Designated Communities, OAIS and Assessment

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DPC: Practical Preservation and People
PRONI
2015-12-03
UK Data Service

Me
• History Data Service
• JISC Digitisation Metadata
• Preservation Planning Manager
• Data Seal of Approval (DSA) Board
• DPC after lunch recovery speaker

Us
• Social Sciences and Humanities (and the rest)
• UK Data Archive
• Lead partner UK Data Service at University of Essex
• Hosts of Administrative Data Service (ADS)
• Hosts of Big and Local Government Support Network
UK Data Archive

- Early assessment of OAIS and METS
- ISO27001 for Information Security
  - Secure Data Service, now integrated
- Data Seal of Approval (DSA), founding member
  - after DANS created it
- DSA Community and Board Member
  - Assessments part of contribution
- Self-Assessment against (draft) ISO16363
  - As part of the APARSEN Project
The Topic(s)

- Designated Community
- OAIS
- Assessment
The Metadata Bit?

Metadata, at it’s best, is a solution to a problem Addressing the [messy] information challenge by breaking up [the appropriate amount necessary to meet our goals] into smaller more manageable chunks.

Metadata professionals, at their best, retain a 40,000 feet view of their organisations information so they can contribute across existing and new business information, not just digital object management.
Discipline X, Type Y, [Research] Data Management

Challenges

- Not about Discipline X-specific Research Data
- Not about Type Y Data of relevance to Research
- Not about Research Data
- Not about Data
- Actually about Management
- Often a challenge…around people and information
Practical?

- A scalable approach
  - From narrow to broad
  - From small to large
  - Across disciplines
  - Across types of data
- A community of (best) practice with a common language and goals
- But expectations adjusted to match our missions and our resources

Then…

discipline- and data-specific extensions
An Exciting New Information Model

- Data
- Not Data

Errr…. That’s it

All addressed via information, which needs to be managed

(+ common decency and basic manners because not data includes people)
An Exciting New Information Model

Addressing *Not Data*

- A common model of the object (data and *not data*) you’re looking after
- Understanding whether the *not data* is
  - Part of the object
  - Part of the process (used to manage the object)
- Whether *not data* needs to be associated with the object
  - Bundled or linked
- Or not…?
  - Policies, workflows, procedures, reference documents?
An Exciting New Information Model

From Not Data to Metadata

• From disintegrated to integrated
• From unstructured to structured
• From gross to granular
• From ad hoc to standards-compliant
• From chaotic, to:
  • Accessible to…
  • Human-understandable to…
  • Machine-actionable
Contractual Obligation Moment: UKDA OAIS
Designated Communities

A critical reference point from the OAIS

- People (by definition) with links to associated knowledge and technology
  - Define
  - Identify
  - Query
  - Analyse
  - Report
  - Act (to change or not to change)
  - Redefine

- All data/metadata which needs to be managed
Designated Communities & the real world

The 40,000 feet view….

Designated Communities are just one of the stakeholders that influence our actions:

- Governments
- Funders
- Host Organisation
- Data Producers
- Peer organisations
- Digital Preservation Coalition
- ‘Users’
Can we manage this wider metadata set?
OAIS- are its strengths its weaknesses?

- *Designated Community* is the OAIS target
- *Stakeholder* management let’s us place other influences alongside the needs of the designated community.

**OAIS focus on the Repository Functions**

- Clear reference point for the ‘community’
- But no engaged community of:
  - Implementation
  - Alignment
  - Improvement
  - Integration into our wider systems
OAIS 2017 Review - The Plug


- If you’ve read it and have an opinion then share it!
- If you haven’t read it, then read it, then form an opinion and share it!
- If this has no meaning or relevance to you, then that’s an opinion, share it!
OAIS… and the rest… Assessment

OAIS has been joined by a Framework of Trust Standards:

- **Baseline: Data Seal of Approval (DSA)**
  - (RDA Common Guidelines with WDS)
- **Intermediate: DSA+ self-assessment**
  - against NESTOR DIN 31644 or ISO16363
- **Advanced: DSA+ ISO16363 Trusted Digital Repositories**

- **Developing communities of practice**
  - around these standards?
  - around this hierarchy
OAIS… and the rest…Assessment

What do they have in common?

• They’re about assessment…
• About metrics and evaluation and scores
  • And being good at exams isn’t enough…

• We’ve all found the resources (time, money, people and technology) to develop a website
• We’ve all faced the challenges of keeping that site up to date and maintained
Assessment and Information (metadata) Management

- In a world where change is a matter of course
- With big, administrative and social data... and the rest
- It’s not enough to build our world around good scores on assessments
- We need to build maintainable, business information
  - A community of (best) practice with a common language and goals
  - But expectations adjusted to match our resources

E.g. integration of designated community management into stakeholder management.
Assessment and Information (metadata) Management

Maintainable business information:

• To support our day-to-day activities
• To support the services we provide
• Those services are made of people and metadata
• Which serve our Designated Communities
• If we can do that well… we’ve done our job
Assessment and Information (metadata) Management

• If we can do that well… we’ve done our job

Then…if we want to work within a common community of improvement

• We should link the information we use to deliver services to the assessment standards

• Not design our business to meet assessment criteria
Questions