

PCC (Program for Cooperative Cataloging) Strategic Directions January 2018-December 2021 (Extended to December 2022)

February 23, 2018

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VISION

The PCC is a diverse coalition of practitioners, service providers, and tool developers working together to harness the full potential of metadata to promote and sustain knowledge.

VALUES

Collaboration: We accomplish more together than we can on our own.

Sharing: We share metadata, expertise, training, standards, and best practices.

Innovation: We experiment, take risks, and learn by doing.

Empowerment: We put theory into practice and enable practitioners to leverage their skills in new environments.

Inclusion: We are strengthened by participation from all communities and diversity of viewpoints and experience.

Communication: We value consultation, responsiveness, and transparency.

MISSION

The PCC promotes the discovery and use of the world's knowledge by supporting metadata producers in library and other cultural heritage communities and by forging alliances with partners who share common goals. PCC members create trusted metadata and support its use and reuse by global communities.

The PCC:

- Leverages data models, vocabularies, and technologies in support of flexible, interoperable, and scalable production methods
- Enables the extension, iterative enhancement, reuse, and open exchange of metadata
- Develops, documents, and promotes best practice
- Advances initiatives by brokering agreements among stakeholders
- Empowers metadata practitioners through training, education, and current awareness
- Experiments with new technologies and develops tools for metadata creation and editing
- Partners with scientific and cultural heritage institutions, publishers, and vendors

STRATEGIC DIRECTIONS AND ACTIONS

In 2015, the PCC adopted a strategic plan that recognized the strengths of the organization in standards, quality, and metadata expertise and charted a course to move from a record-based

environment to one based on dynamic collections of metadata statements and identity management. Strategic directions focused primarily on extending the collective understanding of emerging technologies and connecting with other partners. Significant progress has been made in several areas, including work to accommodate URIs in our current MARC environment, awareness of requirements for viable linked data implementation and infrastructure models, and envisioning the role of the PCC in the emerging identity management environment. The PCC partnered with Linked Data for Production (LD4P) and the ISNI (International Standard Name Identifier) International Authority to experiment and pilot new approaches and also drew on the expertise of individuals outside the traditional PCC membership to better understand and align with practices in other metadata communities.

It is time to move beyond knowledge and skills related to linked data at a theoretical level and into implementation. Building on the PCC's strong tradition of providing training for metadata creators, active experimentation and piloting of linked data practices will help inform policy decisions, training, and operationalizing such practices. As we move to a culture of greater data sharing, it is crucial to extend our community, both by engaging a more diverse range of members in the work of the PCC and by collaborating with vendors, open source communities, and others.

Transitioning to a linked data environment provides new opportunities and highlights areas in which the PCC must evolve. It will involve changing practices, such as how we do name authority work or provide subject access, and reviewing legacy practices to determine what can be let go, to keep PCC work sustainable. To carry out our plans, we must ensure the effectiveness of the PCC as an organization: improving internal coordination, communication, and follow-through. In addition, the current nature of the PCC and its structure reflect its past rather than its future. That past is a stable, MARC-dominated cooperative environment rather than the emerging post-MARC, broadly collaborative environment. One key issue for the PCC is its legal status as an organization. Another issue is what it means to be a member of the PCC in this new environment.

The strategic directions and actions will be assessed and updated annually by the Policy Committee, or more frequently as circumstances require. In particular, the forthcoming changes to RDA will provide the impetus to reassess PCC practices for application of this standard.

The PCC Policy Committee voted in October 2020 to extend these strategic directions by another year from December 2021 to December 2022. Due to the COVID-19 pandemic appropriate planning for an entirely new set of strategic directions was not feasible in an all virtual environment. The Policy Committee did however decide to add a new *SD7: Incorporate Diversity, Equity, and Inclusion (DEI) principles to every aspect of PCC operations* at that point.

PCC members may consult the working document [PCC Strategic Directions Progress 2020-](#) for updates. Please note that this document is updated continuously and was originally designed for internal Policy Committee use.

