Program for Cooperative Cataloging

PCC

BIBCO / CONSER / NACO / SACO

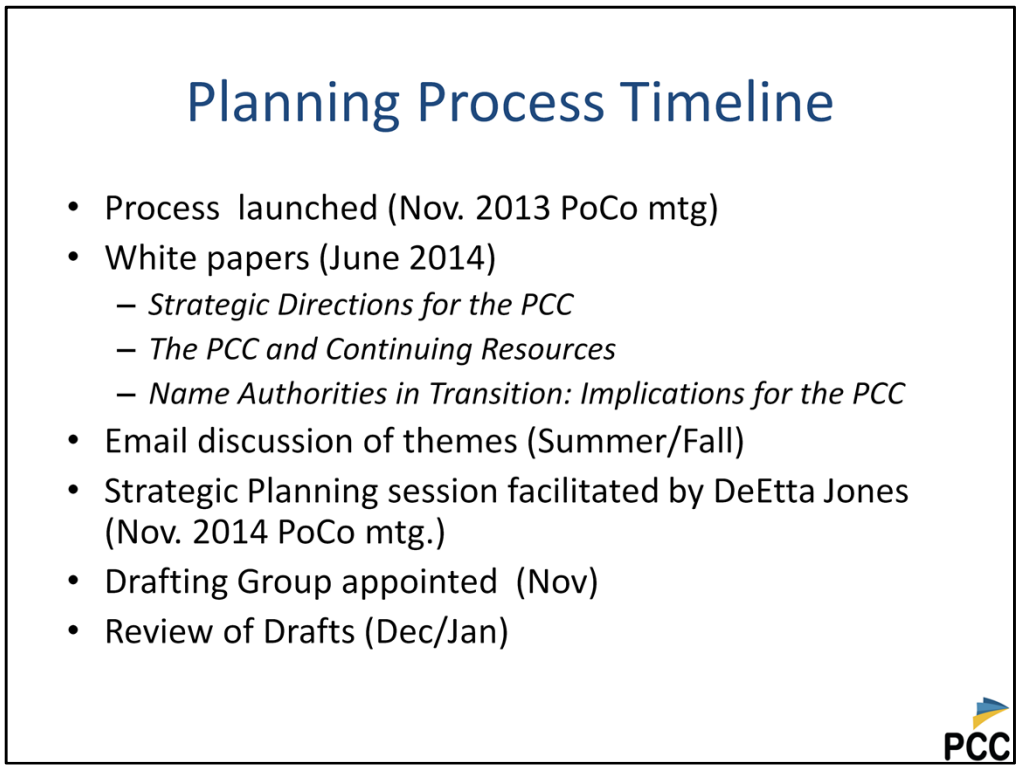
Vision, Mission, and Strategic Directions

January 2015-December 2017

Christopher Cronin & Beth Picknally Camden

PCC Participants Meeting
ALA Midwinter

Chicago, IL
February 01, 2015



PoCo 2013 – launched the strategic process

White papers (commissioned early in 2014; received in June 2014)

Strategic Directions for the Program for Cooperative Cataloging by Philip E. Schreur, Stanford University (and Past-Chair of PCC)

The PCC and Continuing Resources by Regina Romano Reynolds, Library of Congress

Name Authorities in Transition: Implications for the PCC by the PCC Advisory Committee on Initiatives (ACI)

