Minutes for Mercian Metadata Special Interest Group 'End of Year Meeting'

22 January 2020, Leicester University, 10:00 – 13:00

Present: Richard Birley (Birmingham City University), Christina Claridge (Birmingham University), Jane Faux (Newman University), Sandy Foster (Coventry University), Louise Goodall (Leicester University), Gaz Johnson (Mercian Collaboration), Corinne Lambert (Leicester University), William Peaden (Aston University), Sally Rimmer (Derby University), Masniza Sore (University of Northampton), Owen Thomas (De Montfort University), Gaby Travill (University of Northampton), Nick Williams (University of Nottingham).

NB: footnotes originally attached to agenda are included here for clarity.

1. Apologies
Galen Jones (Open University), Sue Ackermann (University of Nottingham), Helen Smith (Harper Adams), Ed Kirkland (Warwick University).

2. Welcome
Given by WP. Presented agenda.

3. Minutes
Minutes of the previous meeting were approved.

4. Reflections and feedback
4.1: Future of cataloguing
Overall feedback was positive and participants would use the format again with a different topic. Specific comments included: CL thought we may have tried to include too much especially as some of the questions were so broad and SL highlighted the need for participants to be able to demonstrate concrete outcomes to their managers. WP will feed these comments back to MDG, as they intend to collate the outcome from the three future of cataloguing meetings already held (in Edinburgh, Birmingham & London) in order to present the conclusions to the cataloguing community.

Action: All – we would welcome suggestions for future World Café events.

4.2: Jisc plan M contribution
There hasn't been a lot of activity so far. Have looked at NBK in terms of data rights and sharing data with a focus on ensuring licence holders get paid. Have also looked at 'fit for purpose' records (work being carried out by Emma Booth at Manchester University). They have met with directors and issues with costs was discussed. WP will continue as the MMG representative on this group.

4.3: E-forum and the platform
WP gave an overview of the e-forum on legacy metadata. Overall, it felt quite intense/pressured and any future forum would need to be better planned with defined breaks and pre populated threads. There was general agreement that the online forum was easier than discussing via email both in terms of managing individual participation and archiving contributions. We can also continue to discuss after the event. It was agreed that we would continue with the e-forum but in the future rather than focussing on a day we could stretch the discussion over a week. NW stressed the need for topics to be distributed well in advance.

4.4: Overall impression of MMG so far
WP asked if anyone thought that the MMG had missed/ignored anything during its first year. The consensus in the room was no and that the work of the group had been worthwhile. A regular number of Metadata related events have been held in the Mercian region that wouldn't have been

without the work of the group. GJ raised the point that there had been positive feedback on the group, particularly its level of activity, from Directors within the Mercian Collaboration. This is important as it demonstrates that we have achieved one of our stated goals in raising awareness of our work to the director level within our respective institutions.

4.5: RDA orientation day (December 2019)
Although this was really a CILIP MDG event it was co badged by MMG and MMG members helped organise and host it and a number of colleagues from Mercian Collaboration affiliated institutions attended. While it was noted that this wasn't an introductory session, as quite a high level of understanding re RDA was required to fully benefit from the day (e.g. Gordon Dunsire's comment that the changes to RDA 'are not really that different' was questioned, as were the issues with mapping new RDA developments to MARC), those that attended thought it was worthwhile, particularly in helping develop a better understanding to the changes in RDA, and the MMG would like to emulate the format of the day (see below).

5. Membership to group and representation[i]
GJ raised the question of how we wanted the membership of the group to be represented/reflected on the Mercian Collaboration website. Did we want a lead for each institution or just the core committee members? GJ also stressed the potential for personal recognition within your institution from involvement with the Mercian Collaboration SIGs. Given the potentially broad range of roles/individuals that/who work with metadata in each institution it was agreed that, where possible, we would continue with a named representative for each institution but anyone within the Mercian Collaboration with an interest in metadata is welcome/encouraged to attend our events.

Finally, GJ introduced, and explained the role of, Sue Ackermann (Library Director at the University of Nottingham) who is now MMG's sponsor within the Collaboration.