SD1: Broaden our scope to be more diverse, inclusive, and collaborative with metadata creators in research and cultural heritage communities and with other agencies and project partners

The PCC is acknowledged as a leader in standards and training but it must become a thought leader as well. As the community continues to evolve by incorporating additional standards, schemas, and tools into its workflows, as well as new methods and models of collaborating, it is critical both to ensure that

all those in our community are brought along and that we continue to reach out to other communities to learn from their ideas and expertise. During the period 2015-2017, the PCC embraced the transition to linked data. It is time now to consolidate lessons learned and create a cultural infrastructure that supports inclusion, collaboration, and learning.

Actions

1.1 Using our Values Statement as a starting point, establish a Task Group charged to assess PCC's strengths and weaknesses as an organization. Consider ways to increase membership participation and broaden PCC's skill base and community of practice. Specifically:

1. Identify PCC initiatives and areas of activity that resonate with other communities and incorporate outreach into those efforts
2. Explore alternative models for membership (e.g. moving beyond production targets, including individual participation)
3. Expand liaisons to cover a wider range of partner communities
4. Increase the inclusiveness and diversity of the membership
5. Work to expand international participation

Who: Volunteers from Policy Committee & PCC membership on a Task Group

Timeline: Year 1

1.2 Create more timely, collaborative, and wide reaching mechanisms for learning and innovation that are easily shared and sustained. Seek out and implement specific avenues such as webinars, conference speakers, hackathons etc. for sharing information with other communities (e.g., Wikidata, ORCID) to increase our visibility and foster information exchange.

Who: Steering, Policy Committee, consult with the Linked Data Advisory Committee

Timeline: Year 2-5

SD2: Maximize PCC's operational effectiveness

The PCC today operates in a complex, interconnected, and rapidly evolving environment. As a cooperative it must be responsive to the interests and concerns of stakeholders and ensure that it is coherent in its overall direction and decisive in its actions. It is also critical to PCC's success as a volunteer organization that it maximizes the return on the effort invested by its members.

Actions

2.1 Institute a transparent, consultative, and timely decision-making process. Develop a formal consultation and review process that ensures accountability, adequate feedback along the way, and timely response to or implementation of recommendations.

Who: Steering, Policy Committee

Timeline: In progress

2.2 Adopt agile techniques that encourage experimentation and iterative development.

1. Explore models for agile project management.

Who: Steering, Standing Committee on Training, or possibly specially charged group

Timeline: Year 1-5

2. Identify further opportunities for pilot projects.

Who: Steering, Standing Committees, Linked Data Advisory Committee

Timeline: Year 1-5

3. Consider instituting a beta phase for new projects, tools, and practices that allows experimentation and feedback.

Who: Policy Committee

Timeline: Year 1-5

2.3 Improve coordination of related efforts among PCC groups.

1. Monthly calls (already happening, but consider how to make them work best in terms of membership, participation, documentation, etc.).
2. Make better use of liaisons (more consistent reporting out, etc.).
3. Make better use of collaboration tools.

Who: Policy Committee

Timeline: Year 1-5

2.4 Streamline documentation and improve its searchability and visibility for ease of maintenance and use. Explore creation of a general PCC working/collaborative space.

1. Charge a task group to identify needs and audiences served by PCC documentation and make recommendations for appropriate platforms and best practices.

Who: Task Group reporting to Policy Committee, with Standing Committee on Training & Standing Committee on Standards

Timeline: Year 2-5

2.5 Appoint a volunteer PCC Communications Group to explore communication practices and tools to reach out and engage with the broader community. Consider blogs, committee updates to the PCC discussion list, web forums, etc. Communication channels will be developed to and from the PCC community, between task groups and committees, and outward to other communities.

Who: Steering

Timeline: Year 1

SD3: Apply understanding of linked data

In order to define best practices and realize the benefits of linked data, the PCC will provide opportunities for practical, hands-on experimentation in both linked data and hybrid MARC/linked data environments. Sandboxes in which PCC members can create RDF data according to PCC guidelines will help inform decisions about policy and training. A shared, interactive space for experimenting, learning, and collaborating could enable PCC members to learn about linked data initiatives and tools and foster community exchange of ideas. In addition, the PCC will facilitate the incorporation of linked data and associated practices into current production environments (see related work in SD5). The PCC will continue its strong tradition of providing training to assist the community's transition to a linked data environment and to support different paces of adoption, as there will be a period of overlap in PCC members' production of MARC data and native linked data.

