Metadata Working Group

Terms of Reference

1. Purpose

The key to making research citable, searchable and accessible is registering datasets and other research outputs with metadata – descriptions of and facts and figures about the data – that meets basic standards and adheres to uniform, consistent schema.

The Metadata Working Group (WG) determines and maintains DataCite's metadata standard, in consultation with DataCite members and under the guidance of the DataCite Board. The working group actively seeks the broader community's input and coordinates with community standards, such as ORCID, DOI Foundation and DCMI. The Metadata Working Group aims to adhere to a release cycle of 12-18 months.

2. Governance

The Metadata WG is a working group and is overseen by the DataCite Board. The Metadata WG aligns efforts with the Services & Technology Steering Group and will coordinate with other new and existing DataCite governance groups as required.

3. Membership

The Metadata Working Group consists of 10-16 members to ensure progress and distribute tasks amongst working group members.

a. Term

Metadata WG members serve for a 2-year term. This term is renewable.

b. Appointment process

Membership is open to anyone with relevant expertise and different user perspectives, and the time and interest to participate fully. Any DataCite member can nominate an expert to serve on the Metadata WG. Membership is confirmed by the Metadata WG co-chairs, after discussion with the DataCite Executive Director. Member terms are renewed by the co-chairs. The seat is held by the individual representative, but we ask that their organization also approves the nomination. When members rotate off the Working Group there is an open call for new members.

c. Types of roles

Member(s); Members of the Metadata Working Group are individuals with expertise in metadata standards and use cases. The WG aims to have a ratio of 1:4 DataCite non-members to organizational members and seeks to have adequate representation from the DataCite consortium leads that represent large communities of organizations. Members have a good understanding of open repositories/infrastructures and the broader Open Science ecosystem. Members are expected to actively participate in one-hour monthly group meetings, volunteer, collaborate, and complete specific group goals. In addition to the monthly calls, Members are expected to contribute to the development of materials and documents related with the WG activities.

Subgroups can be formed as needed for specific tasks or topics and regularly report on the progress to the other members.

STSG representative; the Metadata WG elects a representative as a member of the Services & Technology Steering Group. The representative is appointed by the WG co-chairs and ratified by the STSG Chair.

Co-chairs; the Metadata WG has two co-chairs that have a shared role but divide tasks and responsibilities between them. Co-chairs are elected by the Working Group and the term aligns with their WG membership term (renewable). Co-Chairs are nominated by the remaining and departing Co-Chairs and Executive Director, elected by the WG and ratified by the DataCite Board. The responsibilities of the co-chairs include:
- Run monthly meeting and prepare agenda
- Post meeting notes on wiki, send meeting reminders or any other updates to list.
- Ensure meeting topics and discussions remain focused.
- Welcome new members via email and make sure they have access to the wiki and email list.
- Represent the Working Group on various occasions or events.
- Connect with DataCite staff where necessary.
- Ensure that emails received in the Google discussion group are answered.

It should be noted that the co-chair responsibilities can be 4-6 hours per week

4. Roles and Responsibilities

Membership of the WG requires active participation between meetings. Discussions around essential aspects about changes in the schema rely on feedback from all

members of the WG and, in addition, WG members are free to contribute more to those issues in the annual work agenda that interest them most/feel they can contribute the most.

5. Meetings

The Working Group meets once a month on a fixed day and time, via an online meeting. Monthly meetings last for an hour. The remainder of the work for the month is completed asynchronously via email, shared documents and/or through topic calls where members that join a specific point in the agenda meet to make progress. All agendas, meeting notes and accompanying materials will be placed on the collaborative working space.

6. Lines of communication and coordination

Alignment with STSG; The Services and Technology Steering Group (STSG) is responsible for providing expertise and advice on DataCite's product and technology development. The group suggests and reviews product and technology solutions to evaluate their impact and effectiveness. The Metadata WG and Product Engineering team are closely aligned in order to ensure that the schema release and service changes coincide. Product engineering and technical staff are also represented in the WG to strengthen the collaboration. The Metadata WG has an elected representative on the STSG to report on the WG's activities, upcoming release changes and to gather feedback.

Coordination with community groups (e.g. RDA Working Groups); The Metadata Working Group may coordinate with and take into account outcomes from community groups to inform the various decisions related to the DataCite Metadata Schema.

Discussion group(s) and forum(s); There are various channels for discussion and new ideas for metadata schema changes. Active discussions with the community are encouraged and once the items are considered by the WG, these are then validated via the DataCite Roadmap board. The Metadata WG will make use of open discussion forums to provide a platform for these discussions. The details about the communication channels are maintained on https://schema.datacite.org.

7. Schema change journey

DataCite receives metadata requests from the community in many ways, such as product roadmap ideas, support emails, open hours etc. In addition, the Metadata WG receives requests directly from the community in open channels. In order to support the validation of these changes, the proposed schema changes are added to the DataCite public product roadmap for community feedback and validation. The product roadmap is managed by the Product Engineering team.

Each quarter, DataCite staff runs a validation session on a set of selected requests with the community (Open Hours). Each metadata request is presented (if possible, by the proposer) to better understand the request, related use cases, potential alternative solutions and interest from others in the community. The metadata requests that have support from the community are compiled into a schema change document and sent to Metadata WG for further discussion, verification and next steps.

In order to ensure that the schema release and service changes coincide, as soon as the planned changes (not the specific metadata details) for the next schema release are known, the Metadata WG notifies the Product Engineering team so that the product specification can be developed in parallel whilst the more specific details are being defined by the WG.

Once Metadata WG has drafted the final schema specification and notified the Product Engineering team, it goes back into the DataCite product workflow. Following the schema changes, a technical specification is developed to support the new schema changes for relevant DataCite services.