

PCC (Program for Cooperative Cataloging) Strategic Directions

January 2023-December 2027

March 9, 2023

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 welcome and are strengthened by participation from all communities and diversity of viewpoints and experience.

Communication: We value consultation, responsiveness, and transparency.

MISSION

The PCC promotes 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. The PCC embraces diversity, equity and inclusion in its membership, activities and practices. 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 metadata production methods
- Enables the extension, iterative enhancement, reuse, and open exchange of metadata
- Leads the community by developing metadata documentation and training, and promotes best practices for use by all practitioners
- Advances initiatives by brokering agreements among stakeholders
- Empowers metadata practitioners through training, education, and current awareness
- Experiments with new technologies and encourages the development of tools for metadata creation and editing
- Partners with scientific and cultural heritage institutions, publishers, and library industry leaders to further advance cataloging community goals.

STRATEGIC DIRECTIONS AND ACTIONS

These strategic directions are based on input from the PCC community gathered during a discussion at the ALA Annual Conference in June 2022, as well as from a survey conducted via the PCCLIST. Further discussion and brainstorming occurred during a facilitated session at the Library of Congress in November 2022, held in conjunction with the PCC Policy Committee’s annual in-person meeting. The draft plan was then shared with the PCC community at the virtual PCC Participants Meeting on February 23, 2023 and approved by the Policy Committee on March 9, 2023.

The strategic directions and action items will be assessed annually and updated as needed by the Policy Committee, or more frequently as circumstances require. PCC members may consult the working document [PCC Strategic Directions Progress 2023-](#) for ongoing updates regarding specific action items. Please note that this document is updated continuously and was originally designed for internal Policy Committee use.

SD1: Engage with broader communities of metadata stakeholders

As the PCC takes further steps beyond its historically inward-facing and MARC 21 focus, it must engage with broader communities on a consistent basis. In recent years, it has already begun to do so by inaugurating partnerships with ISNI (International Standard Name Identifier), Share-VDE (Share Virtual Discovery Environment) and other communities, and by experimenting with and piloting reimagined metadata practices that go beyond historical MARC limitations. Over the next several years, the PCC must enhance its efforts to collaborate with other organizations aligned with its goals. This includes GLAM (galleries, libraries, archives and museums) metadata communities, as well as non-GLAM and vendor communities. Additionally, user experience (UX) considerations must become a driving factor for future developments in library metadata norms. The PCC must take proactive steps to break down functional silos and grapple more directly with the discovery needs of the users of the resources we describe.

Actions

- 1.1. Broaden collaborative efforts with the library software and metadata providers, including both vendors and open source communities, keeping in mind accessibility and universal design principles
 1. Establish a consultation group to allow for more robust reciprocal communication between the PCC community and the organizations who develop software that supports metadata functionality and/or produce metadata for libraries (this includes both for-profit companies and not-for-profit organizations)
 2. Advocate with providers for software developments that improve functionality for both library users and library personnel, while staying attuned to the practical system limitations articulated by those vendors
 3. Advocate for cutting-edge improvements without the loss of critical time-tested online catalog (OPAC) functionalities
 4. Revise and expand the array of resources promoted by PCC for the benefit of providers
 5. Ensure that all PCC policies and practices under development are generally compatible with functionality available in library service platforms that are in common use by the library community
 6. Investigate methods for endorsing certain categories of vendor-created metadata as “PCC

acceptable”

Who: Policy Committee (PoCo)

Timeline: Year 1 or 2

1.2. Communicate with GLAM metadata communities outside of traditional libraries, as well as metadata communities outside of GLAM

1. Facilitate collaborations with non-GLAM metadata communities whose goals are aligned with the PCC (such as open-access digital humanities ventures); actively seek participation by representatives from these communities in PCC groups and pilot projects
2. Encourage non-GLAM communities to utilize vocabularies created and maintained by GLAM communities

Who: PoCo, Standing Committee on Standards (SCS)

Timeline: Year 1-5

1.3. Build a knowledge base of user experience (UX) norms in the library community and how they impact resource discovery

