tool to map the domain and focus questions in order to see how case studies would be able to answer domain questions. The responsibilities of the GRAs in this domain were outlined and potential problems related to the collection of information were considered. The task force also discussed how modeling would occur within this domain.   The team broke down their work into five phases, 1) reviewing case studies and populating the Domain 1 Research Tool by the GRAs, 2) identifying gaps and refining the questions accordingly, 3) ensuring that case studies make specific attempts to study the Domain questions, 4) feeding results to the interim chair, and 5) presenting findings at the Workshop in LA.

The Domain 2 Task Force reviewed its research questions, which included determining appropriate terminology. The group also wanted to assess the extent to which its research questions were addressed by the activities that have already been defined and initiated. This involved reviewing the mandate of the domain, examining what activities were already in progress, and suggesting methods of ensuring that questions relating to the domain were included in the case studies. The task force also addressed the topics of modeling and conceptual analysis, but determined that other work would have to be done before these topics could be properly addressed.

The Domain 3 Task Force examined its research questions and mandate. The group focused on determining its role as it related to the rest of the project and in particular, the modeling group. Domain 3 also examined the proposed case studies to determine which, if any, related to its research questions.

The Focus 1 Task Force meeting began with reports from the work of the three domains. The group considered a request from the Policy Cross-domain to compile information about standards or legislation relating to the focus. The group also heard progress reports from current case studies and new proposals for two more case studies. This led to a discussion of case study methodology including the requirements of the ""Intellectual Framework." The group also discussed the status of its annotated bibliography and assigned responsibility for updates.

The Focus 2 Task Force also heard reports from each domain. The group considered the domains and case studies, and how each of them related to Focus 2, and how they could be coordinated. The group also reviewed the deliverables as outlined in the "Milestones Report" and the role, mandate, and expected outcomes of the Focus.

The Focus 3 Task Force reviewed their responsibilities and obligations in relation to the "Milestone Report," and heard reports from each domain. The Focus examined the four case studies that were currently being conducted. Researchers also discussed who would

be responsible for the analysis of the case studies and identified areas that were not being addressed by the Focus' current case studies.

The Description Cross-domain reviewed its research questions, timelines, and research activities. Members of the group heard reports on modeling, which revealed the type of work that was being done in the Focuses and Domains, and how this work would eventually affect the Description Cross-domain. Members also heard a status report on the Variable Media Network case study. There was also a discussion on assigning tasks to GRAs.

The Policy Cross-domain reviewed its research questions, responsibilities, and expected deliverables. This included a discussion on how to extract information from the Domain and Focus Task Forces, which involved assigning responsibility to the group's members. The group also outlined the tasks appropriate for GRAs.

The Terminology Cross-domain focused on the need to clarify its scope and purpose. The group recognized the need for a framework of how the work of the Cross-domain would proceed, as well as a framework for dictionaries and definitions. A significant amount of the discussion involved how such a dictionary or concordance would be created. The group created a timeline for all of the work that was discussed during this meeting.

The modeling team reviewed the UBC Model and the case study modeling diagrams, as well as attempted to set parameters. The team also defined the purpose of modeling in the InterPARES Project in order to examine how its work related to the overall research of InterPARES 2.

Workshop #5 concluded with reports by the modeling team, the International Team, the Focuses and the Cross-domains.

Next International Team Research Workshop:
Antwerp, Belgium (June 23-25, 2003)