Library Management & Bibliographic Data Services Advisory Group

6 December 2017

11:00 – 15:15, Jisc, Meeting Room 2, Brettenham House, London

Papers

A: Terms of Reference

B: FOLIO overview

C: NBK Update: Issues arising and questions

D: New Jisc initiatives for collection management and discovery

E: Library strategy: priorities for 2018 – 19

Attendees

Alison Urquhart AU

Ann Rossiter AR

Christine Wise CW

Dave Puplett DPu

David Prosser DPr

David Summers DS

Joy Palmer JP

Liam Earney LE

Mark Hughes MH

Mark Toole (Chair) MT

Neil Grindley NG

Neil Wilson NWi

Nick Woolley NWo

Richard Parsons RP

Ross MacIntyre RM

Siobhán Burke SB

Apologies

Anna Franca King’s College London (maternity leave)

Paola Marchionni Jisc - see item 2. Paola is stepping down to be replaced by Dave Puplett

Chris Keene Jisc

Frances Boyle Imperial College London

Actions

1. AU to make corrections to minutes and update membership list on TOR - **Completed**
2. SB to re-send Sero recommendations paper (previously sent in July) – **Emailed to the group 06/12/17**
3. NG to continue discussions with OCLC regarding data reuse
4. NG to contact Dutch consortium re advice on pragmatic outcomes for Community Data Groups
5. LE to investigate if Jisc can do work on CrossRef click through for DOI
6. SB to take feedback about management of single sign on back to project team.
7. JP - Jisc need better messages for account managers to share on TLSS
8. AR and JP to discuss how to work together on SCONUL workforce development
9. JP to take forward design of CNI/library meeting in July.
10. SB to share Wiki link for details of Library Management Software systems with the group - HELibTech by Ken Chad. <http://helibtech.com/Home>
11. JP and LE to redraft papers following feedback and before sharing; in particular LE’s paper in relation to NBK Monographs
12. SB to share presentation slides with the group by email - **Completed**
13. SB/JP to move forward issues with communications as raised in the meeting