1. Maintain awareness (through periodic environmental scans) of how MARC and non-MARC metadata is displayed and made available for searching, faceting, etc. in a variety of library discovery environments, paying special attention to how well these environments incorporate accessibility and universal design principles
2. Consider creating and maintaining a bibliography of user studies in order to bolster collective knowledge of user needs and expectations (i.e., go beyond relying on anecdotal evidence and broad assumptions)
3. Actively seek knowledge about UX needs for a variety of user personas, including those of different disciplines, education levels, linguistic background, format needs, etc.
4. Engage with vendors (see Action item 1.1) to ascertain how UX norms inform their product development; actively seek common ground and shared understanding/values

Who: PoCo, Standing Committee on Applications (SCA)

Timeline: Year 2 or 3

SD2: Promote a culture of technological pluralism and sustained relevance

Library metadata practices have begun to diversify in recent years, with some institutions embracing Linked Data technologies while others will largely retain MARC-based workflows for the foreseeable future. Not all institutions can or wish to embrace new technologies at the same pace in this transition period, and yet the PCC must welcome participation from and support the needs of both early adopters of emerging practices as well as maintainers of established practices. In this era of technological pluralism and increasing interest in Linked Data principles, shareability of metadata is paramount. The PCC should focus its efforts in the coming years to promote interoperability of metadata and continue to de-emphasize the cosmetic aspects of the illusory “perfect” bibliographic or authority record. A relevant, sustainable cooperative is one where our collective intellectual, value-added work is harnessed as efficiently and scalably as possible.

Actions

2.1. Support the creation and sustainable development of high-quality metadata in a variety of encoding formats/structures/serializations, including MARC, BIBFRAME and other standards

1. Ensure documentation includes sufficient instruction to facilitate the implementation of

policies and practices in both MARC and non-MARC environments

2. Continue to pursue interoperability of metadata encoded using different structures
3. Create and maintain mappings between different metadata schema and ontologies in use by PCC members
4. Pursue structural improvements to MARC formats that advance interoperability, such as the allowance of Unicode in the LC/NACO Name Authority File (NAF)
5. Emphasize the benefits of Linked Data practices to the extent supported by the encoding structure; promote the benefits of Uniform Resource Identifiers (URIs) over crafting unique text strings e.g., for precisely identifying an entity, for maintenance stemming from terminology changes

Who: SCS, SCA, SCT, Linked Data Advisory Committee (LDAC)

Timeline: Year 1-5

2.2. Continue to build a community of practice that supports identity/entity management workflows alongside traditional MARC-based authority control

1. Encourage and facilitate widespread use of URIs in MARC authority records for persons, organizations, places, works and other entities, as well as in MARC bibliographic records
2. Encourage broader PCC member participation in ISNI, Wikidata and similar emerging Linked Data-based ventures, as activities that form a part of a holistic, reimagined standard cataloging workflow
3. Create an identity management PCC program that functions in parallel with the Name Authority (NACO) and Subject Authority (SACO) programs; recruit for and promote this program broadly
4. Utilize and, where needed, advocate for reconciliation services to support URI-based linkages between data sources traditionally focused on by the PCC and other data sources where we want strategic connections
5. Advocate for the improvement of real-time availability of LC-hosted Linked Data to external services used for metadata creation and reconciliation

Who: SCS, Identity Management Advisory Committee (IMAC)

Timeline: Year 1-5

2.3. Enable the ongoing effective use of *Resource Description and Access* (RDA) by a broad community of metadata practitioners with varying levels of experience and training

1. Maintain robust and modular policy statements, metadata guidance documentation and other training materials for use with the Official RDA Toolkit (released 2020)
2. Maintain transparent processes for tracking changes to and for considering community feedback about PCC RDA documentation
3. Proactively seek feedback about PCC RDA documentation, giving special weight to the perspectives of those with less deep expertise and “insider” knowledge
4. In writing and structuring documentation, emphasize practical usability as well as task-based content that is optimized for just-in-time information seeking by time-pressed metadata practitioners
5. Continue supporting flexible and extensible policies on shared metadata packages (e.g., bibliographic records) that “hybridize” different content and encoding standards
6. Sustain and expand efforts to remediate legacy metadata for RDA and Linked Data compatibility

