



## Special Interest Subgroup: The Mercian Metadata Group

### Background

Following discussions at CILIP's Cataloguing & Indexing Group 2018 conference colleagues from Aston University (WP) and Birmingham City University (RJB) identified a shared need within the Midlands for support around the creation and management of metadata.

The library landscape has changed dramatically over the last decade with in-house cataloguing largely being replaced by suppliers' data. The 'traditional' role of the cataloguer has been replaced by that of the metadata specialist, which encompasses a broad range of disciplines, knowledge and challenges. This has refocused how we, as a community, think about our everyday practice. While we remain committed to improving the discoverability of our institution's resources, and recognise that metadata is at the heart of successfully achieving this, there are key areas (e.g. data quality, the adoption and promotion of new standards) where sharing existing expertise and experience would be beneficial to both our individual institutions and the sector in the Midlands in general. For example, given that, the majority of metadata specialists are lone workers or working in small teams we, and the collections/resources we manage, would benefit from the availability of additional mutual, and cost effective, peer-to-peer support and a shared framework.

To gauge support for this proposal and concretise core areas of concern/action a planning meeting was held at Birmingham City University (28 February 2019). Invitations were sent to all 23 Mercian Collaboration members with 17 delegates representing 15 institutions attending. There was full agreement amongst those present with the proposal that, as metadata crosses a number of disciplines/roles within our institutions, it would be beneficial to have a forum dedicated to improving and promoting metadata practice within the region. Suggestions for future activity were also made and a Mercian JISC mailing list has been created.

### Group Remit/ Outline Terms of Reference

The Group aims to achieve amongst its members a shared vision for metadata provision in a range of areas, including traditional bibliographic data, institutional repositories, digital archives and any other areas where metadata skills and expertise may be leveraged. Key areas for professional collaboration include:

- Shared best practice and shared knowledge
- Professional standards/framework
- Common approaches
- Training
- Establishing ethical standards

Initial steps to reach these goals are:

- One annual face-to-face meeting of members
- Shared email list for members only
- Directed e-forums 3 times a year (or when required)



- Focussed events/training days on a given metadata topic
- Training or events run by experts within or external to the Mercian Collaboration

### Relationship to Strategic Aims

Given that metadata underpins the library community's core activities it would be possible to align the Group's work with all seven of the Mercian Collaboration's key strategic aims. That said, as the core three themes of the matrix, Environment, Workforce Development and Agency, "*underscore and underwrite all other considerations for the Collaboration's future configuration*"<sup>1</sup>, we will focus on these. We hope that the Group's commitment to the enhancement of the UX agenda, collection development and research is self-evident from the comments made throughout this proposal.

- Environment: the Group aims to provide opportunities to navigate the complex 'world of information' in which the Collaboration and its members operate. In relation to our aims this would mean identifying and proposing solutions in response to national, and international, developments in the creation and management of metadata and analysing how these impact on our institution's, and the sector as a whole, ability to provide efficiencies for accurate metadata support. For example, the forthcoming changes to the RDA Toolkit have the potential to impact on our workflows and ultimately the user experience. RDM is another area that faces similar challenges.
- Workplace development: the group aims to create a forum that enables the "*expansion of the knowledge capital embodied by the collective Collaboration members' staff*". Whether this be through upskilling or reskilling, we will "*explore approaches which can develop pools of experience and skill across the Collaboration. In this way, expertise potentially becomes a distributed expense and resource, which may be drawn upon by the membership, and not solely those organisations employing specific individuals*". This is particularly valuable in a specialised area of information work that is under-resourced in terms of staffing and where external training is relatively limited and expensive.
- Agency: The Group aims to become the 'voice' in the region for the discussion and promotion of best practice in the field of metadata. By being able to form and distribute opinions locally, we hope to influence the environment in which we operate. Essentially, this means enhancing the "*ability of the Collaboration to speak with a collective voice to other national and international bodies on issues of import and impact*", whether these be professional organisations (e.g. CIG, RDA Steering Committee) or commercial suppliers of metadata.

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<sup>1</sup> All citations from: Johnson, Gareth. (2019) Preparing for the Future: The Mercian Collaboration Strategic Plan 2019-2023 (Draft version).



### Proposed Membership

It is proposed that the Group's membership will include representatives from all of the Mercian Institutions. This is necessary to ensure inclusivity and we would invite Directors to nominate a representative from their Institution, where one does not currently exist.

We recognise that Membership will consist of staff beyond the 'traditional' cataloguing community and would encourage staff whose role and level of interest matches the issues covered by the Group's remit to participate in its work. This is to acknowledge the diversity of roles within the library community who have a professional interest in metadata, to increase the potential benefits (e.g. in terms of workforce development, agency and identifying changes within the sector) of the Group to the participating institutions and, again, to ensure inclusivity.

Primary communication will be via the [mercian-metadata@jiscmail.ac.uk](mailto:mercian-metadata@jiscmail.ac.uk) list. Membership of this list is open to any Mercian Collaboration member with an interest in metadata.

### Governance & Committee

Alongside a sponsor from the Mercian Steering Group, the Group would initially run with three posts:

- Chair
- Vice-chair
- Secretary

Will Peaden and Richard Birley will act in the Chair and Vice position to get the Group running. Once the Group is established and has been active for a year these positions would be open to a vote following an initial review of the Group's functioning. This is to ensure that the Group is meeting its aims and that its structure is effective and meets the needs of both the Group and the Mercian Collaboration. In the longer term, it is envisaged that the terms of office would be for a standard 2-year period.

A secretary for minute taking at meetings will need to be found.

### Next Steps

Should the Group be agreed the shared email for those in the membership and designated others, e.g. colleagues, would be used to begin collaborating and as an open forum for discussion. Another meeting around autumn of 2019 would be arranged to begin flesh out the ideas proposed in this document.

The Group has several ideas for projects, events or topics for shared experience agreed by the meeting on 28<sup>th</sup>. All of these are the kinds of events we would want to see and join in.

- I. 3R training – the RDA toolkit will be re-launched after the completion of the RSC 3R project. The new RDA toolkit and RDA structure will need to be embedded into our metadata workflows.



2. Jane-athon. Connected to 3R training is a Jane-athon (<http://rballs.info/topics/p/jane/janeathon.html>) this is something the RSC itself is interested in promoting
3. Shared template/application profile: A Mercian level application profile for the new 3R toolkit, or some shared cataloguing templates for special collections.
4. Ebook management shared experience: possible e-forum or event
5. Repository metadata/compliance standards: possible e-forum or event
6. Free open access collections: shared practice for treatment, metadata standards
7. Legacy metadata: how to deal with this, improve it, make it do more work. Possible e-forum or event
8. NBK and record provenance: Clear up issues around record licences, vendor metadata and metadata sharing
9. Special collections cataloguing: shared experience (linked back to RDA, application profiles etc.)

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