

Collection Management & Jisc Bibliographic Data Services: arrangements for advisory and strategic oversight

This briefing paper outlines new developments in the provision of strategic oversight, advice and community representation to Jisc, in the areas of bibliographic data services and collection management. In addition, facilitation of a professional community of practice in these areas is also discussed. The paper reflects the content of a presentation by Ruth Elder announcing these developments at 'Collection Management: share the experience @ Bristol' 2nd February 2016.

Background

The Copac Collection Management Tools Project Board successfully steered the CCM Tools project from inception to the point in early 2016 when the tools were made widely available to libraries. It is therefore an appropriate time to review the name and purpose of the group, and to discuss the ongoing value of a continued role for the group with a focus on Collection Management. The Board feel that there is a role moving forward to support and facilitate the sharing of good practice, the development of a skills base and in capturing requirements for future services and tools, including further development of the CCM Tools. The intention is not to regard the CCM Tools as the 'preferred' tool over alternative offerings but to regard it as one of a number of potential products that the community might find useful.

Jisc Collection Management Community Advisory Board (CMCAB)

The new name of the group reflects a broadening scope and purpose as outlined above. The Board has helped to instigate and support two Collection Management community events (@York and @Bristol) and looks to facilitate the building of a professional community for Collection Management as we move forward.

Members of the Board are as follows:

Jo Aitkins (University of Leicester);
Sandra Bracegirdle (University of Manchester);
Shirley Cousins (Jisc);
Ruth Elder (University of York);
Neil Grindley (Jisc);
Stuart Hunt (University of Bristol);
Thalia Knight (Royal College of Surgeons of England);
Diana Massam (Jisc);
Jane Saunders (University of Leeds);
Gary Ward (University of Sheffield);
Christine Wise CHAIR (SOAS).

The Board has adopted revised Terms of Reference (appended to this paper) which encompass this broader scope and which also make reference to working with other appropriate bodies working in this area. One of the group's strengths is that the members span a range of roles, encompassing senior managerial roles and collection management practitioners. This allows the group to examine issues from different perspectives and increases the authority of the advice and recommendations that Jisc and others can then take away and act upon.

Bibliographic Data Oversight Group (BIBDOG)

This strategic level bibliographic data governance/ownership group has recently been formed in response to a recommendation from a report commissioned by Jisc last year which was directed to explore approaches to optimising the value of aggregation of library bibliographic data. A summary of the report is available:

(http://repository.jisc.ac.uk/6333/1/BD-NMS_Sero_BSI_report_summary_next_steps.docx).

Members of the group are: Neil Grindley (Head of Resource Discovery, Jisc); Paola Marchionni (Head of Digital Resources for teaching, learning and research, Jisc); David Prosser (Executive Director, RLUK); John Tuck (Member of Executive Board, SCONUL); Neil Wilson (Head of Collection Metadata, British Library); Christine Wise (Assistant Director, Research Library Services, SOAS and Chair of CMCAB).

The group first met in November 2015, and a series of meetings is scheduled through 2016. Its overarching aim is to oversee the implementation of solutions in the area of bibliographic data and the management of monographs and other types of academic book. It builds on the recommendations set out in the National Monograph Strategy which was published by Jisc in September 2014.

The purpose of BIBDOG is set out in its terms of reference as follows:

Aims and Objectives

The group offers the opportunity for Jisc, RLUK, SCONUL, the British Library (and potentially other relevant organisations) to collaboratively plan BD-NMS (Bibliographic Data – National Monograph Strategy) initiatives and to collectively devise future proposals for investment that build on current work.

The aim of the group is to ensure that all the investments that Jisc and other stakeholder organisations make (in the BD-NMS area) are based on sound requirements; are driven by the needs of the education, research and skills sectors; and are not duplicative or at odds with other existing or planned initiatives.

The invitation extended to the Chair of CMCAB to participate on the BIBDOG group is a practical measure to ensure that the needs of the emerging library collection management community are strongly represented and that the two groups are well-coordinated and joined-up. The nature of the discussions within and between the groups should be communicated to the wider community via suitable means such as the LIS-COLLECTION-MGMT list, the BD-NMS blog, the CCM blog, SCONUL/RLUK newsletters.