Actions

3.1 Partner with LD4P to develop a sandbox for experimentation in the creation of RDF data according to PCC guidelines.

1. Explore ways to act on mappings developed by the PCC BIBFRAME Task Group, to reinterpret

the BIBCO Standard Record and CONSER Standard Record in a linked data context, and to investigate the concept of PCC quality in a recordless environment.

2. Investigate policy and training needs in both the transition to linked data and in a mixed MARC/linked data environment.

Who: Policy Committee work with PCC Linked Data for Production cohort group

Timeline: Year 1-3

3.2 Explore the feasibility of creating a shared interactive space for experimenting with and implementing linked data beyond BIBFRAME and the LD4P sandbox.

1. This shared space could include documentation of application profiles, lists of tools, end-user environments, a directory of initiatives, and/or ontology vetting.
2. Collaboration with vendors will help ensure that tools meet the community's needs and demonstrate to vendors the demand for these tools.
3. This space should help articulate the value of linked data on the supply side and in the discovery environment.
4. This will be a visible, interactive space for engagement and will serve as a connector for various PCC initiatives and resources related to linked data.

Who: Joint task group involving Standing Committee on Applications, Standing Committee on Training, and Linked Data Advisory Committee

Timeline: Year 3-5

3.3 Extend previous work to develop a curriculum that will advance the community's understanding of linked data and develop training for incorporating linked data and associated practices into current production environments.

Who: Standing Committee on Training, in collaboration with Standing Committee on Standards and Linked Data Advisory Committee

Timeline: Year 2-5

3.4 Review current practices in cataloging and authority work to assess their impact and continuing value in a linked data environment and, where applicable, explore feasible alternatives. (See also specific directions set out in SD4 and SD5.)

1. Develop linked data use cases for NACO data. Identify functional requirements and propose best practices that will support them.
2. Identify high-value external data sources and propose strategies for leveraging them to augment PCC metadata.

Who: Policy Committee; Steering

Timeline: Year 2-5

SD4: Accelerate the movement toward ubiquitous identifier creation and identity management at the network level

We aspire to attain an environment where identity management work activity is characterized by much greater proportions and numbers of entities receiving identifiers; many non-NACO institutions participating; and strategic partnerships and collaboration existing among cultural heritage organizations, rights management agencies, Wikidata, and others. We expect to find ways in a linked data environment where collaboration on identity management can interoperate across multiple data sources. Attainment of this vision will increase both human and machine usage of this data and its

overall value.

Actions

4.1 Lower barriers and expand the community doing identity management work within the framework of the PCC with support and training. Further define what is meant by the “NACO Lite” concept and review standards for minimal requirements.

Who: PCC Task Group on Identity Management in NACO; Standing Committee on Training

Timeline: Year 1-2

4.2 Develop a pilot using identifiers in place of or in addition to text strings.

Who: PCC Task Group on Identity Management in NACO; Policy Committee;

Steering

Timeline: Year 2-4

4.3 Collaborate with other identity management communities to facilitate and promote the use of unique identifiers.

1. Evaluate the results of the ISNI pilot and plan next steps for bringing the pilot into production.

Who: PCC ISNI pilot libraries; Steering; Task Group?

Timeline: Year 1

2. Identify common goals and interests, best practices, and technology to support reuse, aggregation, and sharing of data.

Who: Standing Committee on Applications; Standing Committee on Standards

Timeline: Year 2-5

3. Investigate policy and governance issues related to participation in a program-like operation for ISNI, VIVO, ORCID, Wikidata, and other non-NACO identifiers.

Who: PCC Task Group on Identity Management in NACO; Policy Committee; Steering

Timeline: Year 2-5

SD5: Expand use of linked data value vocabularies to augment, and where feasible to replace, existing metadata practices

Linked data vocabularies such as OCLC’s FAST, NLM’s MeSH, Getty’s AAT, and LC’s faceted vocabularies are purpose-built for wide reuse and interoperability. The movement towards linked data provides an opportunity to review PCC practices to take full advantage of these vocabularies. Identity management (covered in SD4) is a prime area of opportunity for a transition to use of linked data, but similarly compelling opportunities exist in other areas such as subject, geographical, genre/form, and demographic data. The ALA Subject Analysis Committee’s report *A Brave New (Faceted) World* offers a useful starting point for many aspects of this effort.

