

"All our wisdom is stored in the trees"¹

using a tree to model metadata mission and vision

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ABSTRACT

How well are the mission and vision of your metadata team articulated? Is there a clear strategy in place to achieve that vision? Are there clearly defined goals to support it? Do wider colleagues understand what happens in the metadata team, and the centrality of metadata to the institution?

A team purpose tree can help to visualise the role of a metadata team as a central component in supporting discovery, which enables teaching, learning and research in the wider context of a library and its parent institution. Mapping the library and institutional strategy to a mission and vision for the metadata team brings clarity and focus to the value of day-to-day work. It also demonstrates how metadata contributes to strategic priorities, a particularly important skill when communicating with senior managers and decision makers.

KEYWORDS metadata strategy; metadata advocacy; metadata leadership

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The Metadata team purpose tree is a model that has been in use at LSE since 2018. The concept was first encountered as a diagram designed to support thinking about employee engagement, in the context of an LSE Leadership programme. (Credit for the original idea goes to Tim Fuller ([Fuller, no date](#)) of the Reality Business and is used with permission).

I adapted this to a more visual framework and we used it in response to structural changes that were having an impact on our team. Specialist colleagues, such as those in the Metadata team, had ceased to be part of day-to-day customer facing activities, and were entirely focused on office-based metadata work. Conversations suggested that this shift made it harder to maintain a clear sense of the centrality of the team's work to the wider institutional mission. This carried a risk of reduced engagement and, potentially, lower job satisfaction. In response the model helped to demonstrate the importance and purpose of our work in the context of the Library as a whole and the wider institution.

¹ [Kalwar, no date](#)

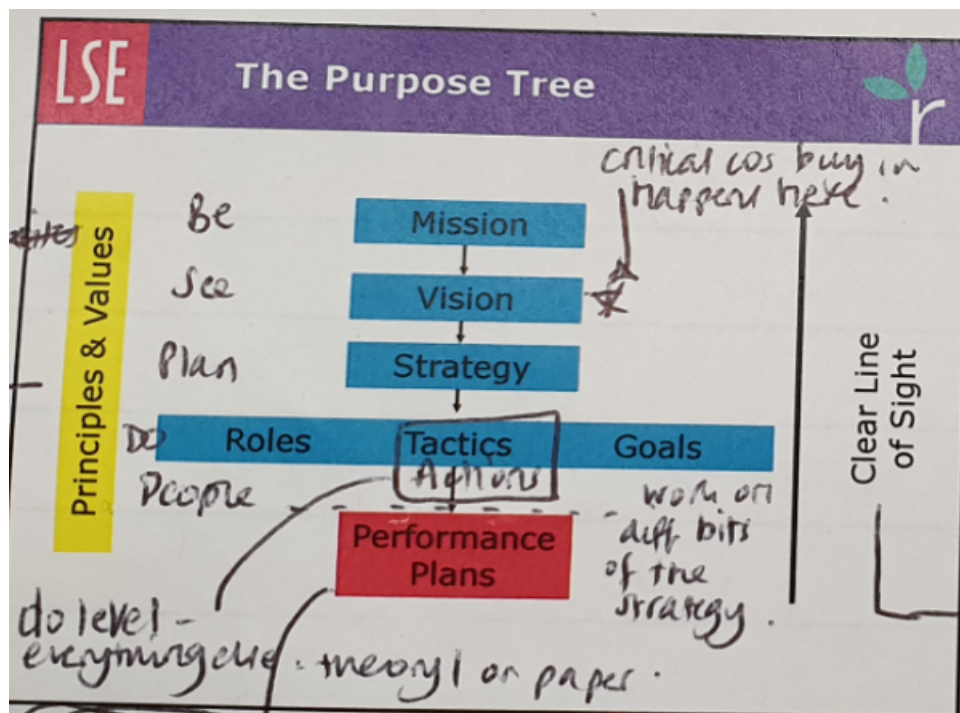


Figure 1: Original purpose tree. © Tim Fuller, The Reality Business

Over time we have discovered that in addition to supporting the team with a greater understanding of their shared purpose, the clarity on shared goals and objectives has also had wider value in supporting:

- confidence in contributing to the strategic direction of the university,
- increased ability, across the team, to advocate for metadata and its central role in institutional priorities,
- a more accessible route for wider Library colleagues to gain a better understanding of the Metadata team and its value proposition,
- increased visibility of the team and its transferrable skills, leading to more collaborative opportunities and an extended portfolio of work,
- development of a wider remit and skillset which helps with future proofing as technology, services and institutional needs evolve, and
- making the case for staffing and tying funding requests into the strategic direction of the university.