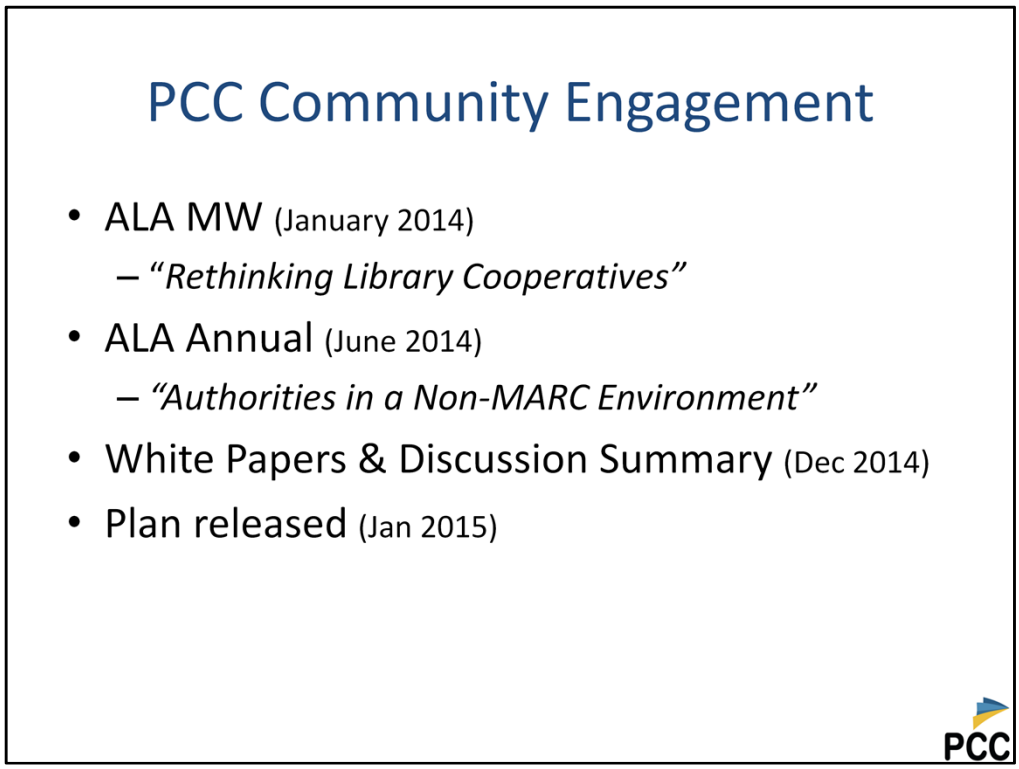
PoCo email discussion of themes from the white papers – summer/fall 2014

-RDA
-BIBFRAME & Linked Data
-Continuing Resources
-Changing Cataloging Culture
-Authorities beyond LCNAF & Broader Participation in Authority Creation

PoCo Novemeber 2014

Strategic Planning session facilitated by DeEtta Jones

Drafting group appointed (Nov): Chris Cronin, Kate Harcourt, Chiat Naun Chew, Lori Robare. Several drafts reviewed by PoCo and PCC Standing Committees (Dec/Jan)



PoCo felt that it was important to engage the PCC community in the process. We selected themes for the Participants meetings which reflected the strategic discussions which were underway.

ALA MW (January 2014)
"*Rethinking Library Cooperatives*"
Karen Calhoun

ALA Annual (June 2014)
"Authorities in a Non-MARC Environment"
Jennifer Liss, Carl Horne, Christine Eslao, Philip Schreur

White Papers & Discussion Summary released (Dec 2014)

Plan released (Jan 2015)

This is a word cloud of the major themes and discussion topics that emerged from the all-day strategic planning session that preceded the drafting of the Strategic Directions and Actions.

Vision

The Program for Cooperative Cataloging (PCC) community is an influential source of metadata expertise, experimentation, and training. The PCC community's data are trusted, integrated, and valued in the global data environment.

Mission

The PCC focuses on efficiently creating and refining metadata that meet user needs for effective resource discovery. The PCC supports and advocates for the library and information communities by:

- developing, adopting, and adapting standards for resource discovery;
- providing continuing education and training for metadata creators;
- enabling the extension, iterative enhancement, reuse, and open exchange of metadata;
- facilitating the automated generation of metadata; …

Mission (cont'd)

- developing tools and templates for metadata creation;
- leveraging emerging technologies, such as linked data;
- encouraging work at the network level;
- registering controlled vocabularies;
- employing technology creatively;
- collaborating with scientific and cultural heritage institutions, publishers, and vendors;
- partnering with professional organizations in areas of mutual interest.

