

Vocabulary Maintenance Specification Task Group Charter - A Task Group of the Process Interest Group

1. Convener

- Steve Baskauf

2. Core Members

- Stan Blum (Process IG)
- Greg Whitbread (Technical Architecture Interest Group; TAG)
- John Wiecek (Darwin Core; DwC)
- Bob Morris (Audubon Core)
- Terry Catapano (METS, Plazi)

3. Motivation

- A draft TDWG Standards Documentation Specification (<http://www.tdwg.org/standards/147/>) was written in 2007, but was never submitted for ratification. During the years since then it has proven to need some enhancements. It provides no guidance about machine-readable documentation. It also provides no formal versioning scheme, and only states that any substantive change in a standard must take place by replacing it with a new standard. This makes it difficult to maintain conceptual standards, such as ontologies and vocabularies. The draft standard also uses obscure terminology for categories of documents ("Type 1", "Type 2", and "Type 3") that some believe adds confusion to the standards process.
- Although TDWG has a process for adopting new standards (<http://www.tdwg.org/about-tdwg/process/>), there is no TDWG-wide process that has been specified for making changes to existing standards that are vocabularies.

4. Goals Outputs and Outcomes

- Produce a new Standards Documentation Specification focused specifically on the formatting of human and machine-readable documents used to describe standards. This specification would replace the current draft and would be carried through the standards track to ratification.
- Produce a Vocabulary Maintenance Specification focused on the process by which standards that are vocabularies would be modified and amended. The specification would be developed using as a starting point the Term Change Policy of the Darwin Core (DwC) Namespace Policy (<http://rs.tdwg.org/dwc/terms/namespace/index.htm#classesofchanges>). The specification's development would be informed by the experience gained from

applying the DwC Namespace Policy and by the processes used by other standards organizations. This specification would apply to all current and future TDWG vocabularies and would be carried through the standards track to ratification.

- Target dates for both standards (<http://www.tdwg.org/about-tdwg/process/>):
 1. Complete working draft for submission to executive and appointment of review manager, 2015-07-15.
 2. Initiate expert review, 2015-08-15.
 3. Reviews submitted to executive, 2015-09-15.
 4. Initiate public review of proposed standard, 2015-09-28 (starting date of 2015 TDWG Annual Meeting).
 5. Complete public review, 2015-11-01
 6. Modify draft in light of review, submit revised draft to Executive, 2015-12-01.
 7. Standard ratified by Executive, 2016-01-01.

5. Strategy

- Begin by examining the recommendations of the Vocabulary Management Task Group (VoMaG) in its report (<http://www.gbif.org/resources/2246>).
- Create a list of issues that apply to each of the two proposed standards. This list should include known problems that have been encountered in the adoption and modification of existing TDWG standards (notably the Darwin Core and Audubon Core vocabularies).
- Enumerate possible strategies for resolving each of the issues. Examine how other standards organizations address the same issues.
- Achieve consensus among task group members on the issues raised. Solicit input from informed sources outside of the task group as necessary.
- Construct standards documents based on the consensus solutions.

6. History/Context

- The draft TDWG Standards Documentation Specification was produced by the TDWG Infrastructure Project task group and authored by Roger Hyam in 2007. It provided guidelines documenting standards in human-readable form. Although the specification was never completed nor ratified as a Current Standard, it remains the only guidance available for the documentation of standards, including vocabularies. An important aspect of the specification was that it provides no scheme for versioning standards. Rather, all standards must be superseded by another standard with a different name. (Names may contain numbers and by inference may include a versioning scheme, but no scheme was proposed.)
- When the Darwin Core Standard was ratified in 2009, it included a Namespace Policy that provided a mechanism for making changes to the vocabulary in an incremental manner. This policy recognized that prohibition against versioning of standards was not practical for a vocabulary standard. Since Darwin Core's adoption, the Namespace Policy has been used successfully to modify and extend the vocabulary.
- In 2013, the Vocabulary Management Task Group (VoMaG) produced its report outlining a number of recommendations to TDWG on a number of topics relating to the management of vocabularies. Sections 2 and 5 of the report are noteworthy in the context of the work of this task group. Section 2 examined the Darwin Core Namespace Policy as a means to maintain technical specification standards that define vocabularies. It provided recommendations for resolving several long-standing issues related to vocabulary documentation and maintenance. Section 5 addressed the requirements for documenting and managing vocabularies. It suggested a workflow for managing vocabularies and made recommendations for their documentation and publication.

7. Summary

- The Vocabulary Maintenance Specification Task Group (created by the Process Interest Group and Technical Architecture Interest Group) has been charged with the development of a new Standards Documentation Specification and a Vocabulary Maintenance Specification. The Standards Documentation Specification will specify the format of human- and machine-readable documents that form TDWG standards and will supersede the current unratified draft specification. The Vocabulary Maintenance Specification will specify the process by which TDWG vocabularies will be modified and amended. The specification will be developed based on what has been learned from the application of the current Change Policy of the Darwin Core Namespace, and will apply to all current and future TDWG vocabularies.

8. Resources

- VoMaG report (<http://www.gbif.org/resources/2246>)
- An early outcome will be selection of a repository for documenting the group's work (e.g. GitHub, Google Code) and an archived email list.