
Sustainability through change

The British Library Collection Metadata
Strategy 2023 – 2030

Summary

“Our vision is that the Library’s collection metadata assets will be integrated on a coherent sustainable, standards-based infrastructure offering improved options for productivity, access, collaboration and open reuse”

Sustainability through change is the British Library’s third Collection Metadata Strategy and covers the period 2023-2030. *Sustainability through change* aims to fulfil the vision articulated by its predecessors, *Unlocking the value*, and *Foundations for the future* for access, collaboration and reuse.

Collection metadata remains a key organisational asset, representing centuries of investment by the Library. Delivery of the Library’s core purposes, strategies and portfolios is underpinned by the efficient exploitation and stewardship of collection metadata.

Despite progress delivered by previous strategies, the key challenges remain:

- Integration of the Library’s collection metadata in an infrastructure that is both scalable and sustainable
- Managing the increasing volume and complexity of metadata
- Revealing hidden metadata
- Enhancing legacy metadata to remove barriers to discovery
- Developing and rewarding staff for their work

The following priorities provide continuity with the Library’s previous strategy, *Living Knowledge*, and the vision expressed by the current strategy, *Knowledge Matters: the British Library 2023-2030*.ⁱ

- **Delivering core purposes**
- **Opening our metadata and removing barriers to access**
- **Enabling our people**

Purpose

Sustainability through change is the Library's third Collection Metadata Strategy and covers the period 2023-2030. Its predecessors, *Unlocking the Value*, and *Foundations for the future*, established the principles, priorities and governance needed to manage the Library's collection metadata assets and laid the groundwork for replacement of legacy systems and migration of metadata to an integrated, coherent architecture. *Sustainability through change* emphasises both the maintenance of core services during a period of profound technical, social and economic change, and the opportunities arising from new systems, standards and technologies to deliver robust, responsive services to users by inculcating a culture of change.

Like its predecessors, the new strategy will be supplemented by annual implementation plans covering the actions necessary to address legacy issues, support current business needs and achieve future goals.

Context

Collection Metadata as a Strategic Asset

The Library's 'Collection metadata' has evolved from a basic inventory listing to encompass all the structured information required to discover and access the collection across multiple channels, and to manage, and preserve the collection. It is therefore a key organisational asset, representing centuries of resource investment. Delivery of the Library's core purposes, strategies and portfolios is underpinned by the efficient exploitation and stewardship of collection metadata.

Our first collection metadata strategy was primarily concerned with establishing centralised management and support of metadata in order to spread best practice and develop new capabilities. Achievements since 2015 include:

- Automated workflows enabling legal deposit eBook metadata to be processed and upgraded to library standards at scale whilst minimizing manual intervention
- Migration of metadata from legacy platforms to strategic repositories
- Tools to convert legacy print catalogues to contemporary library metadata formats and to automatically enhance over 6 million legacy catalogue records
- Open metadata service options used by over 2000 institutions in 130 countries and compliant with international standards, and Government and community expectations
- Securing investment to reduce backlogs and replace aging metadata systems.

Following stakeholder consultation, the third strategy will build on these achievements and, in collaboration with relevant programmes, seek to deliver an integrated infrastructure for collection metadata. This will inevitably require some compromises arising from balancing short and longer-term goals. However, only through convergence on a standards based, integrated approach to collection metadata management will it be possible to support the Library's strategic ambitions in an affordable and sustainable manner.

In 2025, the Library will celebrate the 75th Anniversary of the *British National Bibliography*, which has documented the published output of the United Kingdom every week since January 1950.

Strategic Challenges

The period covered will see the Library facing several key metadata management challenges.

Integrating Collection Metadata Infrastructure

The Library's ability to integrate its metadata continues to be constrained by legacy infrastructure and aging systems.

This requires that we:

- invest in new systems and business processes, capable of supporting coherent resource discovery;
- integrate and standardise metadata for collection management; innovate and collaborate.

Volume and complexity of metadata

The capacity of digital technologies to produce, replicate and repackage content has created huge challenges for those agencies responsible for its description. Traditional methods of metadata generation, management and dissemination are neither scalable nor necessarily aligned with audience expectations.

Our Future Cataloguing project will address these issues by:

- shifting our quality focus from assessing inputs to delivering effective outcomes for users
- re-evaluating our interventions
- assessing more permissive approaches to sources of metadata

Hidden Collection Assets

Funding has been obtained to enable unprocessed or otherwise “hidden” collection items to be catalogued and made available to users.