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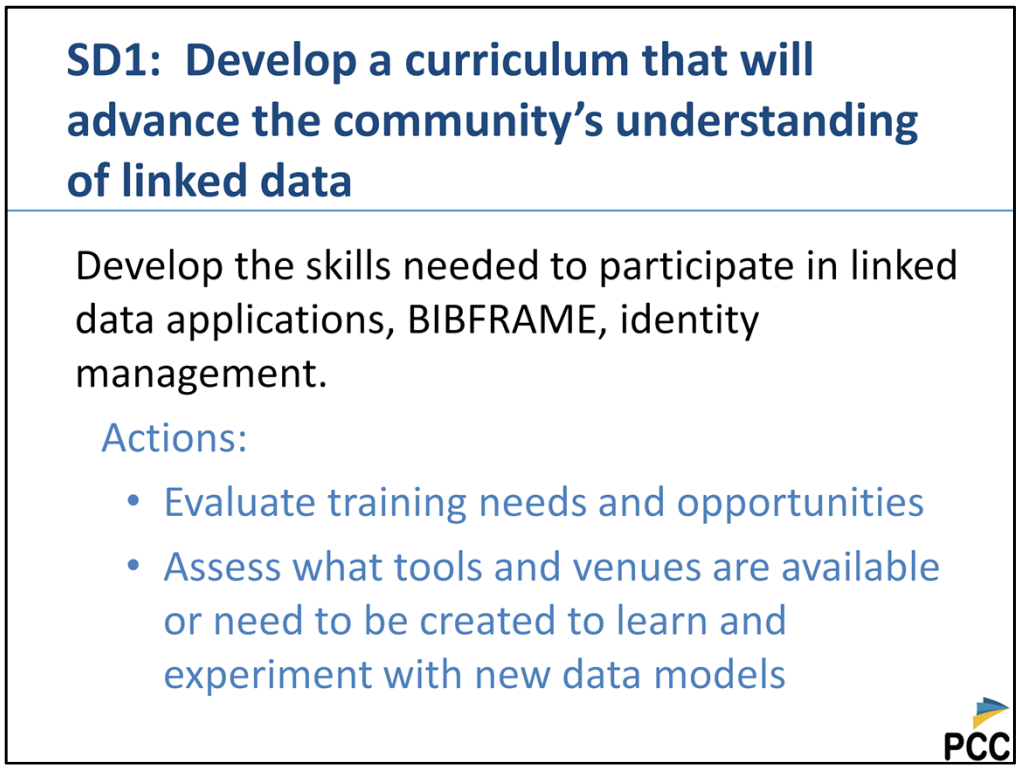
Strategic Directions & Actions

Focus around four main themes:

- Education needs related to linked data
- Determine how to shift out of MARC and into linked data
- Move from authority control to identity management and use of identifiers
- Impact on PCC's brand and need to explore new funding models



The first Strategic Direction is: **"Develop a curriculum that will advance the community's understanding of linked data."**

The PCC has a strong tradition of developing and providing training for metadata creators within the PCC and beyond. To date, the focus has been on library-specific standards and data formats. Moving forward, it will be critical for participating institutions to develop the skills needed to become proficient in applying linked data vocabularies and element sets (e.g., BIBFRAME, RDA Registry), identity management, and other related applications of Semantic Web technology. Engaging in the broader information environment will require new knowledge and skills, an understanding of practices in other metadata communities, and the development of strategies for optimizing library data on the web. To meet these needs, the PCC will identify and incorporate learning resources, experimentation opportunities, and expertise within and beyond those already present in the PCC.

Actions items for this Strategic Direction include:

- Perform environmental scans to evaluate: categories of linked data training that are needed; existing training resources that the PCC can use; training programs that should be commissioned from experts in those domains; training that the PCC will need to develop itself.

- Assess what tools and venues are available to foster the learning of new data models, and consider if any additional tools and venues need to be created. Consider options for building or otherwise providing access to settings like discussion platforms, sandboxes, and testbeds for experimentation with linked data standards and applications (e.g., BIBFRAME profiles and editors; transformation of existing MARC data). Consider potential partners for these efforts.

The second Strategic Direction is: "**Align the PCC's activities and investments with those that will have the highest impact within the global data environment.**"

Our record-based environment will be transitioning to one based on dynamic collections of metadata statements and identity management. The PCC must build infrastructures, services, partnerships, and practices that will continue to provide cost savings through the exchange of library data, while at the same time giving that data the highest value and use within the global data environment.