Action: anyone wanting their institution to be added to, or have their institutions representative updated on, the MMG webpage should contact GJ on the mailing list. [Thank you to everyone who has already sent GJ their information and thank you to GJ for updating the page so quickly].

6. Electing posts
No nominations were received in advance of the meeting and no one present volunteered to take up a post therefore it was agreed, rather informally, that the 'management' of the group would continue as is with WP and RJB as co-chairs and EK as secretary. WP raised the question of creating a new post of forum moderator. If, as discussed, the group begins to make more use of the online forum created in October last year (see: https://mercianmetadatagroup.createaforum.com) it would be beneficial if there was additional help to moderate contributions and aid discussion. If anyone wishes to volunteer for this work please contact WP, as the forum 'owner', directly.
6.1 Chair, Co-chair
See above.
6.2 Secretary
See above.
6.3 Forum moderator
See above.

7. Year plan
7a. Future Events
7a 1: RIMMF Jane-athon[ii]
Given the success of the MDG event in December (see above) it was agreed that we should move forward with our original proposal for MMG to hold a RIMMF event. To continue the Mercian theme it was agreed that George Eliot (born in Nuneaton) would be our focus for the day. With this in mind, CC suggested that we contact the George Eliot Fellowship for some light relief during the day (see: https://www.georgeeliot.org).

One lesson learnt from the December meeting was the need to prepare data (as an R-BALL) in advance. By removing the 'mechanical step' of having to create author and work data we can focus on creating data for manifestations and looking at how the R-tree works.

Actions:
WP to ask UKCoR about access to the RDA Toolkit on the training day.
WP to investigate Aston University as a potential venue. [Completed – WP has secured a PC suite at Aston that contains laptops which overcomes any issues colleagues not issued with work laptops may have had].
WP to identify date - midweek in early June proposed. [Completed – WP has distributed two proposed dates in June (16th & 18th) via the mailing list].
Committee to prepare documentation (R-BALL, RIMMF crib sheet, etc.) at least two weeks before event.

7a 2: E-forum?[iii]
With the aim of holding one per quarter suggestions for future e-forums were requested. It was also suggested that alerts should be set up in advance of each e-forum as a reminder. The following suggestions were made:
- Shelf ready: e.g. establishing shelf ready; 'teething problems'; experience with suppliers (this was referred back to the previous discussion on 'fit for purpose' data).
- The practical management of supplier data (e.g. using MarcEdit).
- Oddities: CC suggested a forum on dealing with the numerous issues that arise when looking at non-standard items (e.g. rarely used standards, integrating resources, three-dimensional artefacts, music (RDA templates), serials, special collections, repositories and so on). There was some discussion on whether this was a wider discussion that could be taken up on an ad hoc basis with a specific area on the e-forum or a single Q&A session.

Actions:
All – volunteers are required for preparing future e-forums.
WP to send message to MDG re their 'show & tell' feature in Catalogue and Index re further suggestions.
WP to add additional threads reflecting the suggestions above to the e-forum homepage so that we can continue this discussion, and share best practice suggestions, between meetings. [Completed – WP created additional threads 27 January].

7b. Training
7b. 1: MarcEdit/OpenRefine[iv]
Sally Rimmer's proposal for the MMG to provide some training around the use/application of MarcEdit (using the example of WHELF's training day see: http://whelf.ac.uk/marcedit-openrefine-training-day/) was warmly received with general agreement that MMG should provide training opportunities for MarcEdit and Regular Expressions. In the meantime everyone was encouraged to make use of Terry Reese's webpage and related forums and mailing lists.

Action: committee to explore holding a MarcEdit training day. The consensus was for a very introductory type event with participants being aware of their LMS's normalisation rules in advance. It was suggested that the day be split in two with an introductory 'show & tell' session in the morning run by MMG members using examples from their own work/institutions. This would be followed by a more advanced session on Regular Expressions in the afternoon with an invited 'expert' (Owen Stephens was suggested if available/affordable).

7b 2: RDA training/LRM + UKCoR (The UK Committee on RDA) requests
WP reported that there had been a lukewarm response from the cataloguing community to UKCoR's offer to provide RDA training. Jenny Wright (UKCoR/BDS) has stated they are happy to do events but need to know what people 'want' from them.