Maintaining and Developing the Value of Collection Metadata Assets

Our metadata reflects the language, conventions and assumptions of the periods during which it was created.

Our collections are for everyone and we will work in collaboration with curatorial colleagues and the wider community to ensure our metadata is equally inclusive.

Sharing and Maintaining Best Practice

Communication – The success of the Strategy will rely on adoption and maintenance of best practice by staff across the Library. To encourage this process, case studies will be developed and shared showing how agreed standards, policies and best practice help to deliver service and workflow efficiencies. All documentation supporting the strategy will be available via a dedicated area on the Library Wiki.

Staff Development – In order to support the continuous improvement of metadata assets, it will be essential to find ways for staff to undertake skills development and participate in knowledge sharing networks with internal and external colleagues. We must identify development needs and offer both formal training and informal opportunities for professional staff development and skills maintenance.

Smart Working – Workflows and working practices will be adapted in response to these challenges and the lessons learned will inform the Smart Working strategy and planning for the effective occupation of spaces released by Boston Spa Renewed.

Strategic Focus

Strategic Priorities 2023-2030

In order to address the challenges described above, the 2023-2030 Collection Metadata Strategy will focus on the opportunity offered by replacement of ageing collection management systems with an integrated collection metadata infrastructure. Specific activities will be determined by the following priorities.

<p>Delivering core purposes</p>	<ul style="list-style-type: none"> • Cataloguing new collection items acquired by UK legal deposit, purchase and donation • Transition to the Library Services Platform (LSP) to reduce operational complexity, <i>e.g. scoping, business process improvement, metadata migration, migration of Sound & Vision metadata to Aleph</i> • Future Cataloguing: adapting our metadata sources, description levels and practices, <i>e.g. re-use of non-English language cataloguing; outcomes based Quality Assurance Metadata Measure</i> • Developing and maintaining innovative collection metadata creation and enhancement processes to support efficient exploitation of data sources, tools and methodologies <i>e.g. automated entity extraction from full text, crowdsourcing and bulk record enhancement; integrating learning from Living with machines.</i>
<p>Opening our metadata and removing barriers to access</p>	<ul style="list-style-type: none"> • Unlocking hidden collections by ensuring collection metadata is available in strategic metadata repositories and for resource discovery, <i>e.g. uncatalogued material, printed catalogues, crowdsourcing projects</i> • Increasing opportunities for interaction with our collection metadata in a range of discovery channels and technologies, to showcase the richness of the collection and its relevance to all, <i>e.g. linked data applications, such as Share-VDE, migration of researcher datasets, Catalogue Bridge development</i> • Implementing Race Equality Action Plan (REAP) recommendations by adopting more inclusive descriptive practices, <i>e.g. implementing ethical metadata guidelines, and more flexible application of subject vocabularies</i> • Developing Authority Control Strategy, to improve navigation and discovery across collections, <i>e.g. integration of ISNI into collection metadata assets and processes</i> • Improving subject access, by increasing capacity and extending coverage to legacy metadata, <i>e.g. FAST implementation, mapping projects, and investigating use of foreign language headings</i>
<p>Enabling our people</p>	<ul style="list-style-type: none"> • Develop metadata roles through opportunities for career progression, integrated training & continuing professional development, supporting apprenticeship and work experience programmes, <i>e.g. opportunities to participate in project work, shadowing and mentoring</i> • Introduce blended approach to learning: by developing and streamlining training workflows and content, <i>e.g. the Library's learning platform, the LearningHub, and other training and development tools</i> • Provide an inclusive, participative, learning environment to suit a variety of skills, knowledge and capabilities • Celebrate our successes by sharing communications and promoting events, <i>e.g. 75th Anniversary of the British National Bibliography (BNB) in 2025, Metadata Matters newsletter, Monthly Highlights bulletin</i>

Delivering the Strategy

Governance & Support

The governance structure responsible for ensuring that the Collection Metadata strategy is delivered comprises three groups:

- **The Collection Metadata Strategy Group (CMSG)** - an SLT-led group chaired by the Director of Collection Management.
- **The Collection Metadata Advisory Group (CMAG)** - an expert group with representation from collection areas across the Library responsible for advising the CMSG on technical issues and chaired by the Collection Metadata Standards Manager (Collection Metadata)

- **The Collection Metadata Implementation Group (CMIG)** (Previously Collection Metadata Processing Group) - a group responsible for monitoring implementation and resolving operational metadata issues in line with the Metadata Strategy and chaired by the Head of Metadata

In addition, the Collection Metadata Team (*in Collection Management*) has responsibility for supporting activities required to deliver the Strategy.