Action items for this Direction will include:

- Bringing together representatives from the BIBFRAME Early Experimenter and Implementer institutions, as well as other experts, to help the PCC assess tools, services, and infrastructures that may need development for effective metadata creation and management in a post-MARC environment.

- It will also include determining how the PCC will engage with the bibliographic utilities (OCLC and SkyRiver) and the vendor community (ILS vendors, automated authority control vendors, contract cataloging vendors, and publishers) to ensure timely creation and adoption of linked data-enabled products and services.

SD2: Align PCC activities and investments with those that will have the highest impact within the global data environment

Actions (cont'd):

- Identify how PCC could contribute most effectively to metadata provision for digital collections
- Assess the impact of a post-MARC environment on metrics and reporting methods currently employed by PCC

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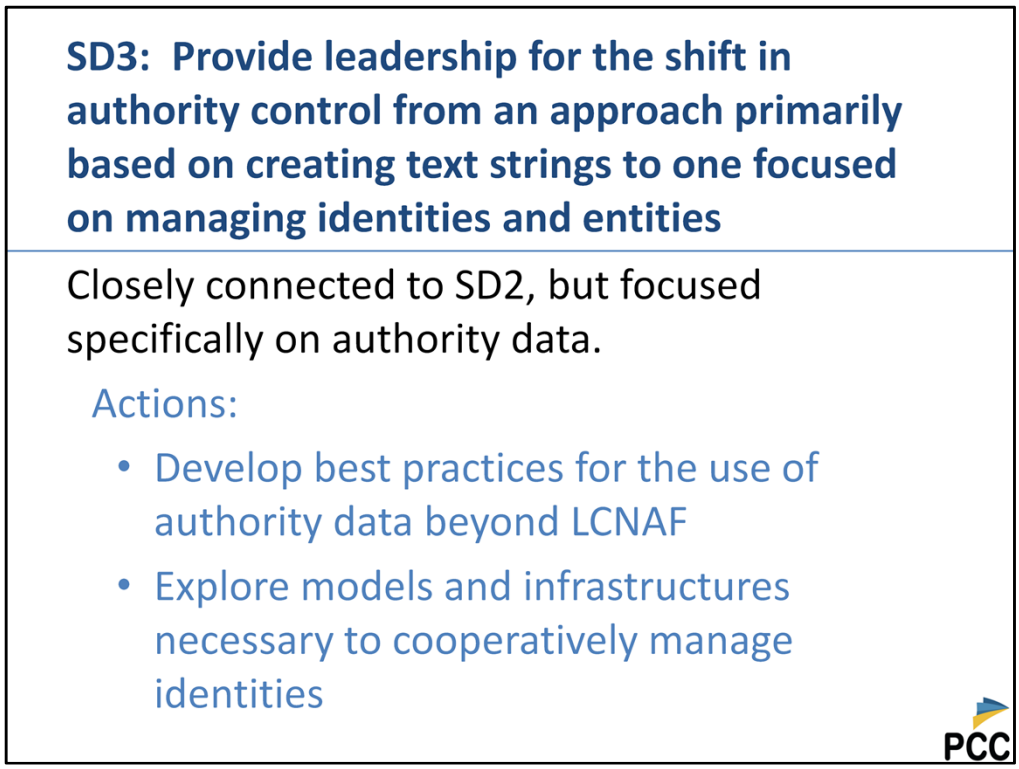
This Strategic Direction will also include:

- Building on recommendations from earlier PCC task group work on how to expand PCC metadata contributions beyond RDA and MARC, we will undertake a current needs assessment to identify how PCC could contribute most effectively and strategically to metadata provision for digital collections.

- And we will assess the impact of the linked data environment on the various metrics and reporting methods that are currently employed by PCC for measuring contributions to the Program. In the absence of metadata "records," we will need to determine what will be of sufficient value for the PCC to count and why.



Strategic Direction 3 is "**Provide leadership for the shift in authority control from an approach primarily based on creating text strings to one focused on managing identities and entities**."

