

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

February 23, 2018

Revised January 24, 2019

Revised April 2021

OUTCOMES AND ACCOMPLISHMENTS

For full context and description of strategic directions, see the [official document](#).

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

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

Accomplishments related to 1.1

- Charged Task Group on Engagement and Broadening the PCC Community ([Final report](#))
- Added intern positions to standing committees
- Added PCC liaisons to
 - ALA Core SAC Subcommittee on Faceted Vocabularies
 - ShareVDE Advisory Council
 - OCLC FAST Policy and Outreach Committee
- Updated guidelines for PCC Liaisons (in the [Governance Document](#))
- [FAST training](#) created by the Standing Committee on Training (SCT)
- Formed [FAST SACO funnel](#)
- Spanish-language translations of [LRM training modules](#) created by SCT
- Convened [BIBFRAME data exchange meeting](#), which incubated the new [BIBFRAME Interoperability Group](#) (BIG)
- PCC and LC consulted about a possible joint ISNI membership
- Charged Task Group on Required Contributions to the PCC ([Preliminary report](#))
- Convened [virtual PCC meeting on Diversity, Equity and Inclusion](#)
- Created new [Advisory Committee on Diversity, Equity and Inclusion](#) (see SD7 below for accomplishments)
- PCC members have presented at international conferences such as SWIB, DCMI, etc.
- Have appointed more Canadian colleagues to PCC groups in recent years

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

Accomplishments related to 1.2

- A group of PCC leaders published several articles in *Cataloging & Classification Quarterly* regarding PCC operations during the COVID-19 pandemic
- Operations Committee (OpCo) annual meetings offered virtually in 2020-2022
 - OpCo held in person in 2019, but with a streaming option
- Annual and Midwinter PCC Participants Meetings offered virtually in 2020-2022
- Created [Wikidata Pilot](#), whose membership included participants from outside the PCC
- Endorsed [PCC Wikidata Affinity Group](#)
- Created [PCC Sinopia Cataloging Affinity Group](#)
- The Linked Data Advisory Committee (LDAC) hosted a forum “Perspectives on Wikidata”

SD2: Maximize PCC’s operational effectiveness

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

Accomplishments related to 2.1

- Created a [template](#) for task group charges and [transmittal form](#) for tracking TG work
- Revised the [guidelines](#) for task groups
- Created a tracking spreadsheet for active and recent task groups (for internal use by PCC leadership)
- Convened the [PCC RDA Communications Committee](#)
- Beginning in 2022, have issued open membership calls for most task groups and committees
- Created a new [PCC wiki](#) for sharing documentation that is not yet posted to the official PCC website

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

Accomplishments related to 2.2

- Convened a new [NACO Advisory Group](#)
- Assessment incorporated into task group and pilot sunseting process
- SCT experimented with different ways of forming task groups
- Created pilot projects for
 - [ISNI](#)
 - [URIs in MARC](#)
 - [Wikidata](#)
- Added interns to standing committees as a pilot program
- IFLA liaison pilot
- Conducted a [feasibility study](#) for conventional collective titles
- Charged a [task group](#) to test the Official RDA Toolkit

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

Accomplishments related to 2.3

- Standing committees, and advisory committees now report at monthly PoCo calls to keep all informed of ongoing work.
- Convened the [PCC RDA Communications Committee](#)
- Updated guidelines for PCC Liaisons
- Added PCC liaisons to
 - ALA Core SAC Subcommittee on Faceted Vocabularies
 - ShareVDE Advisory Council
 - OCLC FAST Policy and Outreach Committee
- Google Drive now used comprehensively for PoCo and Steering documentation, agendas, etc.
- Created a new [PCC wiki](#) for sharing documentation that is not yet posted to the official PCC website

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

Accomplishments related to 2.4

- Convened the [PCC RDA Communications Committee](#), who maintains a public tracking spreadsheet for proposed changes to RDA policy documentation (policy statements, metadata guidance documents)
- Created a new [PCC wiki](#) for sharing documentation that is not yet posted to the official PCC website

- Prepared the new 4th edition of the [NACO Participants' Manual](#)

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

Accomplishments related to 2.5

- Convened [PCC Communications Board](#) as a pilot in 2018; the board issued quarterly newsletters (The "Comm Channel") through 2020, at which point the group was sunsetted
 - As of late 2022, centralized PCC communications are handled via quarterly updates from the PoCo Chair, as well as the RDA Communications Bulletin issued by the [PCC RDA Communications Committee](#)