Who: SCS, Standing Committee on Training (SCT)

Timeline: Year 1-5

2.4. Emphasize the high-impact aspects of cataloging work such as unique entity identification, entity relationships, subject analysis, use of faceted and other controlled vocabularies, and classification

1. De-emphasize the pursuit of cosmetic/stylistic consistencies that lie outside of these high-impact areas, such as practices that do not directly impact the end user or that are duplicative
2. Facilitate the implementation (both current and retrospective) of faceted vocabularies (e.g., Faceted Application of Subject Terminology (FAST), Medical Subject Headings (MeSH), Library of Congress Genre/Form Terms (LCGFT), LC Demographic Group Terms (LCDGT), LC Medium of Performance Thesaurus (LCMPT)) at the network level
3. Evaluate, and as appropriate endorse for broader use, Linked Data vocabularies that lie outside of Library of Congress vocabularies, starting with vocabularies that: originate in other national libraries; support diversity & inclusion; are developed and maintained by expert communities; and/or meet any other important criteria

Who: SCS, SCT, LDAC

Timeline: Year 1-5

2.5. Incorporate user experience (UX) and accessibility best practices into PCC metadata policies

1. Ensure that the PCC considers the intended benefits to the end user when developing new policies
2. Proactively sunset duplicative and/or underutilized metadata encoding practices (e.g., fixed fields that duplicate information elsewhere in a MARC record); where sunsetting practices is not feasible, encourage the development of metadata editing tools that minimize duplicative human data entry

Who: PoCo, SCS, SCA

Timeline: Year 2-5

SD3: Reinforce the vitality of the cooperative

As cataloging/metadata departments continue to shrink over time due to retirements and attrition, the talent pool of (current and prospective) PCC participants is negatively impacted. The PCC has an established track record of inviting participation from a broader pool of contributors through its funnel programs, which already carry a lower barrier to entry through reduced production requirements as compared to full institutional membership. That said, because the nature of metadata work is evolving, it no longer makes sense for the PCC to measure contributions in terms of MARC record statistics alone. Additionally, the PCC ought to redouble its efforts to recruit a larger, more diverse talent pool, who not only will be able to contribute via metadata production, but who can serve in the PCC's organizational structure as well. In doing this, the PCC will help cultivate future generations of leaders.

Actions

3.1. Redefine what it means to contribute to the PCC

1. Implement alternative models of contribution, including non-MARC metadata production and other metadata project work, alongside traditional MARC record production. This will allow member institutions additional ways to sustain the level of PCC participation expected of them

2. Establish membership criteria that are more flexible and transparent, and less focused on rigid production quotas
3. Investigate, and if appropriate implement, recommendations of the PCC task groups working in this area, for example the PCC Task Group on Required Contributions to the PCC

Who: PoCo

Timeline: Year 1-2

3.2. Actively seek greater participation from metadata practitioners that have been historically underrepresented in the PCC

1. Support individual participation in PCC programs outside of the auspices of institutional membership
2. Recruit broadly for committees, advisory groups and task groups, going beyond those large, well-staffed institutions that have historically participated extensively in PCC work
3. Ensure that specialist metadata communities (including but not limited to those with existing PCC funnels) have a voice in PCC decision making; promote and support funnels
4. Create opportunities for (and reduce barriers to) service to the PCC at all experience levels, from committee internships to mentoring for leadership

Who: PoCo

Timeline: Year 1-5

3.3. Establish and sustain ties with LIS graduate programs in order to recruit new professionals into PCC-level metadata work

1. Collaborate with graduate-level cataloging/metadata instructors to incorporate PCC practices and values into the curriculum
2. Promote the equitable emphasis of both MARC-based and non-MARC-based metadata work in LIS instruction
3. Encourage LIS programs to promote supplementary curricular content related to cataloging and metadata that goes beyond what they are able to offer in time-limited classroom instruction; this content could largely be based on PCC-created resources
4. Investigate the brokering of internship/field work opportunities between PCC institutions and LIS graduate programs