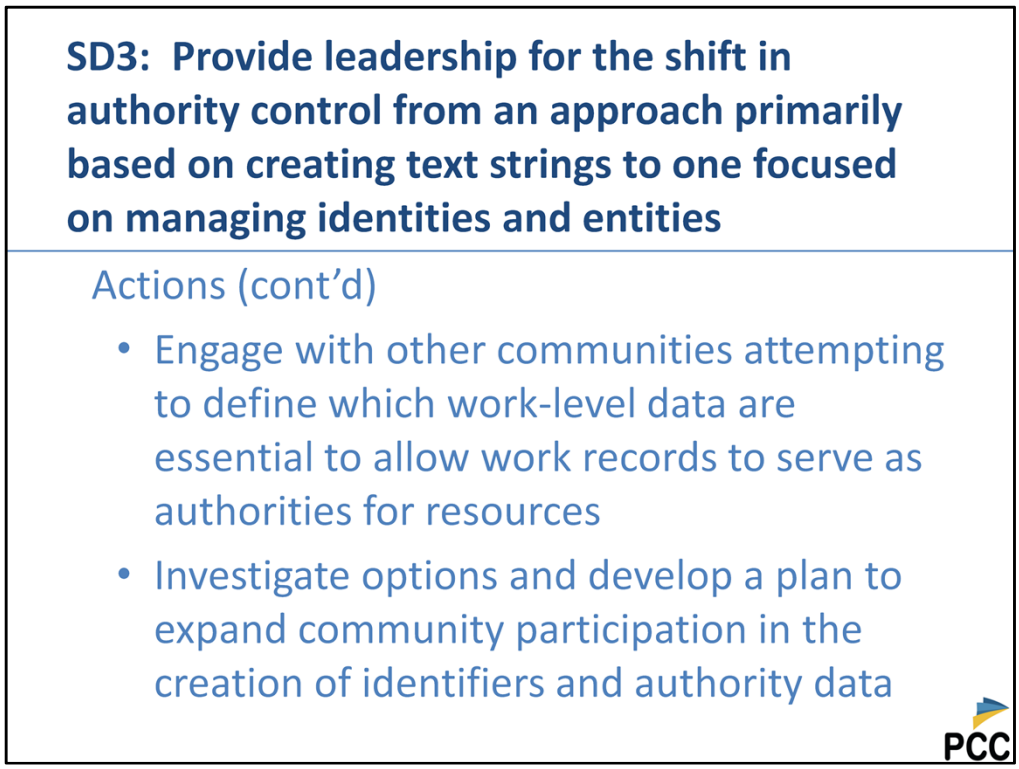
This direction could be seen as a sub-direction of the previous one, but is focusing specifically on our authority data. This is a big one and we felt it warranted its own discrete direction.

Our existing methods of library authority control are based on constructing unique authorized access points as literal display value text strings. This string-based approach has worked reasonably well in the closed environment of a traditional library catalog, but is not suitable in an open environment where data are shared and linked, and so require unique identifiers. By leading the transition to a new set of practices that promote the use of unique identifiers, the PCC will increase both human and machine use of library data, and so, too, its overall value.

Actions items for this Strategic Direction include:

- Establishing a task group to develop best practices for the use of authority data sources beyond the LC Name Authority File.

