

# Vision, Mission, and Strategic Directions

*January 2015-December 2017*

Revised: November 20, 2015

## 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:

- reconceiving our practices in terms of the changing information & technology environment;
- 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;
- developing tools and templates for metadata creation;
- fostering and experimenting with emerging technologies, such as linked data;
- encouraging work at the network level;
- ensuring that controlled vocabularies recommended for use in PCC standards are formally registered;
- employing technology creatively;
- collaborating with scientific and cultural heritage institutions, publishers, and vendors;
- partnering with projects and professional organizations in areas of mutual interest.

## Strategic Directions & Actions

Since its inception in 1994, the PCC has focused on producing bibliographic and authority records that adhere to accepted standards, facilitate shareability, and reduce cataloging costs across organizations. In this context, the PCC's emphasis on standards, quality, and developing a community of expert metadata providers is as crucial now as it has always been. The PCC remains committed to supporting the services already managed by the program (CONSER, BIBCO, NACO, SACO, funnels), as well as the ongoing training needs of the community in order to accomplish the goals of these programs in our current environment.

Current modes of cataloging focus largely on the provision of string-based descriptive and authority data that are isolated within library catalogs. While helpful for human users of our discovery environments, such data are not optimized for the web. As the community begins to develop new standards and mechanisms for making library data compatible with linked data structures, the PCC recognizes it has a unique role to play in advancing a common understanding of semantic querying and data structures across PCC institutions.

With much of the technical environment still in flux, the PCC will adopt iterative approaches to learning and decision making. To this end, these strategic directions are intended to focus specifically on how the PCC will invest in continuing education, experimentation, and other activities that will extend our collective understanding of emerging technologies, deepen the expertise of the community, and enable informed decision making. The PCC recognizes the need to connect with other partnership projects emerging in the community [e.g., [Linked Data for Libraries \(LD4L\)](#), and its successor initiatives]. The strategic directions and actions will, at minimum, be assessed and updated annually by the Policy Committee.

### **SD1: 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**

- 1.1** 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.

**Who:** Standing Committee on Training; Standing Committee on Automation.

**Status:** Initial environment scan is now [published](#).

**Timeline for next steps:** SCT is charged with continuing to keep this scan up-to-date over time, and actively keeping the cataloging community informed of training opportunities, especially in those areas where new training materials have not yet been developed. SCT should also assess opportunities for future collaboration with other related initiatives.

- 1.2 Work with CONSER and other potential partners to provide discussion platforms, sandboxes, and testbeds for experimentation with linked data standards and applications (e.g., BIBFRAME profiles and editors).

**Who:** Standing Committee on Training; Standing Committee on Automation.

**Timeline:** Initial progress report to Policy Committee by April 2016.

## SD2: 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, standards, 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.

### Actions

- 2.1 Establish a new advisory committee with representatives from projects and organizations that have been early experimenters with linked data (e.g., BIBFRAME, BIBFLOW, Harvard ISNI project, LD4L/its successor projects) to guide how the linked data movement will impact PCC standards and policies, and to target areas where PCC is ideally situated to make specific contributions to this evolution.

**Who:** New advisory committee reporting to Policy Committee.

**Timeline:** Steering will begin drafting a charge for and establishing the advisory committee in December 2015. Initial progress report to Policy Committee by June 2016.

- 2.2 Determine 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.

**Who:** Steering Committee; Policy Committee; Standing Committee on Automation.

**Timeline:** TBD, following the outcome of the Advisory Committee in SD 2.1.

- 2.3 Build on recommendations from earlier work on how to expand PCC metadata contributions beyond RDA and MARC (e.g.,

<http://www.loc.gov/aba/pcc/sca/documents/MODS-Final-Report.pdf>). Put these previous efforts in the context of new linked data opportunities, and undertake a current needs assessment to identify how PCC could contribute most effectively and strategically to metadata provision for digital collections.

**Who:** Standing Committee on Standards.

**Timeline:** TBD, Steering Committee will reassess the timing for this in June 2016.

- 2.4** Assess the impact of the linked data environment on metrics and reporting methods currently employed by PCC to measure contributions to the Program. In the absence of catalog “records,” determine what will be of sufficient value to count and why.

**Who:** Steering Committee; Policy Committee; PCC Secretariat.

**Timeline:** TBD, Steering Committee will continue to assess the appropriate timeframe for beginning this activity.

- 2.5** Form a task group to establish standards and guidelines for essential elements needed in converting existing MARC bibliographic and authority records/data to linked data formats to enable sharing.

**Who:** Standing Committee on Standards.

**Timeline:** TBD, PoCo will ask SCS to form this task group following initial recommendations coming out of the PCC Task Group on URIs in MARC.

### **SD3: 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**

Existing methods of library authority control are based on constructing unique authorized access points as text strings (literals). This string-based approach works somewhat well in the closed environment of a traditional library catalog, but not in an open environment where data are shared and linked, and so require unique identifiers. The web presents both a challenge and an opportunity for libraries, which are now in a position to take advantage of data created outside of the library world, and also to contribute library authority data for use by other communities. 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**

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

**Who:** Task Group reporting to Standing Committee on Standards (including liaisons from Policy Committee, Standing Committee on Automation).

**Timeline:** TBD, to be informed by the outcomes of the TG on URIs in MARC. Steering will evaluate need and timing for this group in June 2016.

- 3.2** Partner with other agencies, projects partners, and communities (e.g., W3C, ISNI, ORCID, code4lib) to explore models for and to build the infrastructures necessary to host the cooperative management of identities.

**Who:** Steering Committee; Policy Committee; Standing Committee on Automation.

**Timeline:** TBD, Steering believes this issues remains critical, but it is premature to address it; will continue to assess appropriate timing.

- 3.3** Produce a white paper to give a high-level outline of the issues surrounding the identification of work entities. This document should consider the contrasting conceptions of work entities emerging in different communities (e.g. BIBFRAME, JSC, PRESSoo, Zepheira serials group and others) and the implications of working with multiple data models. The white paper will explain the role work identifiers can play in a linked data environment, outline the modelling and metadata management issues they raise, and propose feasible options for the PCC to advance the provision and use of work-level metadata.

**Who:** Standing Committee on Standards to charge and establish a task group with input from the CONSER BIBFRAME Group and OCLC.

**Timeline:** Initial progress report to Policy Committee by June 2016.

- 3.4** Investigate options and develop a plan to expand community participation in the creation of identifiers and authority data.

**Who:** Task Group reporting to Policy Committee.

**Timeline:** Charge and timelines being drafted in December 2015, with the task group to be formed in January 2016.

#### **SD4: Explore branding and funding models that will support the PCC's strategic directions and the overall sustainability of the Program**

To date, much of the PCC's focus has been on 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 its workflows to describe 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**

- 4.1** Define 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.

**Who:** Steering Committee; Policy Committee.

**Timeline:** TBD, Steering Committee will evaluate timing for this activity in November 2016.

- 4.2** 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).

**Who:** Task Group formed, reporting to Steering Committee.

**Timeline:** Timeline to be established by the group; asked to do an environmental scan of grant opportunities as a first step, and provide status updates to Steering Committee in advance of ALA MW 2016, OpCo 2016, and ALA Annual 2016.

- 4.3** Consider means for acquiring sponsorships and developing donor support for some aspects of the PCC's programs and services.

**Who:** Steering Committee.

**Timeline:** TBD, Steering Committee will evaluate timing for this activity in November 2016.