Collaboration

We see a potential role for the Jisc Collection Management Community Advisory Board to advise both Jisc and BIBDOG on the development of collection management and bibliographic data services for the library community. The Board would provide advice based on practitioner experience and tactical considerations whereas BIBDOG would operate at a more strategic level.

So – as a practical example – through the work of the CCM Tools, we have had discussions about the best approach to marking catalogue records to identify stock for retention or preservation. Discussions are focused around the use of the 583 field. There is currently no kind of authority role to endorse (or not) this action, or to encourage or lead a specific use of the field in a collaborative manner which will be beneficial to the CM community.

Through endorsement of the standards, processes, and workflows that are specified as part of the national level solutions that BIBDOG is charged with overseeing, it can effectively provide a validation and leadership role for the community. It can also use its influential and extensive member and strategic partner networks to advocate for emerging best practice. This will require good communication from BIBDOG with the sector and effective information exchange between BIBDOG and more tactical groups, such as CM CAB, which will ensure that its advocacy is underpinned by solid practitioner knowledge and sector requirements.

Feedback

We are interested to hear responses to this concept of creating what is effectively a collection management community advisory group. Our aim is to provide input to developments, based on the needs and requirements of the professional community. Through engagement and communication with BIBDOG in regard to CM issues in general and particularly in regard to moving the NMS strategy forward, we want to ensure practitioners' views are heard.

Please let us know your thoughts by joining the discussion on the **lis-collection-mgmt** email list.

Jisc Collection Management Community Advisory Board

May 2016

Appendix

See below for Terms of Reference.

Terms of Reference

Jisc Collection Management Community Advisory Board

These Terms of Reference have been developed as part of a review of the role and purpose of the Copac Collection Management Tools Project Board. The Board successfully steered the CCM Tools project from inception to the point in early 2016 when the Tools were made widely available to libraries. Thus it is now an appropriate time to review the name, purpose and role of the group as the operating context changes.

The name of the group has been changed to:

Jisc Collection Management Community Advisory Board (Jisc CMCAB)

Role and purpose

- To advise Jisc on the development of collection management services for the library community
- To actively provide feedback and comment on service proposals and developments
- To represent the views of the community in the development of services and activities
- To support and facilitate the development of a community of collection management professionals in the UK in order to share good practice, develop a skills base and capture requirements for future services
- To act as advocates for the development of a cooperative approach to the management of monograph collections and bibliographic data
- To work in partnership with other groups (such as Jisc's Bibliographic Data Oversight Group, BIBDOG) to ensure that strategic developments are informed by community needs. This will be facilitated by the CMCAB Chair joining BIBDOG.
- To encourage awareness of strategic and service developments in the community

Membership

- Membership is by invitation and is open to senior collection management practitioners and managers, appropriate Jisc staff and representatives of relevant community or professional organisations who wish to support the aims of the Board
- Period of membership is not restricted and is dependent on individual members' preference. It is preferred that those members standing down from the Board provide 3 months' notice of their departure.

Review

- The Board will review the relevance/value of its work and terms of reference annually

Working arrangements

- Board meetings will be held approximately 3 times per year. Additional meetings may be called depending on activity and consultation required over a given period
- Meetings will be organised by Jisc staff who will also be responsible for generating and circulating the agenda and papers, in consultation with the Chair and other members as required. Notes and actions will be produced and circulated following meetings by Jisc staff
- Outputs from the Board will be publicised to the wider community via appropriate blogs and email lists
e.g. LIS-COLLECTION-MGMT@Jiscmail.co.uk
- The Chair will be appointed by invitation with the approval of the Board
- Non-members may be invited to attend meetings on an ad-hoc basis as required
- Reasonable travel expenses for attendance at meetings will be reimbursed by Jisc if required
- An email distribution list will be used (CCM-BOARD@Jiscmail.ac.uk) to facilitate communication between Board members and to circulate official papers and documents as required. This list will be managed by Jisc staff. All Board members will remain as subscribers to this list for the duration of their membership