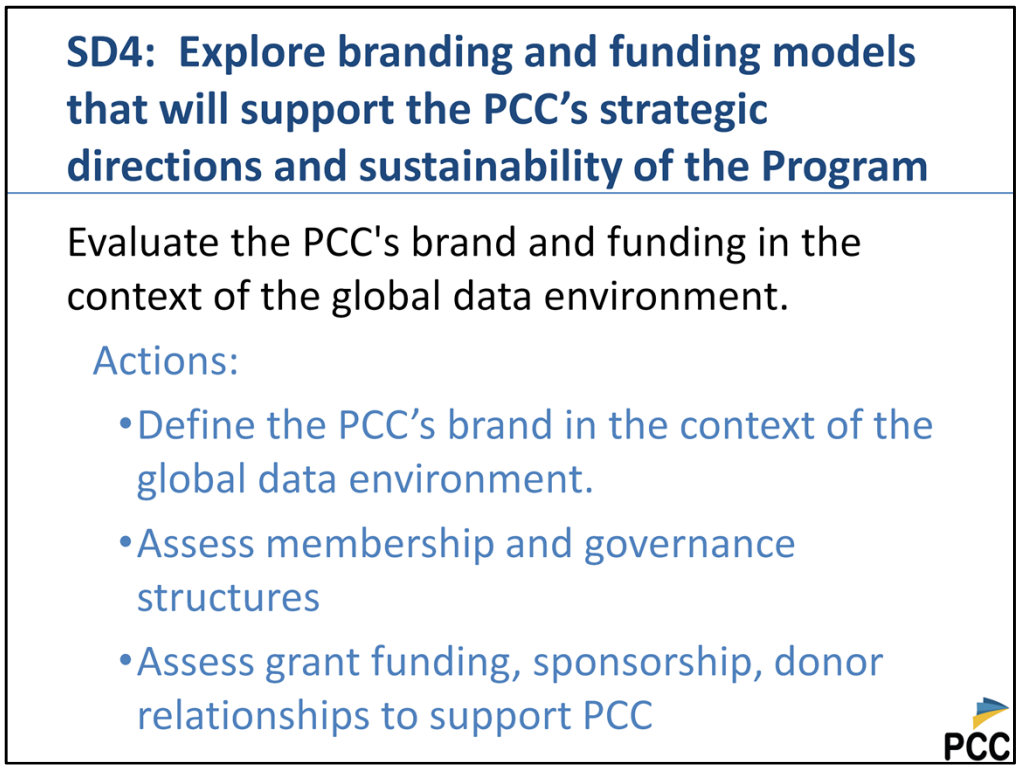
- Partnering with other agencies and communities (e.g., LC, OCLC, Sky River, W3C, ISNI, ORCID, code4lib, others) to explore models for and to build the infrastructures necessary to host the cooperative management of identities.



This Strategic Direction will also involve engaging with other communities (like BIBFRAME, JSC, FRBR, others) that are attempting to define which work-level data are essential to allow work records to serve as authorities for resources. This was the action item that garnered the most discussion and debate from all of the groups that reviewed drafts of the plan. The idea for this action item originated from a statement made by Regina Reynolds during the planning session in November, suggesting that the PCC: (1) re-envision the bibliographic record as an authority for a resource, consisting of metadata statements and identifiers that uniquely identify, rather than merely describe resources; (2) determine whether the authority should be at the work/expression or manifestation level, or both, and; (3) determine which statements are needed for bibliographic authorities to identify resources explicitly, at scale, and with a minimum of redundancy.

During our various review stages, there was a recognition that PCC is not the only organization discussing this complex issue, and should be working more closely with those communities. The result was a transformation of this action item into one that is currently much broader, and somewhat less directive. There is a recognition that it still needs to be fleshed out more effectively, and for now, it serves as a placeholder for SCS and others to form into an action item (or series of actions) that articulate the issues and the roles we see for PCC as producers of work-level metadata. This may well include activities that result in the crafting of a white paper that frames the discussion and provides a course forward.

And, finally, this SD includes an action item to look at ways to broaden community participation in the creation of identifiers and authority data. This action item was added to the plan at the suggestion of the PCC Advisory Committee on Initiatives, advocating that PCC explore the feasibility and phasing of an initiative to expand the ranks of those who create identifiers and contribute authority data, perhaps a level of NACO membership that focuses specifically on the creation of identifiers.



Strategic Direction 4 is: "**Explore branding and funding models that will support the PCC's strategic directions and the overall sustainability of the Program**."

Much of the PCC's focus to date has been on sharing catalog records, reducing costs across our institutions, and to those ends, providing metadata experts with guidance on the application of well-established library data standards, vocabularies, and communication formats. As the community incorporates additional standards and schemas into workflows for describing a wide variety of resources, in a wide variety of discovery environments, and as information technologies facilitate our management of these resources, there is also an opportunity for the PCC to broaden its focus beyond RDA, MARC, and LC vocabularies. The PCC will engage in a process to assess how these expanding directions of PCC activity will challenge the current branding of the PCC, and will explore whether opportunities exist for securing external funding to help grow and sustain both the program and its members.