Who: PoCo, SCT

Timeline: Year 3-5

SD4: Transform the image of the PCC

The PCC has built a solid reputation of cataloging and metadata expertise and production of high-quality MARC metadata. However, many of its most active members come from a minority of (mostly larger, well-staffed and well-funded) institutions. As a result, colleagues from smaller and/or more specialized institutions, as well as those from institutions outside of the United States, Canada and the United Kingdom, may not see themselves reflected in the aims of the PCC. Additionally, as stated above under SD2, library metadata practices have begun to diversify in recent years, with some institutions embracing Linked Data technologies while others will largely retain MARC-based workflows for the foreseeable future. The PCC must be seen as a “big tent” where expertise, trainability and willingness to work for the collective good are more important prerequisites to membership and leadership than institutional “pedigree.” The broadening focus of the PCC itself also poses an opportunity to refresh its image and branding. Its four constituent

programs are rooted in MARC record production but the work of the PCC is no longer limited to those core activities. It is time for the PCC to reconsider how best to represent itself to the broader world.

Actions

4.1. Consider renaming and/or rebranding the PCC to better reflect its emerging initiatives that go beyond the historical four-fold (and MARC-based) array of programs (BIBCO/CONSER/NACO/SACO)

1. Emphasize the PCC's role in training and advocacy, in addition to its historical role as a group of expert metadata producers
2. Actively promote the PCC to communities of prospective participants, especially to those that may face barriers to engagement

Who: PoCo

Timeline: Year 2

4.2. Evaluate the workflow for charging and tracking the work of PCC task groups, building on the process improvements achieved through the implementation of the transmittal sheet

1. Ensure that any needed follow-up work is articulated and planned as thoroughly as possible before groups are discharged
2. Demonstrate that the PCC consistently follows through on the work of its task groups

Who: PoCo

Timeline: Year 1 or 2

4.3. Engage the PCC membership and broader communities of metadata practitioners (on a global level) to ascertain how the PCC is or isn't meeting the needs of its target membership base and other stakeholders (See also Action items 1.2 and 3.1)

1. Perform an environmental scan of work done by similar professional organizations (e.g., ALA Core), noting areas of overlap and redundancy; this may not only reveal opportunities for further collaboration, it will serve to prevent duplication of effort across communities
2. Perform targeted outreach of PCC members outside of the United States and Canada
3. Perform ongoing assessment of all external-to-PCC liaison roles

Who: PoCo

Timeline: Year 2 or 3

SD5: Assess and improve how the PCC stores and shares knowledge

The PCC possesses a formidable collective intelligence and memory, which it is often called to draw upon when considering future policies and priorities. Preserving and managing this wealth of knowledge is at times unwieldy. The PCC website (maintained by the PCC Secretariat at the Library of Congress) has recently been supplemented with a (collaboratively editable) wiki that can be used to organize knowledge of a more ephemeral nature. In order to optimize this environment, an intentional and holistic assessment is now indicated. Secondly, the collective memory of the PCC is preserved primarily in Word and PDF documents. This presents a vulnerability to this information's archival value, as its indexing and organization is inconsistent. Moving forward, the PCC should explore a multitude of ways to not only preserve its longstanding knowledge about library metadata practices for the benefit of future generations, but also to package current content effectively for a multicultural and multilingual audience. As metadata practices themselves continue to diversify, the

methods of transmitting skills and knowledge around those practices must also diversify to keep pace with present-day accessibility and usability norms.