Implementation

Sustainability through change covers a longer time span than previous strategies, which makes it problematic to predict all aspects of implementation. The high-level delivery objectives include:

<p>Medium Term Objectives 2023-2026</p>	<ul style="list-style-type: none"> • Catalogue collection items acquired • LSP migration and business change • Deliver Hidden Collections project • Deliver REAP pilot project for Metadata and Provenance Research (M&PR) • Transition to RDA Official Toolkit • Develop Authority Control Strategy • Deliver Future Cataloguing project outcomes • IAMS stabilisation • Collaborate with People team to develop metadata roles • Collaborate with Digital Research to develop enhanced digital workflows • Implement <i>Catalogue Bridge Review</i> recommendations • Review of long term objectives • Effective occupation of buildings released by Boston Spa Renewed
<p>2023/24</p>	<ul style="list-style-type: none"> • Catalogue collection items <ul style="list-style-type: none"> ○ Boston Spa Backlog reduction phase 1 ○ Archiving and cataloguing official publications • Transition to the Library Services Platform: scoping, planning, configuration and migration. Project strands will be supported in line with agreed Project deadlines. <ul style="list-style-type: none"> ○ Preparation and transformation of SAMI data for migration to Aleph ○ Migration of specialist catalogues (RPS, ESTC) • Revealing Hidden Collections: <ul style="list-style-type: none"> ○ Delivery of tranche 1 Projects • REAP Metadata & Provenance Research Pilot Project: Year 1 objectives <ul style="list-style-type: none"> ○ Application of Content Guidance • Implementation of RDA Official Toolkit • Develop Authority Control Strategy • Future Cataloguing Task Forces • Increasing opportunities for interaction with our collection metadata <ul style="list-style-type: none"> ○ BNB as linked data on Share-VDE implementation ○ Implementation of recommendations for Catalogue Bridge (1)

	<ul style="list-style-type: none"> ○ Learning from and applying outcomes from <i>Living with machines</i> ○ Conceive and promote R&D Challenges in collaboration with Digital Research ● Improving subject access <ul style="list-style-type: none"> ○ Extend FAST Training ● Develop metadata roles <ul style="list-style-type: none"> ○ Smart cataloguing pilot in collaboration with People team ○ XSLT Community of Practice established in collaboration with Technology ○ RDA Official Toolkit implementation ○ SAMI/Aleph business process transition and training ○ Introduce blended approach to learning
2024/25	<ul style="list-style-type: none"> ● Catalogue collection items <ul style="list-style-type: none"> ○ Boston Spa Backlog reduction phase 2 ● Transition to the Library Services Platform: <ul style="list-style-type: none"> ○ Load of SAMI metadata to Aleph ● Revealing Hidden Collections: <ul style="list-style-type: none"> ○ Delivery of tranche 2 Projects ● REAP Metadata & Provenance Research Pilot Project: Year 2 objectives <ul style="list-style-type: none"> ○ Subject terminology ● Improving subject access <ul style="list-style-type: none"> ○ Extend FAST application ● Increasing opportunities for interaction with our collection metadata <ul style="list-style-type: none"> ○ BL catalogue data added to Share-VDE ○ Implementation of recommendations for Catalogue Bridge (2) ● Celebrate our successes <ul style="list-style-type: none"> ○ 75th Anniversary of BNB (January 2025)
2025/26	<ul style="list-style-type: none"> ● Catalogue collection items <ul style="list-style-type: none"> ○ Boston Spa Backlog reduction phase 3 ● Transition to the Library Services Platform: <ul style="list-style-type: none"> ○ LSP Migration ● Revealing Hidden Collections: <ul style="list-style-type: none"> ○ Delivery of tranche 3 Projects ● REAP Metadata & Provenance Research Pilot Project: Year 3 objectives <ul style="list-style-type: none"> ○ Transition to BAU, future priorities, lessons learned ● Increasing opportunities for interaction with our collection metadata <ul style="list-style-type: none"> ○ Implementation of recommendations for Catalogue Bridge (3)
Long term objectives 2026-2030	<ul style="list-style-type: none"> ● Collaboration with Content and Research Services, Digital Research, and Technology to improve effectiveness of metadata for discovery ● Realization of linked data benefits from Share-VDE ● Rollout of REAP across the collection ● Implementing/developing LSP ● Archives and MSS system development/replacement (2027-)

