



BIC Task & Finish Working Group
Project Briefing Document
Product Data Excellence Award Scheme Review

BIC Project Brief

The Purpose of the BIC Project Brief

The BIC Project Brief is required to enable necessary projects, or pieces of work to progress from being a good BIC Committee idea to a formal request for work that is submitted to the appropriate Task and Finish Group. The BIC Project Brief must be agreed upon and signed off initially by all members of the BIC Committee and then then the dedicated Task & Finish working Group once established.

This document will eventually be expanded into a Project Initiation Document (PID), (to be created by the Task & Finish Group) which will contain the detailed project plan.

The BIC Project Brief should generally be short and provide an overview of the proposed project or piece of work.

The finalised, signed off document will be made visible to all BIC members, who will be free to provide comment or feedback on the intended project or work.

Document Status: DRAFT

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Reporting Line(s)

BIC Metadata Sub-Committee

BIC Product Data Excellence Award Judging Panel

Signed off by:

BIC Metadata sub-Committee

BIC Product Data Excellence Award Judging Panel

Document History

Version	Summary of Changes	Document Status	Date published
0.1	Initial draft	draft	27 th June 2014
0.2	With feedback/comments from committees incorporated	draft	15 th Sep2014
1.0	Minor amendments.	Final version	26 th Sep 2014

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1. PURPOSE

The purpose of the work is to review the current Product Data Excellence Award scheme in its entirety to ensure it reflects and recognizes the work practices of the book industry today. Any areas identified as requiring change will be agreed by the Working Group and the current scheme will be adapted as necessary. By revising and updating the scheme it is intended to re-launch the scheme and attract wider awareness and participation.

The current scheme applies only to book publishers and only measures publishers that deliver data to Nielsen. Nielsen are currently the only organisation made known to BIC that is able to reliably and consistently measure at the level of detail required for the accreditation scheme.

The Working Group is charged with expanding the new scheme to include other industry sectors such as: retailers (both bricks and mortar and on-line), distributors, sales agents, etc and to open up the scheme to include suitable measures/statistics from other data aggregators/service providers in addition to Nielsen. In opening the scheme up in this way it is hoped greater awareness and participation might be achieved.

The review must take into account new developments and standards such as ONIX3 and Thema.

2. BACKGROUND

This piece of work is needed in order to ensure BIC's Product Data Excellence Award (PDEA) scheme remains relevant in today's book industry and to maintain and increase industry engagement. The scheme was last reviewed in 2010.

BIC is currently reviewing all 3 of its accreditation schemes, of which the PDEA is one. The other two being: e4Libraries Accreditation, and the Supply Chain Accreditation schemes.

3. PROJECT DEFINITION

3.1. PROJECT OBJECTIVES

Objectives of the project are:

- 1) Review the existing scheme and deliver a Product Data Excellence Award scheme, that measures, acknowledges and rewards the use of new key industry standards (eg Thema and ONIX 3) and fully integrates ebook metadata data as part of the regular data supply chain. Rules, criteria, application process and documentation must be made as easy as possible to follow/understand for all organisations involved.
- 2) The revised scheme should also make possible the accreditation of other data supply chain participants eg retailers, distributors and so on.
- 3) The assessment of applicants' data by other data service providers/aggregators in addition to Nielsen is a requirement of this project. It is important that other data service providers give regular, reliable input into this scheme.

The working group will need to determine how 2) and 3) might best work and which organisations in the Metadata Supply Chain should be targeted first. The working group will also need to determine how BIC might best approve data service providers/aggregators mentioned in 3). This may involve an application form, testing their methods, validating their outputs etc

4) The final objective is to widely promote and encourage the new and expanded scheme to the BIC community and beyond. This will be aided by a clear list of benefits. The Working Group will need to consider what additions to the Accreditation Panel and also the Metadata Committee might need to be made in light of the changes to the scheme.

Other deliverables from the Working Group will be:

i) Monthly progress reports to the Metadata Sub-Committee and BIC's Executive Director using the BIC Progress report template.

ii) Revised accreditation logos/certificates if required

ii) Logo and certificate to indicate a data service provider/aggregator is BIC approved.

iii) New Terms of reference for Accreditation Panel

iv) A launch plan and timeline for the new scheme.

v) New accreditation scheme test plan – to be carried out prior to launch.

3.2. PROJECT SCOPE

The scope of this project is to review and enhance the current accreditation scheme for book publishers with a remit to expand or modify it so that it is extended to include other industry players: retailers, distributors and so on.

Library and library supply organisations are excluded as they fall under a different accreditation scheme.

Standards definitely falling within scope are Thema, ONIX2.1 and ONIX3. Other standards may be of interest – this to be determined by the Working Group.

Products falling within scope are all products identified by an ISBN.

