

BIC PRODUCT DATA EXCELLENCE AWARD (PDEA) ACCREDITATION SCHEME REVIEW TASK & FINISH WORKING GROUP – Minutes

Location: Penguin Random House, 20 Vauxhall Bridge Road, Pimlico, London SW1V 2SA

Date and time: Tuesday 13th March 2018, 2pm

Minutes taken by: Alaina-Marie Bassett

Present

Alaina-Marie Bassett, BIC
Graham Bell, EDItEUR
Clive Herbert, Nielsen
Lada Kriz, Penguin Random House (delegate)
Karina Luke, BIC
Alistair Mann, Hachette
Peter Mathews, Cambridge University Press
Chris Saynor, EDItEUR
Jack Tipping, Bowker
Gabrielle Wallington, Waterstones

Apologies

Kat Coveyduck, Virtuales Publishing Solutions
Nabiha Evans, Amazon
Jon Green, Bertram's
Will Harvey, Gardners
Andrew Henty, Virtuales Publishing Solutions
Cecilia Rushton, Hachette
Paul Theijs, Booksonix
Keith Walters, Bibliographic Data Services
Laura Williams, Penguin Random House

1. Introductions and apologies

JT welcomed the Group to the meeting and the apologies were delivered.

2. Competition Law – Conduct Reminder

The Group was reminded about BIC's Competition Law Policy – for more information regarding this policy, click here: <http://www.bic.org.uk/149/BIC-Competition-Law-Policy/>

3. Review minutes and actions from the last meeting and any matters arising

The minutes from the previous meeting were approved and the actions were discussed as follows:

- Prospective measurers / assessors for the revised PDEA Accreditation Scheme
KL noted that a definition for Market Publication Date needs to be added to Assessors Specification prior to it being disseminated. GB sent the definition to KL (via email) during the meeting.
 - **ACTION:** KL to add the definition for Market Publication Date into the specification, ASAP.
 - **ONGOING ACTION:** KL to circulate the final Assessors Specification document to CoreSource, Vearsa and Firebrand Technologies for their consideration, ASAP.
- Measuring tools for the revised PDEA Accreditation Scheme
 - **ONGOING ACTION:** CH, KW and JT to liaise ASAP regarding the implementation of a measuring tool for BDS and Bowker's respective systems.
 - **ACTION CARRIED OVER:** CH to liaise with Nielsen regarding its ability to measure all descriptions for the purpose of the revised PDEA Accreditation Scheme.
- <RelatedProduct> composite

GW confirmed that this topic will be discussed at the next meeting of the BIC Price & Availability (P&A) Task & Finish Working Group (T&FWG), which will take place after the BIC Industry Requirements for Pricing Workshop on Thursday 19th April 2018.

➤ **ACTION CARRIED OVER:** GW to report back on the BIC P&A T&FWG's ideas regarding how to state more than one relationship in a P&A feed.

- Revised ONIX data element sets – terminology

➤ **ONGOING ACTION:** KL to ensure that a glossary is included in the documentation for the revised PDEA Scheme, outlining which is measured / not measured / conditional, etc.

- ONIX Data Element Sets: Audience

GB confirmed that guidance on the use of content warnings / which audience type codes content warnings are required for has now been included in the ONIX Code List documents.

- PDEA Assessors' Specification

KL and CS confirmed that their various actions relating to the PDEA Assessors Specification were carried out following the previous meeting of this Group.

4. Final sign off on the revised ONIX data element sets

GB reported that he and CS have carried out a comparison of the ONIX Data Element Sets for the current and revised PDEA Schemes to ensure that items have not been forgotten / all deprecated elements have been addressed. The following elements were discussed in detail. All amendments, unless otherwise stated, were made to the document by GB during the meeting:

- Cover

GB noted that, on the revised PDEA Scheme, a cover should be disseminated 4-weeks prior to publication date for both the Bronze and Silver awards, whilst an 8-week timeframe is in place for Gold. PM commented that it may be difficult for the PDEA Assessors to measure against two differing timeframes for the purpose of this scheme. KL noted that for all awards it is necessary for organisations to date stamp the cover / provide the date on which the cover was updated. LK noted that the current PDEA Scheme's timeline (i.e. providing a cover 16-weeks prior to the publication date) gave organisations leverage when speaking with their colleagues / business partners. CH noted that, above all else, placeholders / dummy images should be discouraged. GB noted that guidance regarding the provisional nature of images can be added to the Sets.

