BIC PRODUCT DATA EXCELLENCE AWARD (PDEA) ACCREDITATION SCHEME REVIEW TASK &
FINISH WORKING GROUP – Minutes
Bowker Offices, 5th Floor, 3 Dorset Rise, London, EC4Y 8EN
Tuesday 24th February 2015, 2pm

Present
Katy Gibson, BIC
Clive Herbert, Nielsen
Karina Luke, BIC
Peter Mathews, Cambridge University Press
Laura Payne, Penguin Random House
Jack Tipping, Bowker
Gabrielle Wallington, Waterstones
Alfred Willman, Random House Group

Apologies
Alaina-Marie Bassett, BIC
Judith Bennett, Oxford University Press
Thomas Herbert, Palgrave Macmillan
Keith Walters, Bibliographic Data Services Ltd.

1. Introductions and apologies
KL welcomed the Group to the meeting and delivered the apologies.

2. Update on progress on first actions, with reference to Project Brief
KL confirmed that Jack Tipping of Bowker would be taking on the role of Project Leader and Peter Mathews would be his Deputy.
With reference to actions in the last minutes, KL distributed to the Group a draft copy of the survey that KL and JT had compiled.
ACTION: JT to forward the draft copy of the survey to The Publisher’s Association for further feedback.

- Other Involvement in the Group
KL informed the Group that in contacting other data aggregators, there is further interest in the scheme from other organisations, including Ingram Content; Ruth Jones is the contact here.
LP noted that she had not yet had any success in contacting Kobo over their involvement in endorsing the Group’s work.
ACTION: KL to speak to Kobo over their possible involvement in this Group’s work using her contact.

- Project Plan
KL and JT noted that they were currently working on a project plan for the Group’s work, looking at working within a two year timeframe.
The Accreditation Scheme

In reference to the previous action for TH, to look at how to get endorsements from retailers, and other users, to encourage organisations to apply for Accreditation, the Group agreed that it would be necessary to re-action this further along the lifecycle of the Group’s project. However, LP noted that it would be valuable to gauge feedback prior to the production of any final drafts of the Accreditation Scheme criteria to establish any irrelevant fields. PM noted the importance of targeting specific retailers, who are not BIC members to encourage the uptake of the Scheme. AW noted it was important to establish and promote Accreditation as a valuable tool for organisations to measure their internal standards, and that there must be a focus on marketing exactly what organisations will achieve by partaking in the scheme.

Why use the scheme?

The Group discussed that a vital part of the attraction of the Scheme is to improve the condition of the metadata surrounding a product and, consequently, its discoverability. This in turn should improve sales and therefore such an impact is a critical selling point for organisations to seek Accreditation. KL emphasised that the Scheme is a supportive structure to help organisations deliver their metadata efficiently; it must therefore be highly visible and comprehensible. LP noted that this can be achieved by providing explanations and definitions for each field to justify its inclusion in the Scheme.

The Group discussed that retailers and data aggregators would be interested in their own category of the Scheme. This suggestion is included in the Project Briefing document. PM suggested that by involving all threads of the supply chain there will be a strong case as to why organisations should be accredited and see Accreditation as a positive asset. The Group agreed that it needs to work with and refine existing practices, not create guidelines that provide an idealistic version; the criteria must be realistic. KL noted that part of this must be to incorporate timings as to how quickly metadata is processed. All agreed that whatever happens, there must be effective methods of measuring the scheme to provide it with credibility. AW also noted that it was crucial that data suppliers would not be forced to change their systems as a result of the Accreditation Scheme; they would be accredited in terms of the quality of the data output but exactly how this is executed is at the discretion of the individual organisation. Furthermore the publisher should not be penalised for any non-compliant data that its distributor may output. GW commented, that it is the publisher-distributor agreement that must ensure accurate, timely data is sent out. Thus the publisher may take responsibility for the data from the distributor within this agreement. The Group agreed here that a greater degree of responsibility does appear to lie with the publisher.

AW and GW noted that the Price & Availability Codes would need revisiting in terms of setting best practice guidelines and making recommendations; the ONIX update would also be relevant here. However, P&A codes are complex and ONIX can only interpret these to an extent. AW noted that it is thus the aim of this Group to align these two data feeds that organisations are using in practice.

