The Metadata Team: Making an Impact at the University of Kent

Robin Armstrong Viner, Head of Collection Management, Information Services, University of Kent

# Introduction

Founded 1965, the University of Kent is a research led University with 19,275 students and 3,152 staff based at campuses in Canterbury and Medway and centres in Athens, Brussels, Paris, Rome and Tonbridge. Multi-disciplinary in nature the University has 3 faculties comprising 18 academic schools and 3 academic centres. Top 10 for overall student satisfaction in the National Student Survey 2013 the University was 28th in the *2014 Complete University Guide,* 20th in the *Guardian University Guide 2014* and 24th in the UK for world-leading (4\*) research Research Assessment Exercise (RAE) 2008;

Information Services (IS) is a converged service comprising Customer Support, Library Collections, IT Development and Planning & Administration providing libraries in Canterbury, Medway and Tonbridge. IS is the custodian of a number of special collections, including the British Cartoon Archive, and works in partnership with Canterbury Cathedral Library and Rochester Cathedral Library.

I joined the University as Head of Collection Management in August 2011. Prior to this my background was in academic libraries and professional associations including as Cataloguing Manager at the University of Aberdeen and Manager – Content & Information Architecture at the Royal Institution of Chartered Surveyors. (RICS) I have been a member of the CILIP Cataloguing & Indexing Group Committee since 2009 and was elected Chair this year. However I should stress that the views expressed in this article are my own and not necessarily those of the University or CIG.

This article also reflects that I have a particular approach to the challenges facing metadata teams and the wider information profession, although I respect the views of others who may disagree with me. I usually describe myself as a glass half-full person, but in doing so acknowledge that it could be fuller of something nicer. Finally I would say that although I have high aspirations I can’t claim to be living the dream – yet!

# The Challenge

The challenges facing the Metadata team at the University were, and remain, many and varied. Like all libraries the expectations of our students, staff and wider community of users are increasing. The drivers behind this are complex and ever changing but there was, and continues to be, a clear need to respond to them in order to ensure not only the ongoing value of the library but also the positive profile of IS and ranking of the University.

Our response was focused in four key areas:

* Building additional capacity to cope with growing volumes and diversity of materials requiring description;
* Improving existing services to match user expectations;
* Introducing new services to demonstrate continuing and growing value to the University;
* Maintaining quality to ensure a consistently excellent user experience.

Working with the IS Senior Management team, I was keen to ensure that our approach:

* Leveraged the professional expertise of the Metadata team;
* Built on and developed those existing skills;
* Empowered the both team and individuals within it.

# The Opportunity

While the challenge was daunting there were significant opportunities. There was, and remains, a clear commitment from the University in its strategic plan to:

* Offer an inspiring student experience;
* Produce innovative world leading research;
* Operate in an effective, efficient and sustainable and professional manner.

IS matched this commitment with its own a vision of the University:

*With knowledge exchange and stimulation of creativity at its heart, where our community enjoys convenient and effective access to information and technology, and where we all work, learn and collaborate how and when it suits us, wherever we may be.*

Seeking to:

*Provide leadership, expertise and outstanding services, which empower our University community to exploit knowledge, information and technology to achieve excellence in all our research, teaching, learning, enterprise and business activity.*

And:

*Be a transparent, accountable and sustainable organisation where professionalism, open-mindedness and pro-activity help us anticipate and respond to the diverse needs of the University community and support and develop our own staff. We are able to achieve our objectives by being inclusive, customer focused, proactive, innovative, flexible and responsible.*

A clear IS Strategy, a challenging but achievable IS Operational Plan, an effective governance framework providing both oversight and support and a rigorous project management methodology set the tone. The IS Senior Management team appetite for (appropriately managed) risk and understanding of the need for change management created a positive culture for development. Finally a brilliant team enabled us to take forward an ambitious and transformational programme.

# The Programme

That programme was a 3 year shelf-ready strategy simplifying, streamlining and improving our internal processes, and developing our strategic relationships with the private sector, for purchasing and providing access to library materials to:

* Improve service
*Making newly purchased items available to library users as soon as possible;*
* Ensure sustainability
*Providing a flexible model that allows us make newly purchased items available within the same timescales regardless of the number of orders submitted or items delivered;*
* Enhance data quality
*Ensuring our bibliographic data supports: enrichment with cover images, previews and tables of content; searching and suggestions within the catalogue;*
* Deliver cost and efficiency savings
*Enabling us to redeploy IS staff time currently used to catalogue, classify and process newly purchased items to focus on priority areas which will improve the student experience and support research.*

# The Objectives

We developed a set of user-centred objectives for the programme, outlining how it would respond to the University and IS strategic plans by:

* Improve the service offered to library users by making newly purchased items available as soon as possible
*Reducing the time taken to make an item available by 50%;*
* Improve the service offered to library users by RFID tagging all items in the Templeman Main Collection
*Making it easier and quicker to borrow and return items via the self-issue machines, to locate misplaced items, and to identify missing items which should be replaced;*
* Improve the service offered to library users by increasing the quality of the catalogue data
*Ensuring all items at the Templeman and Tonbridge Centre Libraries are discoverable through our resource discovery tools and linked by consistent classification, names and subjects
Using shared services as a source of data that can be used to effectively and efficiently link University systems and support further shared services; outsourcing this work to reduce the cost by 98%, ensure that this project is completed, and that it is completed in a shorter timescale than would otherwise be possible;*
* Introduce standard classification for all new Core Text and Main Collection items at the Templeman and Tonbridge Centre Libraries
*Maximising the cost effectiveness of outsourcing cataloguing, classification and processing of newly purchased items;*
* Introduce shelf-ready services for new items purchased from our principal suppliers at the Templeman and Tonbridge Centre Libraries
*Realising the benefits of releasing a minimum of 2 FTEs of IS staff time and reducing the cost of making an item available by 50%;*
* Reclassify the Templeman Core Text and Main Collections in line with standard classification where appropriate
*Outsourcing this work to reduce the cost by a minimum of 33%, ensure that this project was completed, and that it is completed in a shorter timescale than would otherwise be possible*
* Improve the quality of the catalogue data
*Using shared services as a source of data that can be used to effectively and efficiently link University systems and support further shared services; outsourcing this work to reduce the cost by 98%, ensure that this project was completed, and that it was completed in a shorter timescale than would otherwise be possible*