Agenda/Notes

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| Item | Activity |
| 1 | **Welcome and introductions for new members**  Attendees introduced themselves, their roles and institution. |
| 2 | **Apologies, minutes and actions of the last meeting (Paper A & B)**  It was noted that Paola Marchionni has stepped down and Dave Puplett was welcomed as a new member of the group.  The number of Jisc members in the group was raised for AOB  Corrections to the minutes: page 3 change “board” to “FOLIO product council”  OCLA to OCLC  Action: AU to correct minutes  **Matters arising**  Action: SB to resend Sero recommendations paper  TOR document updated following recommendations of last meeting. Action: Membership list to be updated to reflect recent changes by AU  Subject to these corrections, the group accepted the updated TOR.  **Declarations of interest**  Ross declared he is now a member of the Folio board |
| 3 | **NBK Update: Issues arising and questions (Paper C)**  NG delivered an update on the NBK project.  **Summary of presentation:** Jisc is working with OCLC to deliver NBK. A good working relationship has been established but OCLC has been surprised by the complexity of the data. This has led to some delays in data loading. There also appears to be a technical problem with the deduplication process which OCLC is struggling to resolve. Most milestones due so far have been completed. Master record model configuration is ongoing. Milestone 9 (WorldCat configuration) has highlighted the need to realign OCLC and Jisc priorities with a focus primarily on NBK rather than W0rldCat. Data loading has not progressed as fast as anticipated due to data complexity menti0ned above but also issues around data sharing which has made some institutions hesitant to provide their data. New libraries are contributing to NBK that were never part of Copac which is excellent. Also, data from non UK sources e.g. HathiTrust data has been added (the data that is available for reuse). There is a Beta test interface (which was demonstrated) to allow contributing institutions to check their data.  The three questions from the paper were then discussed by the group:  **Q1: If we are unable to meet the stated targets for datasets loaded onto the system for January 2018 (or July 2018) - how should we assess that sufficient progress is still being made so that the NBK retains the endorsement of the community?**  Summary of discussion:   * The project is complex and delays might be expected * Was there a plan to overcome obstacles? Is there a narrative around delays to improve acceptance from the community? * A pragmatic approach to data quality needed (balance between gold standard and accept anything) * Members of the group were not surprised that OCLC were finding the data more complex than they expected - but *were* surprised that they were not using their global expertise to rise to the challenge – there may be a lack of knowledge exchange internally across OCLC * NG noted that Copac staff were transferring technical knowledge to OCLC to help them. * OCLC have escalated deduplicating issues internally. * It is anticipated that as knowledge exchange continues, the speed of data uploading will improve. * Data rights is a significant bottleneck with suppliers of data like BDS (and potentially Dawson) limiting their data use to discovery only within NBK (and not record download) as it is claimed that it may affect their business model. * A discussion took place on the possibility of a “national deal” with regards to the data but there were concerns about the ratchetting of costs if a monopoly was created. * Short term solution: Limit data for discovery only for those with concerns (like in Copac) and statements on terms of use listed on the NBK website. This would allay contributors’ concerns and hopefully increase the release of data fr0m institutions. * A discussion took place regarding risk and who would be liable if data was used inappropriately. Jisc legal advice is that Jisc will accept a measure of risk if there are procedures in place e.g. reasonable steps taken and take down policy in place but Jisc cannot accept all responsibility. * NWo: If contractual obligations and agreements required, would put libraries off signing up. Institutions are very risk averse. A light touch is required. * A discussion arose over the value of OCLC membership for contributing institutions to allow them voting rights to influence OCLC policy. NG stated that NBK is the focus at present but that conversations with OCLC needed to take place regarding data rights.   **Q2: How might we best exploit the value of the ‘Community Data Groups’ and ensure that activity is joined up with other sector initiatives?**  The recommendations from the White Rose report: “Understanding Collections Overlap” were mentioned by DPr.  NG: Plan to bring in groups (with the aid of a small amount of Jisc funding) between Feb and July to look at:   * data quality * how to serve data back to the community * What would a toolkit contain?   CW: The Collection Management Community Advisory Board (CMCAB) have done work on CCM tools in the past. A good opportunity to link there. A helpful initiative we should all get involved with.  MH: Groups could help form common templates/minimum standards  The risk of data quality blocking the progress of the project was noted (avoid seeking the “holy grail”)  NWo: We should focus on enhancing discovery  FP: A Dutch consortium are doing similar work – what can we learn from them?  NG said that Jisc had been in touch with the Dutch but he would contact them again to seek advice on setting pragmatic outcomes for groups. (Action)  DPr: RLUK would be happy to endorse any standard coming out of the groups if that would be helpful  **Q3: In what ways can we improve communications about the NBK to enhance prospects for success?**  NG reported that NBK were in a better place re comms now that Graham Brown was in place. Input from Northern Collaboration suggested that Jisc has been focusing too exclusively on benefits to one type of institution.  DPu: The name NBK does not tell you what the service does.  JP: Jisc are modelling new use cases for UX. We don’t want a name that defines the NBK’s role when this could change.  AH: What is the long term goal?  MT: Who is the target audience?  FP: There is currently no visibility beyond libraries. What message do we want to get across and why? Don’t overlook getting library managers to position this in their institution.  JP: We are moving from a service view to a journey/outcomes view. We need to know what tools will be needed before we brand.  FP: Having a name and a brand can help start discussions. |