Actions

5.1 Expand adoption of FAST.

1. Produce and document implementation strategies for libraries wishing to adopt FAST 2.

Partner with OCLC on a roadmap for enhanced tools and services, and a governance model for ongoing development of FAST.

Who: Cohort of FAST adopters in collaboration with Steering

Timeline: Year 2-5

5.2 Institute a process for endorsing vocabularies for PCC use, developing best practices and documentation, and identifying any further steps required.

Who: Steering, Standing Committee on Standards, Standing Committee on Training, Linked Data Advisory Committee, specialist communities (ACRL Rare Books and Manuscripts Section, Music Library Association, etc.)

Timeline: Year 2-5

5.3 Review legacy practices to identify areas where adoption of linked data would offer advantages and propose transition strategies.

Who: Standing Committee on Standards, Standing Committee on Applications, collaborate with ALA Subject Analysis Committee?

Timeline: Year 2-5

5.4 Develop and implement strategies for targeted enhancement of legacy metadata with linked data vocabularies.

Who: Standing Committee on Applications, specialist communities, OCLC?

Timeline: Year 2-5

5.5 Provide input to metadata editor development at LC, LD4P, and other venues to maximize the use of linked data vocabularies.

Who: Library of Congress, LD4P partners

Timeline: Year 2-5

5.6 Promote routine use of URIs in PCC cataloging in place of or in addition to text strings.

Who: PCC Task Group on Identity Management in NACO

Timeline: Year 2-5

SD6: Bolster resources for PCC to support the PCC's strategic directions and the overall sustainability of the Program

The current nature of the PCC as an organization and its structure reflect its past rather than its future. In the next few years, the PCC needs to act on several fronts identified in the previous and current strategic plans. Key issues for the PCC include its legal status as an organization, its governance, and its ability to raise and apply resources.

Actions

6.1 Create a task force to investigate how other organizations meet these challenges and to evaluate pros and cons of specific models for the PCC becoming a legally recognized entity and make recommendations.

Who: Steering and Policy Committee will create the task force

Timeline: Year 1

6.2 Assess the impact of the strategic directions on the PCC's membership, contribution, and governance structures.

1. Define what it means to be a PCC participant in a linked data environment and to create quality data.
2. Review legacy practices to determine what can be let go, to keep PCC work sustainable.

Who: Steering, Policy Committee
Timeline: Year 2-5

6.3 Seek grant funding and consider means for acquiring sponsorships and developing donor support for some aspects of the PCC's programs and services.

Who: Steering, Policy Committee
Timeline: Year 3-5

SD7: Incorporate Diversity, Equity, and Inclusion (DEI) principles to every aspect of PCC operations

PCC is committed to incorporating DEI principles (including accessibility) in its work. We recognize that working with a diverse pool of individuals broadens our perspective and enriches our work.

Actions

7.1 Charge an Advisory Committee for making DEI and metadata ethics an integral part of PCC work.

Who: Policy Committee
Timeline: Year 4

7.2 Increase awareness of DEI issues as they relate to cataloging and to the PCC.

Who: PCC
Timeline: Ongoing

7.3 Formulate a statement of DEI principles for libraries to use regarding their metadata.

Who: PCC Advisory Committee on Diversity, Equity, and Inclusion with Policy Committee
Timeline: Year 4

7.4 Increase diversity of membership on PCC committees and task forces.

Who: All PCC committees (including Policy Committee and future nominating Committees), task forces, and individual programs (when they create task forces, committees, etc.)
Timeline: Ongoing

1. Survey PCC committees and task forces to determine current level of diversity.

Who: Policy Committee assisted by all PCC committees, task forces, and individual programs
Timeline: Year 4

7.5 Explore partnerships with other organizations and institutions to participate in and promote DEI initiatives.

1. Compile list of organizations for potential partnerships.

Who: PCC Advisory Committee on Diversity, Equity, and Inclusion with PCC Policy Committee
Timeline: Year 4 (reviewed annually)

2. Reach out to other organizations (including but not limited to CFLA Indigenous Matters Committee, OCLC, LD4 Ethics in Linked Data Affinity Group)

Who: Policy Committee

Timeline: Year 4-5