# The Projects

We identified four projects that would deliver the objectives of the shelf-ready strategy:

1. Establish Standard Classification
*A series of meetings between key stakeholders within IS agreed the use of standard Library of Congress Classification with existing local practice for cutters*.
2. Introduce Shelf Ready Stock
*This brought representatives from the Academic Liaison Services, Acquisitions, Learning & Research Systems Development and Metadata teams together with sales and technical teams from two book suppliers to develop an order process whereby:*
	1. *Orders are placed on the supplier website, the supplier providing basic bibliographic and order records which are loaded overnight into the library management system for confirmation;*
	2. *The supplier provides full invoice and bibliographic records which are loaded into the library management system on receipt of the items.*
3. Reclassify and RFID tag the Core Text and Main Collection at the Templeman and Tonbridge Centre Libraries
*This saw the Lending Services, Metadata and Stock Control teams partnering with an external contractor to undertake this major 7 month project ensuring that no item was unavailable for more than 24 hours.*
4. Develop Quality Control for Catalogue Data
*Through this project the Metadata team developed a new exception-based model for ensuring the accuracy and consistency of the library catalogue working at collection level to avoid the need to check individual items, prioritising and scheduling their interventions to minimise disruption to library users and maximise impact.*

# The Outcomes

The shelf-ready strategy has had a significant impact on the user experience. Urgent items now reach the shelves within 1 working day of receipt, with all other new purchased items being made available within 5 working days of receipt, halving the previously estimated average of 10 working days. Current cataloguing backlogs have been eliminated, from an estimated 5,000 items, while significant progress is being made on providing metadata for previously undiscoverable special collections.

Library users are also benefiting from 681,117 upgraded bibliographic records. Enhancements delivered include the:

* Adoption of Standard Library of Congress Classification facilitating browsing and retrieval;
* Addition of appropriate RDA field;
* Expansion of abbreviations and replacement of Latin terms in line with RDA;
* Introduction of authority control for names and subject headings ensuring consistency and providing appropriate cross references;
* Correction of fixed field data, indicators and subfield codes improving display and retrieval.

The newly established framework for ongoing quality control have provided a matrix of reports and documented workflows to address known issues, scoped and prioritised according to impact on users and achievability.

Library users will see further benefit from the shelf-ready strategy following the launch of LibrarySearch, the University’s discovery layer, in January 2015. Testing by both users and the project team has demonstrated both that our metadata effectively supports the features of the system and that many of the issues with metadata experienced by other libraries have been addressed.

Less visible to library users is the work associated with the reclassification (in itself a measure of the projects success) which saw:

* 407,805 items RFID-tagged;
* 287,993 items reclassified;
* 500,593 items moved;
* 54,235 items previously undiscoverable made discoverable.

# The Impact

The impact of the shelf-ready strategy lead by the Metadata team extends beyond the outcomes I have highlighted centred around the improved discoverability of, access to and management of the collections to include. The scalable and sustainable workflows introduced have allowed the team to provide metadata records for a growing volume of acquisitions. There was as 25% increase in additions to stock in 2011-12 and a further 12% rise in 2012-13.

There has also been a significant impact for the Metadata team. Previously accustomed to a permanent state of crisis management the team has seen a reduction in complaints in the form of requests for unavailable items and is now focused on the delivery of value-added services. In addition to a growing focus on the University’s unique and distinctive collections, the team have active involvement a broad range of internal and external projects and initiatives including:

* Cataloguing to archival standards, including materials for the British Cartoon Archive;
* Responsibility for Kent Academic Repository (KAR) metadata, including that used to support academic promotions and for the deposit of research theses;
* Creating metadata profiles for the Kent Research Information Management System Online (KRIMSON) including that required for integration with KAR;
* Exploring the metadata requirements associated with research data management and funder reporting.

All of these have seen the Metadata team developing and demonstrating new skills, building on and complementing our core professional competencies.

# The Future

A key indicator of the impact of the Metadata team is the current IS Operation Plan. This identifies the team as central to 21 (15%) of the projects listed. The team are planning to be involved in a further 11 projects on the IS Library Collections 2014-17 Roadmaps, under the strategic priority resources, for:

* Partnerships, Equality & Diversity
*Exploring partnership and collaboration, procurement, unified resource management and volunteering strategies;*
* Learning & Teaching
*Examining active collection management;*
* Scholarly Support
*Enabling data exploitation;*
* Special Collections
*Leading digital asset management, digitisation and unique collection highlighting
Supporting accreditation and publishing;*

Through these and other projects the Metadata team will harness their (and IS’) growing relationships with other IS teams, academic and professional service departments, regional partners, funders and consortia. This will see the team honing their skills to:

* Exploit library resources, management information and research data to deliver business intelligence;
* Play an active and leading role in areas relevant to our expertise.
* Build on our reputation for success and continue to:
* Develop new services for our users;
* Add value for the University and our communities;

And most importantly to continue to make an impact.