| 4 | **LE: New Jisc initiatives for collection management and discovery (Paper D)**  At the last meeting we discussed being wary of putting libraries in a silo away from research. OA discovery is an important area and Jisc has been trying to bring these things together.  Plan B: Based on experience of major negotiations, institutions have expressed a desire to see mechanisms implemented that not only support a strong negotiating position, but allow institutions to exit the deal and still have access to essential content.  Such a decision is reliant on detailed knowledge of the impact on access, entitlements, availability of OA versions etc and should ideally be available for all negotiations at the outset, rather than only in the event of disagreement. Jisc is currently investigating the infrastructure that would be required to allow institutions either individually or as part of the consortium to understand the costs and benefits of exiting agreements and what proportion of a publisher’s portfolio the institution could access (and at what cost) from alternative sources, should they choose to exit the agreement. Jisc will provide institutions with details and costs of such a service and should there be sufficient demand put forward a business case for investment for 2018-2019.  **Members were invited to DISCUSS the approaches and priorities for Jisc service development**  **Infrastructure Supporting Negotiations**  AR: The scope and ambition are good. Please don’t call it plan B. There is a danger of publishers raising their prices to make the “big deals” the only affordable options. LE noted that this was already happening among publishers.  AH: With budget constraints as they are, when libraries reach the point of cancellation, the discussion may finally change.  AR: Librarians need support to say no to pressures to retain content.  NWo: Due to big deals we are used to providing discovery in a certain way. There needs to be a change of model e.g. don’t pay if they are opened for only a brief period of time. There is still huge potential to improve ILL.  RP: Publishers are ahead of the game. We are moving to a post OA world. We do not have data on inflationary increases, content change or the value provided by different publishers.  LE: We need to understand where we are. Some institutions need to be able to say, I like the deal I have but we want to be able to offer all the options.  AH: Libraries need evidence to make decisions about cancellations.  Joy: This would be expanding on the BI (Business Intelligence) tools that Jisc provide to make the case or not for Big deals.  Discussion on ILL. MT: Any direct cost comparisons need to take staff time and cost into consideration for ILL.  LE: Data on ILL will be in there to help decision making rather than there being a focus on ILL. We need a granular understanding of the current situation. Our aim is to empower institutions.  DPr: Would enable institutions to know if they can walk away from a big deal.  **OA Discovery**  AH: We need to think boldly about discovery services. Definitely need CORE as part of LMS.  LE: Many discovery services have a problem with OA discovery – needs to be “switched on” in some way. Lots of OA stuff does not get found when people search.  AH: CORE is not well known. Repository people are less involved in discovery.  NWo: If people find OA articles in Google Scholar but not the LMS discovery system, they won’t go back to the LMS – we need to improve discovery.  Discussion about CrossRef click through data for DOI – NWo proposed that someone should do more work in this area.  LE: Someone at Jisc could perhaps look at this? (Action)  **NBK Monographs**  There was a discussion around the proposals and the implications for institutions. Jisc was asked to consider the diversity of institutional requirements and re-draft the paper to clarify that this was considered as a potential set of services in support of decision making and discovery. |
| 5 | **Update on the Transforming Library Support Services (TLSS) programme**  SB reported back on the progress of the TLSS programme.  The vision of TLSS is to align Jisc services with library workflows and for them to work with library systems. Lots of work done internally to position ourselves to deliver the programme. Programme management process in place with escalation routes established.  Four themes: User Experience (UX), Single Sign on, Common infrastructure, data model.  In terms of user experience, there will be a phased approach with phase 1 focusing on library management services due to defined library roles and overlap of service use.  Primarily Jisc Collections, KB+ and JUSP and to some extent NBK and CCM Tools. It was noted that using the term library management services could prove confusing to members of the sector. SB acknowledged this and said that it was internal terminology to Jisc only. JP stated that we use the term library support services but Jisc agreed that we need to look at our messaging.  This work is linking into a redevelopment of the Jisc Collection website. UX work (by external consultants) for this will feed into the programme as a whole.  Jisc Login has been adopted as the single sign-on solution and is already being used for the My Jisc service. Preferred proposal by the single sign-on project team is that management of this would be done by institutions. However there was general concern about this proposal and it was agreed that this would be fed back to the project team.  Action: This feedback to be taken back by SB to the Jisc Login project.  Data orchestration: working with Cetis to help with data modelling and pre-procurement research on a data management system. Internally, we are also co-ordinating with other areas of Jisc. Have held an “organisation” data workshop to agree shared service requirements.  Programme risks: Managing business as usual and change simultaneously. The problem of scope creep.  Success: Service teams now approaching the transformation programme from a functionality point of view rather than from their individual services.  DPr: Can we support this in any way?  RM: We will come back for advice on the best authoritative sources of data later in the project.  SB: Can communication be improved?  There was general agreement that the work could and should be publicised.  JP: Graham Brown will be involved  FP/AH: IT managers will need marketing to as the Jisc bill lands on their desk.  JP: Action: Need better messages for account managers to share. |