ACTION: Further to the previous minutes, KL to discuss with Neil Wilson at the British Library their involvement with metadata, including how they measure metadata and under what circumstances the British Library creates its own metadata.
3. Work of other Groups

It was also noted that this Group’s work overlaps in certain areas with that of the Acquisitions and Divestments Task & Finish Working Group, specifically concerning the transfer of metadata during the “Grace Period” when ISBNs are acquired/divested. It was also noted that currently the Price & Availability Task & Finish Working Group is focusing on the TRADACOM code list 54. It was noted, however, that the work of this group is to focus on the metadata output prior to publication but that it was worth also considering guidelines surrounding data outputs during transactions.

3. A.O.B.

- Questionnaire

KL asked the Group whether they thought a one-size-fits-all questionnaire (as the survey stands currently) would be useful or whether separate questionnaires for publishers, distributors and suppliers was more appropriate. The Group agreed that separate surveys may be more suitable as otherwise the questionnaire may be too complex and participation figures may be low as a result. The Group asked who exactly this would be e-mailed to and KL replied that this would go to all on BIC’s mailing lists, not just BIC members, as organisations do not have to be a BIC Member to be accredited by the Scheme. AW suggested that a smaller list of questions may be preferable with very few requiring extra detail, for example “who is responsible in your organisation for metadata?” and asking what participants know of the Scheme already, if anything at all. The Group suggested that a mixture of “tickbox” yes or no questions and those requiring further detail were required but that the survey should be kept as short and as user-friendly as possible to guarantee high numbers of participants. Perhaps even with a sliding scale of 0-5 with questions such as “how are of metadata is your organisation?” (although there is a lack of clarity in using such scales). Specifically, the Group noted that asking whether the organisation is accredited already should be a question early in the survey.

KL noted that the brief introduction to the survey must also make the participants aware of the benefits of replying and being involved in delivering feedback about the Scheme. The Group agreed there were several points here; raising awareness of metadata internally, alerting relevant parties to potential problems and engaging organisations in a discussion about such problems and how best practice guidelines could help to solve these problems which will form the basis of the Accreditation Scheme. KL noted that the focus of this should be highlighting the impact of high standards of metadata on sales. The Group agreed that this aspect was critical to highlighting the value of the Scheme. PM commented that the Group must gauge expectations of communications of product metadata and provide guidance of what exactly the improved Scheme will accommodate.

The Group agreed that any questions on “custom packs” were, at least at this stage, too specific for such a questionnaire. Further to this the Group noted that questions were needed on the size of organisation including their turnover or number of employees or even the number of titles in their ownership. However, there may be low response rates if the Group’s survey probes too far into internal figures.
The Group agreed that gathering statistics on how improved metadata can increase sales and the consequent impact this had on authors was important but the most recent investigation here was a White Paper published in 2012. The Group agreed that at least in the first communication with participants it was important to keep it brief. KL suggested that further fields with contact details to facilitate sending out another, more detailed survey to respondents of the first could prove valuable here. CH suggested the use of maximum 5-6 questions in the first instance only. PM suggested that key questions should be asking publishers, distributors and retailers exactly what they think the others should be accredited for, i.e. asking publishers what exactly they think retailers should be measured for to lead to Accreditation and vice versa.

**ACTION:** KL/JT to draft four separate questionnaires for distributors, publishers, retailers and data aggregators and then circulate to Group for feedback. Feedback must be sent to JT/KL prior to next meeting.

**ACTION:** ALL to continue considering what elements are critical to be included in the scheme, digital and physical.

- **Should more tiers of digital accreditation be included in the new PDEA scheme?**

The Group discussed whether another layer of Accreditation is required to add to BIC Basic, BIC Excellence, BIC Excellence Plus and the “Digital Tick”. GW noted that clear checklists should be produced, with timeframes, for each layer. The Group agreed that explanation is required to clarify why, if an organisation has achieved a BIC Basic accreditation, should it strive to be accredited at a higher tier.