Major dependencies for the project are:

- 1) The time and commitment of the volunteers making up the working group.
- 2) Industry approval and buy in
- 3) Metadata Committee approval
- 4) Working Group members will need a good understanding and appreciation of ONIX3 and how it is different to ONIX2.1 in order to determine if any new data fields need to be added to the accreditation criteria.

3.3. CONSTRAINTS

The primary constraints will be

- i) the time and resource of the Working Group members.
- ii) BIC Budget.

3.4. INTERFACES

It would be prudent to review BISG's Data Accreditation scheme to achieve some commonality where/if possible.

The BIC Metadata sub-Committee is the committee ultimately responsible for this project work and the Working Group.

There should be interfaces between this Working Group and the Physical and Digital Supply Chain Committees as they will have an interest in the development of the scheme.

Third party data service providers/aggregators who may wish to be considered for approval/certification as a BIC Accreditor.

Nielsen

BIC members: specifically to include publishers, retailers, distributors, wholesalers.

Industry Press – should be alerted to what we are doing, and when we intend to launch.

4. OUTLINE BUSINESS/INDUSTRY CASE

If BIC's Product Data Excellence Accreditation Scheme does not remain current, or have relevance and clear benefits for the book industry, then the risk is that the industry will disengage and standards of metadata supply will fall. This in turn may lead ultimately to a decline of discoverability and in turn sales, in the book industry. Extending the scheme to include other industry organisations such as retailers, distributors and so forth brings a greater degree of relevance and benefit to a much deeper reach of the metadata supply chain, which can only be of benefit to everyone in the book industry.

5. QUALITY EXPECTATIONS

With the sunset date of ONIX2.1 fast approaching (31st December 2014) time is a key factor for this project. It may be desirable to consider a temporary ONIX3 "tick" while the rest of the work in this project is being carried out. This is for the Working Group to decide. Similarly, Thema is gaining traction globally and the same considerations should be given to this. It is important with an industry recognized accreditation scheme that upon launch everything is in place, clearly stated, easy to understand and achievable. In this regard then, it is more important that time is taken to ensure accuracy and robustness of the overall new scheme than to rush it through. It is expected that a rigorous testing plan would be put in place, prior to launch, to ensure the new scheme is 100% fit for purpose.

6. ACCEPTANCE CRITERIA

The scheme must address and encourage adoption of ONIX3 and Thema

The scheme must incorporate and measure data for printed, electronic and print-on-demand books i.e. for all products identified by an ISBN.

The scheme must be tested end-to-end prior to launch i.e

- 1) data received from publisher
- 2) data received from retailer
- 3) data received from distributor etc
- 4) performance of Data Aggregators against agreed Accreditation Criteria.

In addition, all deliverables described in 3.1 of this document must be achieved and approved by the Metadata Committee before the project will be signed off as completed.

7. RISKS

The risk of doing nothing is that the BIC Product Data Excellence Accreditation scheme becomes out of date and irrelevant to the industry, which in terms of monitoring, promoting and improving data supply across the industry is not a desirable outcome.

8. OUTLINE PROJECT PLAN

The Working Group will deliver the final Project Plan – this will be one of their first tasks. Given the amount of work involved, it is anticipated that completion will be in approximately 12 months' time from the date of the first Working Group Meeting.

Other initial key dates are as follows:

Activity	Deadline
Project Brief distributed to current PDEA Judging Panel for comment	1 st July 2014
Project Brief distributed to Metadata Committee for comment	29 th July 2014
Any/all changes incorporated into final draft and submitted to Metadata committee and current PDEA Judging panel	15 ^h September
Final Project Brief signed off by Metadata Committee and current PDEA Judging panel	22 nd September
Call for volunteers to sit on Working Group	29 th September 2014 – 13 th October 2014
First Working Group meeting	Before end November 2014
Detailed project plan drawn up by Working Group	Before end-December 2014

9. BUDGET/COSTS

Cost of meeting room bookings

Cost to redesign logos, certificate etc and introduce new ones

Consultancy costs (should the need arise, which it is currently anticipated won't). Consultants are not be engaged in this project without prior consent of BIC's Executive Director.

Possible advertising costs with industry press.

10. AUTHORITY RESPONSIBLE

Executive Director of BIC.

11. PROPOSED TASK & FINISH WORKING GROUP LEADER/PROJECT MANAGER

Nominations will be called for ahead of the Working Group's first meeting.

12. REPORTING

It is expected that there will be monthly progress reports from Project Leader using the BIC Project Update form provided.

This should include (but may not be limited to) information on the following:

- i) Costs to date v budget
- ii) Projected costs v budget

- iii) Progress of deliverables against agreed timeline
- iv) Engagement of Working Group

END