Plan M

Aim

To implement a more efficient bibliographic metadata supply model for UK academic & specialist libraries using the Jisc NBK/Library Hub as core infrastructure

Objectives

1. To establish a fair and sustainable ‘pay to share’ bibliographic data ecosystem for UK academic and specialist libraries who are Jisc members and/or NBK contributors

2. To design a data supply chain that delivers ‘fit-for-purpose’ records as early as possible in the creation cycle.

3. To streamline workflows for libraries and suppliers to reduce duplication of effort across the community

4. To ensure that all records are available to all Jisc members and/or NBK contributors at the point of need with permissive licensing for sharing and re-use

5. To provide an infrastructure that allows institutions to easily acquire and then re-share enhanced records
Plan M

What problems will Plan M address?

<table>
<thead>
<tr>
<th>Practical</th>
<th>Strategic</th>
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<tbody>
<tr>
<td><strong>Misdirected effort</strong></td>
<td><strong>Fragmented Infrastructure</strong></td>
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<tr>
<td>Having to look in multiple places to find</td>
<td>Having multiple delivery mechanisms and</td>
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<tr>
<td>suitable records or creating records where a</td>
<td>different working practices is inefficient and</td>
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<tr>
<td>suitable one already exists</td>
<td>incoherent</td>
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<tr>
<td><strong>Duplicated effort</strong></td>
<td><strong>Uneconomic practices</strong></td>
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<td>Different organisations and suppliers making</td>
<td>Precious resources and investment are being</td>
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<td>the same or similar changes to a record</td>
<td>wasted</td>
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<td><strong>Unexploited value</strong></td>
<td><strong>Sectoral transformation inertia</strong></td>
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<tr>
<td>The inability to share enhanced records with</td>
<td>The focus of cataloguing practice needs to</td>
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<td>other organisations who may be able to</td>
<td>shift towards automation of routine</td>
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<tr>
<td>benefit from them</td>
<td>cataloguing and investment in special</td>
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<td></td>
<td>collections</td>
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Principles

Designing the ecosystem
- Sustainable
- Effective
- Efficient
- Open
- Collaborative

Doing the work
- Focus on need
- Keep it simple
- Choose practical options
Plan M

What is the Plan?

The actions required to meet the goal of plan M over the next 18 months

Action 1
To commission an exploration of the economic basis of the current ecosystem/market place and to work with a range of stakeholders to devise a realistic alternative economic model that will facilitate the Plan M objectives

Action 2
To convene designated stakeholders (Plan M Task & Finish Groups) to explore issues around: quality & standards; and appropriate licensing of data in a new data ecosystem.

Action 3
To negotiate and reach agreement with data creators and suppliers to support the new infrastructure and to realise the benefits of a more streamlined and sustainable data marketplace
The 3 areas of activity will be interactive and complementary.

Jisc will commission consultants with appropriate cost/value/benefits modelling expertise.

Task & Finish Groups have already been established and will input into the economic modelling work and inform negotiations.

Jisc Library Strategy and Library Hub Governance groups + RLUK/SCONUL Boards and committees will oversee decision-making.
Stakeholders

- **UK HE Libraries** (Directors, senior managers, collection managers, cataloguing teams)
- **UK National & Specialist Libraries** (British Library, NLS, NLW, Wellcome, Tate, etc.)
- **Data Suppliers** (BDS, OCLC, British Library, Library of Congress, Dawsons, Askews, Proquest, Nielsen, Capita, Ex Libris, etc.)
- **Library Suppliers** (Dawsons, Askews, Proquest, etc.)
- **Procurement & Licensing** (SUPC, Jisc Collections, National Acquisitions Group, etc.)
- **Infrastructure Providers** (Jisc, OCLC, British Library, etc.)
- **Publishers** (Bloomsbury, Emerald, Scholar Led Press, etc.)
- **Others** (ISBN, ISSN, ORCID, COPIM Project, etc.)
Next Steps

• Pitch Plan M internally within Jisc to secure short-term project funding to support the economic modelling work
• Set out a more detailed project plan for the next 18 months
• Establish a regular communication schedule with all stakeholders
• Commission the economic modelling work
• Set expectations, objectives and meeting schedule for the Task & Finish Groups
• Manage ongoing relationships with data and infrastructure suppliers and set expectations
• Elicit appropriate input from governance and advisory groups