The Group discussed whether the digital tick accreditation should still be considered as a separate item, or included in and be part of the main scheme. The Group agreed that a digital supply chain accreditation scheme requires high level of detail to address the complex processes and suggested that consequently could be regarded as a separate product type requiring its own stand-alone accreditation scheme. The Group discussed that Print On Demand should also be factored in to the Scheme as well. Therefore as greater importance is placed on different parts of the supply chains for digital and physical, for the purposes of clarity and practicality, it may be worth looking at two co-existing schemes. This would be achieved by producing separate relevant checklists for each step in each of the supply chains.

KL noted that organisations not using THEMA or ONIX 3 would not be penalised and that the Schemes should reflect this. However, in order to encourage their use, perhaps a new tier such as a Platinum accreditation level would provide that extra level of accreditation for those deploying both systems effectively. KL suggested including a question on organisations’ use of THEMA and ONIX 3 in the survey discussed above. GW agreed that by including these on the scheme the Group could effectively “future-proof” the scheme so any future updates do not include any radical changes but are simply updates. The Group agreed that any such scheme needs to keep pace with the industry and would therefore need reviewing every two years; it should be made easy to include or exclude certain fields. LP noted that whichever fields were included, explicit reasons should be given as to their inclusion as she noted it was not always clear why an organisation has not achieved a higher level of accreditation. LP noted that the scheme should also acknowledge new practices in the book industry such as self-publishers whose books may be acquired and published within a tight
timeframe. KL suggested including as a question in the survey, what types of products organisations would like to not include in the scheme, for example custom packs or TV and film book tie-ins, to avoid confusion and an unfair skewing of data that may adversely affect the Accreditation of an organisation. Although the Group noted that this could also be achieved by leaving in the products and simply lowering the targets to be reached for each accreditation level. However, after much discussion, the Group felt that this approach could discredit the scheme as already the required percentages to reach Accreditation are generous.

The Group agreed that how exactly characteristics are measured is critical to the success and value of the scheme. The Group agreed that in measuring Product Data it was worth establishing a definitive point at which the data can be measured. The Group discussed whether the record could be measured to the degree it is complete at the point when the book is published and in the public domain. However, the Group agreed that vital accurate data is needed well in advance of this date. Therefore, the original 16 week timeframe deployed in the current scheme may still be relevant; the minimum standard of data should be delivered 16 weeks prior to publication date. The Group agreed that this may be a valuable question to include as to whether this timescale is still applicable in the industry today and whether retailers in particular are buying with this timeframe in mind. GW also noted the difficulties with publishers exploiting the rights of books in their backlists and how the metadata can consequently change; how can this be addressed by the accreditation scheme? Should it be? The Group agreed that it would be difficult to standardise the timings for POD and e-book publication for a separate digital accreditation. LP noted that in doing so explicit description and justification is needed to accompany each field included in the Scheme. LP also suggested that perhaps one method of measuring the scheme would be to determine the average number of ONIX acknowledgement messages released monthly to measure the level of efficient data outputs.

**ACTION:** Following the discussion above, KL/JT to update and amend draft questionnaire including the Group’s suggestions.

**ACTION:** GW to talk to buyers at Waterstones to establish whether 16 week timeframe (between buying the book and its publication date) is still applicable.

**ACTION:** ALL to look at BISG’s Accreditation Scheme (also under review) to determine if there are any international issues to be addressed.

- **Product images**

  The Group discussed the basic most commonly used standard and workflow is what the accreditation scheme must focus on in practical terms, for example, it is not always practical to provide a jacket image prior to official publication but it is currently a requirement of the BIC Basic Accreditation Scheme. Therefore, the Group would have to consider whether this was a necessity for the accreditation scheme.

- **Weights and Dimensions as a mandatory field?**

  The Group agreed that as this related to the dimensions of physical product, or e-books, it could not be a field easily mapped from the existing accreditation scheme to a digital scheme and arguably shouldn’t be mapped at all since ebooks have no physical dimensions, other than file size. This is
perhaps another reason why it may be preferable to have separate digital and physical product data accreditation schemes.

4. **Date of next meeting**
   The next meeting will be on Tuesday 17th May 2015.
   AW noted that it was worth alerting organisations at the London Book Fair that the BIC Accreditation Scheme was under review and KL agreed and noted that BIC’s LBF session was being held on 16th April.
   **ACTION:** KG to send out DoodlePoll to arrange next meeting.