❖ **DECISION:** The Group agreed that the timeline should be amended to 16-weeks prior to publication date for all awards on the revised PDEA Scheme.

- Pricing

GW and PM questioned why the revised PDEA Scheme singles out Ireland's prices in particular. GB noted that, as well as the PDEA Scheme being a UK scheme, publishers and Nielsen Book treat UK and Ireland as one and the same. He suggested that Ireland is more relevant to this Scheme than other EU countries / regions as a result.

❖ **DECISION:** The Group agreed that Irish prices should be recommended on the revised Scheme.

- Product Properties
 - ❖ **DECISION:** The Group agreed that the <MapScale> composite should be recommended (conditionally) for cartographic products on all awards for the revised PDEA Scheme.
 - Language
 - ❖ **DECISION:** The <Language> composite must be supplied to indicate the language of a text (even when it is written in English) for both the Silver and Gold awards.
 - Subject

GB noted that the <SubjectSchemeVersion> could become mandatory for all PDEA awards when *Thema* usage comes mandatory, i.e. 6 months after the launch of the Scheme.

 - ❖ **DECISION:** In the meantime the Group agreed that the <SubjectSchemeVersion> composite should be required for both the Silver and Gold awards on the revised PDEA Scheme.
 - Free of charge products
 - ❖ **DECISION:** The Group agreed that, for Open Access products, an OA Statement should be used to indicate that the product is open access; this practice is recommended for both Silver and Gold awards on the revised PDEA Scheme.
 - Biographical Note
 - ❖ **DECISION:** Use of the <BiographicalNote> composite for each names contributor should be recommended for both the Silver and Gold awards on the revised PDEA Scheme.
 - No Edition
 - ❖ **DECISION:** Organisations must provide the <NoEdition/> composite when there is no relevant edition number or type information; this requirement should be recommended for the revised PDEA Silver award and mandatory for the Gold award.
 - Thema
 - ❖ **DECISION:** *Thema* should be mandatory, from the onset of the revised PDEA Scheme, for the Gold award.
- **ACTION:** GB to send the final version of the ONIX Data Element Sets to KL and AMB for circulation.
Post-Meeting Update: The final document was circulated to the Group on Monday 19th March 2018.

5. Agreeing the 'go live' date for the revised PDEA Scheme and what should be communicated at London Book Fair 2018 (LBF18)

It was noted that the launch date for the revised PDEA Scheme is dependent on its Assessors and how quickly they can develop their systems in line with the revised ONIX Data Element Sets for measuring purposes. CH suggested that Nielsen may be able to provide an approximate timeline for completion of the necessary developments. GW commented that, especially if a timeline is not provided, the volume of work may be daunting to both existing and prospective applicant organisations. LK suggested however that it may be useful to organisations to gain insight into what's coming.

KL suggested that BIC will send a dedicated email campaign regarding the revised PDEA Scheme, and include information about it in BIC's monthly *What's Happening?* newsletter, in due course. CH suggested that there may be a limited number of ONIX Data Elements which Nielsen cannot develop its system to accommodate, or at least straight away. The Group agreed that receiving a timeline from the Assessors is essential in order to make an informed decision. GB suggested that any items that cannot be mandatory, because Assessors cannot measure them, should become recommended on the revised PDEA Scheme in the interim.

- **ACTION:** CH, JT and KW to report back on the approximate timeline for the development of their respective organisations' reporting systems by Monday 30th April 2018.

It was noted that the Assessors Specification for the revised PDEA Scheme has been signed off.