Actions:
It was agreed that we could combine an update on RDA with the proposed RIMMF event (see above). Date to be agreed.
WP will act as our representative to the committee and feedback comments, suggestions, etc.

8. Other items
8.1: NACO Funnel[v]
WP reported that at a MDG meeting in December Paul Shackleton (OCLC) had raised the question of why there isn't a process nationally for committees/institutions to feed into NACO name authority files. For example, given the difficulties of managing common Welsh surnames (e.g. Jones, Evans, Griffiths) WHELF are investigating becoming a 'funnel' for Wales. With this in mind the question of whether the MMG could also become a regional 'funnel' was posed. Individuals would have to be trained and then feed back to the British Library. After some discussion it became clear that there needs to be further investigation before the MMG can make a decision either way. There were general concerns about how time consuming this could be and the lack of a clear model of how it would work. The British Library's focus on/preference for ISNI (International Standard Name Identifier) was also raised as a potential concern.

8.2: Mercian co-badged events
GJ raised this point in relation to the MDG RIMMF event held at BCU in December. An issue arose due to some concerns over a possible conflict of interest as Mercian Collaboration events are always free (in practice it doesn't have any mechanism for charging for events). GJ explained that although the Collaboration supports cross-collaboration with outside partners the following basic questions must be answered in advance: 'who leads, who pays and who gets the money'. Although the Steering Committee were satisfied that in this case the event was not advertised as a Collaboration event and there were no costs to any of the affiliated institutions, as this hadn't happened before they are exploring how to make co-badged events easier to manage in the future. GJ stated that money is available for external speakers but requests will be reviewed in a case by case manner.

9. E-forum outcomes
The outcomes from October's e-forum weren't restricted to the question of legacy data.

9.1: Fit for purpose metadata[vi]
There was some discussion around what 'fit for purpose' means (e.g. what 'level' of cataloguing, what does 'good quality' mean), which circled back to the earlier discussion on Plan M. Raising the question, could we, as a group, provide regional pressure (through consortia we are members of) on suppliers by, for example, requesting a guarantee that records are of a sufficient standard? Or lobbying on the issue of data licences (the survey being conducted by NAG is a separate issue to the licencing questions related to NBK). Essentially, as representatives of publically funded institutions we should be ensuring we get what we want, and are paying for, from our suppliers. Where is our money going?

So what are we asking for? Basic information such as, accurate information in the correct MARC field; records that are not machine generated; coding should be what we requested and follow agreed standards (UTF-8, MARC21, etc.); should contain a physical description and subject headings; free records? All of this is central to our work because it is linked to how we support the user experience. Coding in MARC strongly influences our discovery layers and we should be able to tie

suppliers down on the question of which standards they are using and how they are 'interpreting' them.

Action: WP to raise issues with Task and Finish group for metadata at NBK.

9.2: Decolonising the subject index[vii]
There was some lively debate around this issue led by CC who described how they had resolved an issue with an inappropriate subject heading in their collection. The discussion was largely focussed on subject headings but it was reported that Helen Williams at LSE was investigating DDC's 'European view of the world' and those present agreed that the way in which we classify items was also potentially problematic.

The discussion can be summarised as follows:
- Recognising 'bad' subject headings. Focus is on supporting BAME patrons but there are numerous examples in other areas (e.g. gender, sexuality) and, for example, geographically specific terms (e.g. in UK we have 'trade unions' not 'labor unions').
- What alternatives are there to LoC? FAST is now a full service rather than a project and flexible enough to link new headings to existing ones. Would it be possible to create a Mercian index that could then input into a national scheme/project? Consensus was that while FAST's independence from LoC makes it worthwhile to pursue further the mechanism of how headings are created, etc. is still unclear. We need to improve our understanding of how FAST 'works'. Perhaps a start would be noting headings we think are problematic and begin thinking about alternatives. A list of these could be added to the e-forum.
- CC posed two useful questions for us to consider when we start thinking about this: 'what are we fixing'? Should we be fixing it'? Obviously, this discussion goes far beyond the Mercian Collaboration so should we be looking at national rather than local solutions?
- This is not a quick 'win'. Changes will take time to embed themselves in our collections.
- GJ reminded us that the Mercian Staff Development Group are holding a meeting in Leicester, June 16, Decolonising Academic Libraries, which currently doesn't have a metadata element included in the agenda. This highlights the fact that conversations re decolonisation in other library areas (e.g. collection management, information literacy & curriculum development) often forget about the role resources, classification and cataloguing play in enhancing the user experience.