Actions items for this Direction will include:

- Looking at the PCC's brand in the context of the global data environment. Consider a name that reflects new, broader directions. Assess the impact of the strategic directions on the PCC's membership and governance structures.
- Seek grant funding, where appropriate, to support PCC initiatives (e.g., planning grant for transitioning the PCC into new data environments; tools development; training development).
- Consider means for acquiring sponsorships and developing donor support for some aspects of the PCC's programs and services.

Next Steps

- Get feedback from the PCC community
- Steering, Policy, and Standing Committees organize their approaches to action items
- Charge and establish task groups where needed; calls for participation
- Progress updates at PCC Operations Meeting (May 7); ALA Annual (June 28); via the PCC lists
- Continual assessment of the directions, action items, and progress made

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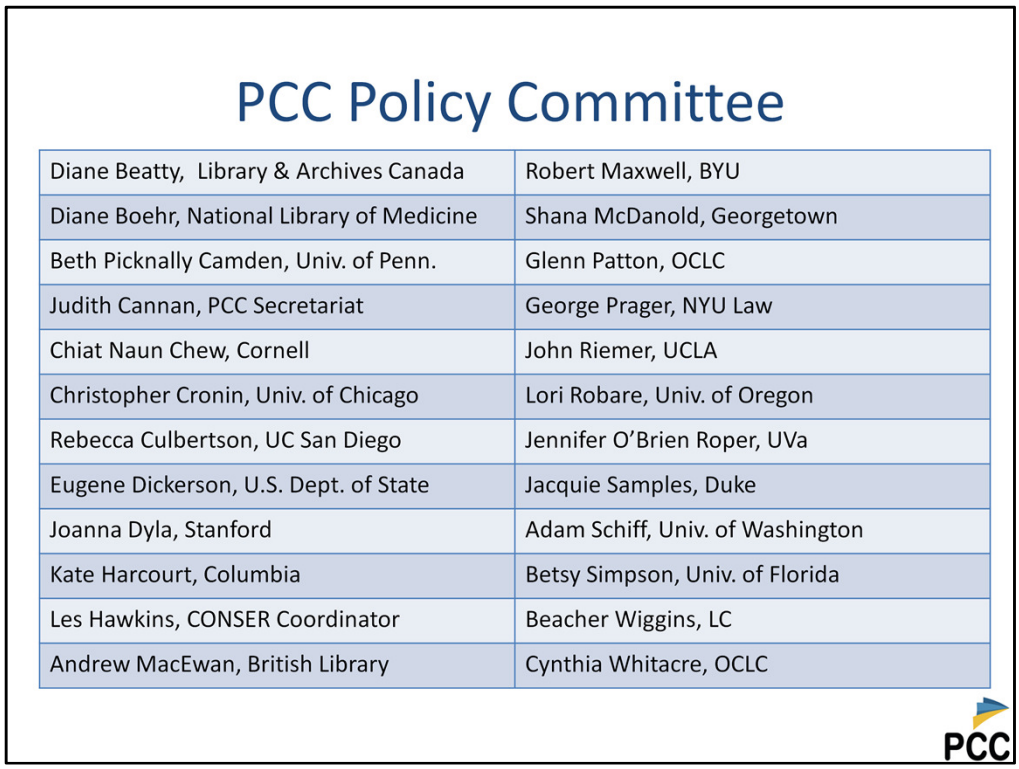

Many people from the community have contributed to this work and we thank them all for their engagement throughout the process. Thanks to the PCC Policy Committee, but also to members of each of the Standing Committees that helped to develop and refine the vision, mission, directions and the action items, and to the authors of the white papers.

inspire
linked data
relevant
promote
role model
consult
tools
open
education
standards
integrated
learning
advocate
best practices
testbed
sandbox
grants
influence
partner
Semantic Web
trusted
profiles
expand
share
interpret
brand
train
global
value
lead
identities
PCC

Thank you!

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