| 6 | **Library strategy: priorities for 2018 – 19 (Paper E)**  JP: Jisc is developing a 3-5 year strategy looking at new areas of innovation and development. Two areas to seek advice on: **Could learning analytics be used to create personalised library experiences? How much focus should be placed on discovery innovation?**  CW: Qu: What feedback came from the co-creation/design event? (<https://www.jisc.ac.uk/events/co-creating-the-future-london-23-nov-2017>) How does this feed in?  JP: The event focussed on student attrition and not much on discovery. Futures are looking at next generation learning environments and learning analytics.  DPr: Personalised reading lists for students fed into LMSs  RM: Progress on this was being made but now Talis want to charge for it.  FP: During the LAMP project there was an agreement with Talis. Where is this up to? The Jisc Learning Analytics team will also be doing an onsite visit as part of their roll out.  FP: 2 areas of focus: better understanding of how students succeed – this should include library engagement data. Also, individual student learning journeys.  JP: Lots more data now available since LAMP and new ways to visualise it (tableau). We are in a position now to ask more what if questions.  NWo: Personalisation is important. Students see themselves almost as customers and want a personalised service. Access management is still poor and the level of understanding of proxy is poor.  MT: We need to be able to feed data into one place for it to be brought together.  JP: (Summarising the discussion): So the key points are:   * Don’t distribute personalisation data into silos * Focus on personalisation e.g. reading lists * Provide analytics tools   Note that the Jisc learning analytics is in *beta* phase. If going down the analytics route, we need to make libraries part of a whole.  NWo: Has anyone been talking to Turnitin? (good source of valuable outputs – may be more effective than measuring e.g. clicks on VLE)  LE: Yes, Jisc are talking to them  MT: The key users of learning analytics are students to manage their own learning journeys, so the visualisation side is key.  JP: Question: **Is formal training required in data literacy/data driven discussions?**  AR: There is a need for modular training on these issues but budget is tight. Webinars and distance learning might be good.  FP: We need to build capacity in the sector as a whole, not just libraries. (That can’t be delivered through this programme)  JP: We will look at what Jisc is already doing in this area and see how it can be adjusted to meet these needs.  AH: There is a big gap in the understanding of data in order to make strategic decisions.  AR: SCONUL are doing workforce development. Action: AR and JP to discuss how we can work together on this.  FP: This is a sector strategic issue. Leadership Foundation and HEA have the remit to develop this.  AH: Going back to discovery, we should look at what we can do at scale due to the NBK that we otherwise could not do e.g. usage  JP (Summarising the discussion): No to training but yes to building communities of practice even though this is hard to put VSE (value, savings and efficiency) values against.  RP: We need to learn from those moving quickly in this area and using future technologies e.g. VR, AR, AI, etc.  LE: There is the CNI conference happening with a day aimed at library colleagues. Perhaps this can be used to look at the further horizon and emergent trends to impact libraries.  NWo: Would welcome looking at the innovative use of narrative stories to look at the idea of VRE in the 21st century. In addition, difficulties for institutions in acting as publishers.  DPr commented that the Jisc financial X ray was excellent.  JP: A libraries version being scoped. Perhaps the meeting with librarians after CNI could be dedicated to scoping this vision and working through some potential future state scenarios.  All: General agreement that this would be a good approach. Action: JP to take forward design of CNI/library meeting in July.  DPu noted from the document that shared library solutions were currently being scoped for FE and mentioned that this should be broadened to include HE. |
| 7. | **Folio Update**  RM: A board meeting took place in August in Boston MA, USA and another meeting in London with EBSCO, Index Data and Jisc in October. A Folio status update document was shared with the group that had been recently tweeted. (<https://www.folio.org/wp-content/uploads/2017/12/FOLIO-Status-update_Infographic_Interactive2-2.pdf>)  CW: The product council has had lots of recent developments and investment. Development of SIGs taking place e.g. reporting SIG looking at reports that can be produced from the system which is very open and community led. |
| 8. | **AOB**  RP noted it was hard to keep track of all the library systems and wondered if there was a definitive list. The group noted there was a Wiki for this. Action: SB to share HELibTech site link with the group.  **Sharing of documents from the meeting:**  Paper C: OK to share  Paper D: to be redrafted. Marked confidential  Paper E: To be amended and then can be shared  Action: JP and LE to redraft papers in light of comments  Action: Slides from presentations to be emailed to the group  Number of Jisc members in the group was discussed: It was felt that the number of Jisc members at the meeting had been OK due to each person making necessary contributions to the meeting.  A decision was taken to publish details of the LMBDSAG group, the TOR and minutes of the meeting on the TLSS blog. DPr noted that the community needed the ability to see what was happening and who was involved so that they could approach group members to offer feedback as needed. Action: AU to make this happen  The next meeting will take place in approximately 6 months’ time. |