- **ACTION:** KL to add the definition provided by EDItEUR, relating to ONIX Best Practice Guidelines, to the Assessors Specification ASAP.

6. Group to reach agreement on whether or not spot check should be performed against the quality of specific metadata elements

KL noted that a list of elements which are eligible for spot checking will need to be compiled in due course, should the Group agree that spot checks should be carried out as part of the revised PDEA Scheme. CH suggested that it would also be beneficial to produce a set of guidelines for applicant organisations. GB noted that validations can be developed using EDItEUR's strict / advanced ONIX XSD tool for the purpose of the PDEA Scheme. He noted however that the strict XSD cannot validate the **content** of textual fields so spot checking would also be required in order to address data quality.

It was agreed that this Group should specify the elements which could have a negative effect on applicant organisation's figures. The Group agreed that while misuse of the Subtitle field will not affect an organisation's statistics, it should affect their overall accreditation. PM proposed that that the persistent misuse of ONIX Data Elements should also be penalised, i.e. an organisation would be given an initial warning about their misuse of a field and if they do not address the matter, they will then be penalised. GB noted however that the solution must not be arbitrary. CH suggested that a Sub-Group could address spot checking going forwards.

- ❖ **DECISION:** The Group agreed that spot checking as part of the revised PDA Scheme is necessary and will encourage organisations to address any bad practices they may currently be carrying out. In particular the misuse of the Subtitle field should be deplored.
- **ACTION:** AMB to add "Discussion regarding the ONIX strict XSD 1.1 validation tool and a demo (provided by EDItEUR)" to the agenda for the next meeting of this Group.
- **ACTION:** ALL to put forward suggestions for the development of the strict XSD / validations which would be useful for the revised PDEA Scheme to GB, CS, KL and AMB, ASAP.

7. Agreeing and producing guidance for applicant organisations on the continued use of deprecated ONIX Data Elements

GB noted that information regarding the continued use of deprecated elements is referenced at the top of the ONIX Data Element Sets document. He suggested that EDItEUR's strict XSD tool will facilitate

organisations in identifying deprecated codes that are in use (however the XSD is only available for use by ONIX 3.0 users) and that only organisation which continue to solely use deprecated fields should be penalised at this time, i.e. if an organisation supplies both a deprecated code and a non-deprecated equivalent code, this is acceptable practice. GB noted that this information is inherent in the ONIX Data Element Sets document and does not need to be discussed again for this reason.

➤ **ACTION:** AMB to remove this item from the agenda for the next meeting of this Group.

8. Review deliverable from the Project Brief

KL noted that logos / certificates for the revised PDEA Scheme will need to be produced in due course.

❖ **DECISION:** The Group agreed that a logo and certificate for PDEA Assessors should be produced in future (although it is not a high priority at this time) alongside the documentation of criteria for becoming a PDEA Assessor.

➤ **ACTION:** AMB to produce logos / certificates for the revised PDEA Scheme's applicant organisations before the next meeting of this Group.

GB suggested that it may be possible to share the revised PDEA Accreditation Scheme with other regions in future. KL noted that the BIC Operational Board would need to discuss this possibility. The Group suggested that they would be happy for the Scheme to be shared.

KL noted that a pilot for the revised PDEA Scheme will be carried out by this Group shortly; application forms will therefore need to be revised once more according to the ONIX Data Elements Sets and re-application forms (for those wishing to retain their awards) will need to be produced.

9. A.O.B.

AM noted that Content Warnings are only applicable to Audience Type 01 (i.e. adult fiction titles). GB suggested that a note to this effect could be added into the ONIX Data Element Sets for clarity and that the strict XSD tool could be developed to facilitate in the identification of its inappropriate use.

➤ **ACTION:** GB add a note of clarification regarding Audience Type 01 into the ONIX Data Element Sets document, ASAP.

➤ **ACTION:** GB to look into developing a validation tool for Audience Type 01 (i.e. content warnings are only appropriate for adult titles) and report back at the next meeting.

10. Date of the next meeting

Wednesday 13th June 2018.