Throughout

- **Collection Metadata systems, standards and business process harmonization and convergence** – will be supported to enable delivery of the Library Services Platform, Unified Digital Repository, Discovery Services Roadmap
- **Specific metadata development requirements for projects and operational efficiencies** will have to be balanced with delivery of strategic priorities

- **Engagement and representation to support the maintenance, development and adoption of key metadata standards** (e.g. RDA, ISNI, ISSN, etc.)
- **Government data initiatives will be implemented** in line with public sector polices and best practice (e.g. open public data, data privacy, etc.)
- **Key strategic metadata collaborations will be supported** (e.g. JISC National Bibliographic Knowledgebase, UK Research Reserve, LibraryOn (Single Digital Presence), etc.)
- **Staff awareness of best practice and efficiency** for the creation and exploitation of metadata will be improved
- **Inadequate collection metadata will be made fit for purpose** and migrated to new systems in line with corporate priorities via targeted automated or manual interventions
- **The Library’s open metadata services portfolio** will be further enhanced and extended

Metrics

Suitable metrics enable the effectiveness of the strategy to be measured and are supplemented by an annual audit reporting the current state of the Library’s metadata assets.

Communications

We will continue to maintain a comprehensive range of communications with external stakeholders:

Maintenance of a set of public Collection Metadata web pages

A centralised British Library email support function for collection metadata queries

Continuing development of the Collection Metadata Wiki as a central staff resource for dissemination of best practice.

Use of social media to provide updates on progress

Presentations at external events or to external organisations to disseminate information about the Strategy, best practice and new services & invite collaborations

Glossary

Term	Definition and Scope
Boston Spa Renewed	Redevelopment of the Boston Spa site to deliver increased storage capacity and enhanced staff accommodation.
Catalogue Bridge	A suite of bespoke British Library tools called Catalogue Bridge utilities, used to manage metadata products and services.
Collection Metadata	‘Collection metadata’ is an umbrella term for the metadata used to: manage, access, preserve and describe the collection.
ESTC	ESTC (English Short Title Catalogue) is a union catalogue which contains records of holdings in more than 2000 libraries world-wide, including the British Library.
FAST	FAST (Faceted Application of Subject Terminology) was designed as a subject system for Web applications, derived from the Library of Congress Subject Headings (LCSH). FAST is a better fit with current discovery systems and user expectations than string-based indexing systems.
Hidden Metadata	Collection metadata that is unavailable to someone to whom it would be of value. Hidden metadata includes printed catalogues; local databases that cannot be accessed through the discovery layer; metadata encoded in a specialised schema or format; metadata that is subject to restrictions on reuse or distribution.
IAMS	Integrated Archives and Manuscripts System

Term	Definition and Scope
ISNI	ISNI (International Standard Name Identifier) is the ISO certified global standard number for identifying the millions of contributors to creative works and those active in their distribution, including researchers, inventors, writers, artists, visual creators, performers, producers, publishers, aggregators, and more.
Legacy Metadata	Inherited metadata that is not capable of satisfying use cases. Legacy metadata includes metadata that is being used for purposes for which it was never intended; metadata that has been converted from a printed format to a machine-readable format; metadata that is not compatible with current standards. These categories are not mutually exclusive.
Metadata	Structured information that describes, explains, locates, or otherwise makes it easier to retrieve, use, or manage an information resource.
Open Data	Data that is made available by organisations, businesses and individuals for anyone to access, use and share.
Race Equality Action Plan (REAP)	The Race Equality Action Plan (REAP) includes a three-year pilot project aiming to develop sustainable workflows for inclusive description and discovery, as well as to undertake provenance research to improve the knowledge of the history of our collections and to make that information available.
RDA	RDA: Resource Description and Access is a package of data elements, guidelines, and instructions for creating library and cultural heritage resource metadata that is well-formed according to international models for user-focused linked data applications.
RPS	RPS (Register of Preservation Surrogates) is a catalogue of printed book and music titles on archival microform. It covers texts from all periods and languages with the exception of those in Oriental and Arabic scripts (Russian, Greek and Hebrew works have transliterated entries).
SAMI	Sound and Moving Image Catalogue
Share-VDE (now Share Family)	Virtual Discovery Environment developed collaboratively to explore applications of linked data technology for discovery and re-use.
XSLT	Extensible Stylesheet Language Transformations

ⁱ Knowledge Matters: the British Library strategy 2023-2030 is available for [download](#) as PDF.