Actions

5.1. Improve accessibility of both new and pre-existing PCC documentation and training materials, by exploring ways to make them amenable to different modalities of access (e.g., image-based, audio-based, screencasts, braille, etc.) and learning styles

1. Utilize content structures that enable both formal (classroom) and self-directed learning
2. Incorporate tests/quizzes that allow learners to self-assess

Who: SCS, SCT

Timeline: Year 3-5

5.2. Promote PCC documentation and training materials beyond traditional PCC communication channels

1. Emphasize that PCC-created content is usable by everyone, and not just intended for existing PCC members

Who: SCT

Timeline: Year 1

5.3. Develop a training/mentorship program that allows metadata practitioners of all backgrounds (regardless of PCC membership status) to engage with PCC expertise at the point of need

1. Consider adding interactive mechanisms to documentation that allow information seekers to seamlessly ask questions and seek additional help
2. Incorporate additional, innovative methods by which information seekers can ask for help (i.e., beyond the PCCLIST); such methods could include office/working hours, "Ask an Expert" webforms, etc.

Who: SCT

Timeline: Year 2 or 3

5.4. Continue to assess and optimize the organization of PCC documentation across multiple environments, including the [PCC website](#) and [PCC wiki](#)

1. Balance the need for version control with historical/archival value; emphasize current information over older/superseded information
2. Continually re-assess the structuring of information; streamline landing pages
3. Articulate the distinct and respective functions of the LC-hosted PCC website and newer PCC wiki
4. Thoroughly document processes for maintaining these web environments; incorporate skill redundancies and succession planning
5. Proactively identify and as needed rectify gaps in documentation (both current and historical)
6. In all of the above, emphasize accessibility and universal design principles

Who: PoCo, SCS, SCT

Timeline: Year 1-5

SD6: Assess and improve PCC operations through the lens of Accessibility, Diversity, Equity and Inclusion (ADEI) principles

As part of its last strategic plan, the PCC charged a new Advisory Committee on Diversity, Equity and Inclusion (DEIAC). This group has already made significant progress to advance ADEI ideals in all areas of PCC operations. As that group matures and continues to carry out its work, a new cultural and operational paradigm in the PCC will emerge. This paradigm must be continually assessed and refreshed to keep pace with the rapidly-evolving nature of ADEI work in the world at large. Thus, this strategic direction is a continuation and reinforcement of prior work rather than an entirely new area. The other strategic directions described in this document also incorporate ADEI principles where applicable.

Actions

6.1. Increase awareness of ADEI issues as they relate to cataloging and to the PCC

1. Consider revising the DEIAC's charge to explicitly include accessibility alongside other DEI principles

Who: PoCo, DEIAC

Timeline: Year 1-5

6.2. Promote the PCC statement of DEI principles for libraries to use regarding their metadata

Who: PoCo, DEIAC

Timeline: Year 1

6.3. Increase diversity of membership on PCC committees (including DEIAC) and task groups

1. Survey PCC committees and task groups annually to determine current level of diversity
2. Investigate and implement strategies to recruit more diverse membership, including utilizing PCC funnels as talent pools

(See also Action item 3.2)

Who: PoCo, DEIAC

Timeline: Year 1-5

6.4. Explore partnerships with other organizations and institutions to participate in and promote ADEI initiatives

1. Compile list of organizations for potential partnerships
2. Reach out to other organizations (including but not limited to National Indigenous Knowledge & Language Alliance-Alliance nationale des connaissances et des langues autochtones (NIKLA-ANCLA), OCLC, LD4 Ethics in Linked Data Affinity Group)

(See also Action item 1.2)

Who: PoCo, DEIAC

Timeline: Year 2 or 3

6.5. Build a knowledge base of metadata practices that have been or should be evaluated and possibly identified for harm-reducing remediation efforts (sometimes referred to as "critical cataloging," "reparative cataloging" or "reparative description")

1. Continually track the work of organizations, both within and outside the PCC, that identify and redress problematic subject headings and other vocabulary terms
2. Create an ever-growing repository of information about ADEI work related to ethics in cataloging/metadata (e.g., articles, white papers, websites, project wikis, etc.)
3. Determine how and when to boost the signal of such work happening externally to the PCC and encourage PCC members to participate in that work

4. Where appropriate, actively identify additional reparative efforts, taking care to avoiding duplication of effort with other communities

Who: DEIAC

Timeline: Year 1-5