Action: WP to approach the Staff Development Group with a view to attending/contributing to the event in June. [Completed – WP sent initial enquiry 23 January to Kate Towlson & Keith Nockles. Holding email received, we are still awaiting a more detailed response].

Action: WP to create additional thread to e-forum homepage so that we can continue this discussion, and share best practice suggestions, between meetings. [Completed – WP created additional threads 27 January. CC shared LoC video via mailing list 24 January].

10. AOB

From CC: as a group do we need to take a view on Bibframe? For example, we may be questioned by senior management in relation to this. Consensus was that MMG should keep a watching brief. As NW commented the key issue is that, unlike in the past, a cataloguing standard has been developed before the technology exists to realise it in practice (although Bibframe records can be viewed in Alma). Hence the difference of opinion between the British Library and Library of Congress on Bibframe re its incompatibility with RDA.

From CC: is MMG interested in working out how FAST works in more detail? Is there a position paper?

Action: WP will approach Alan Danksin (British Library) for clarification.

From all: it was agreed that it would be beneficial to future discussions/projects if we compiled a list of the 'systems' each of use (LMS/LSP, discovery platforms & ERMs, etc.).

Action: please send your lists to RJB who will compile them and make them available via the e-forum or website, to be confirmed. **Deadline:** ASAP.

From RJB: suggestion that we should discuss our experiences with Jisc's NBK with the aim of helping create some 'best practice' guidelines for those joining the project.

CL and LG were thanked for hosting the meeting and the informative tour of the University's library that followed.

RJB 11/2/2020

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[i] There are members in the Jisc email list who are not present on the MMG website. Gaz says:

> "I've not updated the 'Committee' website though, as I'm not sure how closely this now matches the membership of the list. For other groups (with the exception of the RDMSG) list/committee are one and the same."

Do we want everyone listed who is on the email list, or a "core committee"? RJB: preference would be a core committee, as the nature of the group means that 'membership'/attendance will shift depending on what the current focus is.

[ii] Following the success of the UKCoR/MDG event on 11th December we could offer a much more basic session with a RBALL created and distributed in advance.
[iii] E-book management shared best practice; Repository metadata; Special collections
[iv] http://whelf.ac.uk/marcedit-openrefine-training-day/

Proposed by Sally Rimmer. Could we run a MarcEdit training day using expertise within the collaboration? Could we bring practical problems to the day which are "solved" as these are concrete things we do every day.

[v] MDG are currently discussing the possibility of a NACO funnel for the UK. WHELF are looking at the costings for doing this work in Wales. The NBK system supports possible creation of national authority records. Is it time to have a national contribution to NAG? Debbie Lee wrote on this in 2012: https://archive.cilip.org.uk/sites/default/files/documents/Catalogue%20and%20Index%20issue%20169%2C%20De cember%202012.pdf

The BL is currently focused on inserting ISNI as authority control markers and working with publishers to do this. Could the collaboration work on this in collaboration?

[vi] Jisc's plan M includes a strand for understanding what metadata is necessary to make our records fit for purpose. Can the collaboration come up with a scheme for metadata that would largely suit HE organisations in our region? We probably need to define clearly what our "purpose" is in order to answer what metadata we need to meet this.

[vii] This issue has a national interest and import. FAST headings are now a service and not a project and there is a group that is looking at extending the FAST vocabulary. This group feels it is time to break from the bonds of LCSH and there is no reason why it cannot extent the scope of FAST to do this. We would need to investigate the hesitations some (e.g. Birmingham University?) in the MMG have with FAST.