UKSG Webinar

Plan M: the road ahead

Neil Grindley
Director of Content & Discovery Services
Jisc

Rosie Hare
Services Coordinator Library Hub
Jisc

nbk@jisc.ac.uk
Timeline

2014
National Monograph Strategy

2016
National Bibliographic Knowledgebase (NBK)

2019
Library Hub

Development

Remodelling the UK Library Data Marketplace
Plan M+

Metadata Workshops
Plan M

2021
New NBK System Model

Negotiation

2022
Jisc/OCLC (Transitional)
National Metadata Agreement

National Metadata Agreement
Community Consultation
Plan M (phase 1)
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>
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<tr>
<th>Practical</th>
<th>Strategic</th>
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<td><strong>Misdirected effort</strong></td>
<td><strong>Fragmented Infrastructure</strong></td>
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<td>Having to look in multiple places to find suitable records or creating records where a suitable one already exists</td>
<td>Having multiple delivery mechanisms and different working practices is inefficient and incoherent</td>
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<td><strong>Duplicated effort</strong></td>
<td><strong>Uneconomic practices</strong></td>
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<td>Different organisations and suppliers making the same or similar changes to a record</td>
<td>Precious resources and investment are being wasted</td>
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<td><strong>Unexploited value</strong></td>
<td><strong>Sectoral transformation inertia</strong></td>
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<td>The inability to share enhanced records with other organisations who may be able to benefit from them</td>
<td>The focus of cataloguing practice needs to shift towards automation of routine cataloguing and investment in special collections</td>
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Plan M – where next? 2022-2026
Four strands of Plan M strategy

• Data issues and quality.
• Engagement with publishers and third parties – where do we (Jisc) position ourselves within the ecosystem?
• Open Access Monographs and UKRI policy.
• Understanding workflows – case studies into acquisitions workflows in our member libraries.
Data issues and quality

- Push better records in Library Hub Cataloguing where records we receive are brief or fields are missing.
- Ability to gather preferences for records in Contributor dashboard.
- Further exploring linked data and how we can link to other Jisc systems, e.g. Archives Hub.
- ED&I work with collections and data – collaborative work that links the strands of strategy together.
OCLC Transitional National Metadata Agreement 2021-2022

This agreement covers metadata download and synchronization services from OCLC for a transitional period. It provides access for subscribing institutions to full, unabridged OCLC cataloguing records via the Library Hub Cataloguing service as well as eligibility to directly access the OCLC WorldCat Cataloguing service. In addition, the data from subscribing institution libraries will be eligible for synchronization to OCLC WorldCat, (subject to OCLC quality criteria) either via the NBK or directly. Those eligible to subscribe are: Jisc members and/or those institutions who contribute data to the Jisc National Bibliographic Knowledgebase.

_supplier: OCLC (UK) Limited  
1st Aug 2021 - 31st Jul 2022  
_standard VAT
Engagement with publishers and third parties
Engagement with publishers and third parties

• Next phase of National Metadata Agreement with OCLC
• Work with other publishers and suppliers about getting collections of records into the National Bibliographic Knowledgebase.
• BDS – Academic Library Licence. Continuing conversations with Jisc.
• Understanding international models of data sharing and where Plan M work can contribute and collaborate.
Open Access Monographs and UKRI policy
OA Monographs and UKRI policy

• All outputs of UKRI funded research need to be publicly available via Open Access. Will apply to monographs, book chapters and edited collections published on or after 1 January 2024.

• Getting more Open Access Data into Library Hub.

• Library Hub team involvement with COPIM project – 2022-23.

• Jisc OA Monographs project plan. NBK as core infrastructure for metadata.
Understanding Workflows
Understanding workflows – a call to action for our members

• Figuring out where Jisc member libraries need help or advice with streamlining their metadata workflows.

• Links with work around data quality, Equality, Diversity and Inclusion work, as well as informing our engagement with third parties and publishers.

• Call to action – Success of Plan M will be collaborative between Jisc, the academic and research library community and other stakeholders working together. We would love to hear from you!
Thank you – any questions?