The purpose tree also aligns with John Stepper's "working out loud" model ([Stepper, no date](#)), an approach I was keen to foster in the team. The details and information we include in our purpose tree help us to have transparency within the team, and to be purposeful about eliminating the invisibility that can all too easily occur when individuals within the team are involved in different areas or projects. It supports attitudes of openness, visibility and connection as key values across different strands of work and helps to build an environment for shared problem solving and emerging thinking. At LSE I created our purpose tree and then shared it with the team, but in hindsight it would have been more beneficial if we had developed it together as a

team. This would have collated richer and broader input, as well as encouraging greater ownership within the team.

Karen Smith Yoshimura has observed,

"An indispensable skill in these times is the ability to explain in a concise, compelling, and relatable way to administrators and other decision makers why resources should be allocated to creating and maintaining structured metadata. The audience for these appeals frequently will not have a background or past work experience in this type of work. Many professionals in need of ideas for making arguments for metadata as a strategic priority could benefit from exchanging ideas and techniques for effective advocacy." ([Smith Yoshimura, 2017](#))

Reflecting on this, and on the increasing importance of metadata advocacy, it seemed appropriate not only to share the purpose tree model with the wider metadata community via the MDG conference, but to facilitate an interactive session whereby participants could discuss together in small groups how to articulate the mission, vision and strategy of a metadata team, and then share feedback with all conference participants to foster knowledge exchange of valuable professional expertise.

With a blank purpose tree² in hand our interactive session took participants through some questions to help them consider the following:

Mission – think about why you exist as a team:

- What does your team do? What is your main reason for being a team?
- Why do you do what you do? What is the purpose behind it?
- Who are you doing it for? Who is your audience?
- What is the benefit of what you do?

Based on our experience I recommend making the mission statement organisation-specific, timeless, and around 15–30 words so that it is easily memorable.

Participants were provided with LSE Library's Metadata team mission statement as an example to stimulate discussion if needed.

"Facilitate discovery of LSE Library collections and LSE research for the LSE community and the wider world."

Vision – think about what it looks like if you fulfil your mission:

- What do you want to achieve and see in your team?
- What is it that your everyday work contributes towards the mission?

² A blank purpose tree template is available as an additional resource at <https://journals.cilip.org.uk/catalogue-and-index/article/view/971>

Due to fast paced technology changes, I would recommend thinking in a 1–5 year time frame, depending on what is most applicable in the local context. Like the mission statement ideally the vision will be something that teams can share and communicate clearly.

We summarise the LSE Metadata team vision as:

"Create and manage comprehensive and authoritative metadata which adds value to LSE's outstanding collections, contributes to the global web of data, and facilitates wide use of the collections."

Strategy – think about your plan to achieve the vision:

The strategy begins to get a bit more practical, but is still quite high level and general, rather than focusing on day-to-day tasks. I suggest aiming for 5–6 bullet points, which might cover processes, training, current awareness, collaboration and promotion.

At LSE our plan to make our vision a reality is to:

- "Promote metadata as an institutional asset
- Embed Metadata representation across Library activity
- Encourage team development
- Ensure efficient processes at all stages of the metadata lifecycle
- Maintain current awareness of international metadata trends
- Engage with internal and external colleagues on collaborative opportunities."

Mission, vision and strategy feed into the **goals, actions and roles** section of the purpose tree. This is much more organisation specific, so the MDG interactive session did not break participants into groups for further discussion, but at LSE we use this section to represent:

- library and institutional strategic aims as our goals,
- business as usual and operational library project work as our actions, and
- people working on each area as our roles.

This helps to depict the connection between the work undertaken by the team, and Library and institutional priorities. The purpose tree is updated, on average, 2 or 3 times a year to maintain currency. Specific work tasks or areas identified here feed directly into annual career development reviews and to the objectives contained within those, which are monitored in one-to-one meetings with line managers throughout the year.

The purpose tree has helped embed our work within the wider institutional context and has enabled the team to see how they fit into the bigger picture. It has also been a constructive visual depiction of the unique value the team brings to institutional

strategies and priorities. Its use as an advocacy tool can help colleagues outside the metadata community of practice to understand our roles and our contributions to the wider organisational context. We have found this to be a very valuable model for us as a team, and it is shared in the hope that it may be adaptable to other metadata contexts.

AI statement

I used Microsoft CoPilot to proof-read my final draft of this article, incorporating some of its suggestions to improve clarity.

References

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