SD3: Apply understanding of 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

Accomplishments related to 3.1

- PCC members participated in the [Linked Data for Production: Closing the Loop \(LD4P3\)](#) project
- [Sinopia linked data editor](#) now available for use/testing by PCC members
- Charged a Task Group on PCC Sinopia Application Profiles ([final report](#)) and later a general Working Group on Metadata Application Profiles ([interim report](#))
- Charged task groups to Support Expansion of PCC Cataloging in Sinopia ([final report](#)) and to Implement Sinopia Expansion Recommendations ([final report](#))
- Charged Task Group on Linked Data Best Practices ([final report](#))
- [Sinopia training modules](#) created by SCT
- Created [PCC Sinopia Cataloging Affinity Group](#)

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

Accomplishments related to 3.2

- Created [Wikidata Pilot](#)
- Created [PCC Sinopia Cataloging Affinity Group](#)
- Created OCLC macros for adding and removing ISBD punctuation
- OCLC created an [API](#) for adding FAST terms as linked data
- OCLC's Shared Entity Management Infrastructure (SEMI) has an [Advisory Committee](#) with PCC members
- [Sinopia linked data editor](#) now available for use/testing by PCC members; API for export has been developed
- PCC data ingested into [Share-VDE](#)

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

Accomplishments related to 3.3

- [LRM training modules](#) created by SCT
- [Sinopia training modules](#) created by SCT
- The [PCC Sinopia Cataloging Affinity Group](#) conducts training sessions as part of its meetings and working hours

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

Accomplishments related to 3.4

- Charged Task Group on MARC Simplification for BIBFRAME Conversion ([Final report](#))
- Task Group on URIs in MARC issued document "[Formulating and Obtaining URIs](#)"
- [URIs in MARC](#) Pilot included an authorities subgroup that explored NACO issues
- [Wikidata](#) Pilot has explored "NACO lite" use cases
- PCC data ingested into [Share-VDE](#) and enriched with linked data from other sources as

part of the process

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

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

Accomplishments related to 4.1

- Created [Wikidata Pilot](#)
- Experimented with a SACO Wikidata Funnel

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

Accomplishments related to 4.2

- Created [URIs in MARC Pilot](#)
- Created [Wikidata Pilot](#)

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

Accomplishments related to 4.3

- Voted to extend [ISNI pilot](#) in 2020
- Ongoing collaborations with Wikidata community
- Convened [BIBFRAME Data Exchange meeting](#) in September 2021
- Standing Committee on Applications (SCA) developed [mapping](#) between Wikidata and MARC 21 Authority Format
- Held [Wikidata workshop](#) at 2019 Operations Committee meeting
- OCLC's Shared Entity Management Infrastructure (SEMI) has an [Advisory Committee](#) with PCC members

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

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

Accomplishments related to 5.1

- PoCo issued a response to the ALCTS CaMMS Analysis Committee's white paper "[A Brave New \(Faceted\) World: Towards Full Implementation of Library of Congress Faceted Vocabularies](#)"
- [FAST SACO Funnel](#) established in 2020
- SCT developed [FAST training materials](#), including the [FAST Quick Start Guide](#)
- SCT made updates to the [BIBCO Participants Manual](#) explicitly describing FAST as a valid subject system alongside LCSH
- In May 2022, the British Library announced its [decision](#) to switch our subject indexing standard from LCSH (Library of Congress Subject Headings) to FAST

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

Accomplishments related to 5.2

- Task Group on URIs in MARC issued document "[Formulating and Obtaining URIs](#)"

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

Accomplishments related to 5.3

- SCA charged Task Group on Enhancing Metadata and Practices in MARC Bibliographic Records ([preliminary report](#))

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

Accomplishments related to 5.4

- Created [URIs in MARC Pilot](#)

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

Accomplishments related to 5.5

- Created [PCC Sinopia Cataloging Affinity Group](#)

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

Accomplishments related to 5.6

- PCC data ingested into [Share-VDE](#) (where URIs are added)
- Task Group on URIs in MARC issued document "[Formulating and Obtaining URIs](#)"

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

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

Accomplishments related to 6.1

- Charged a PCC Task Group on Legal Status ([final report](#))

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

Accomplishments related to 6.2

- Sinopia pilot participants developed PCC profiles
- Charged Working Group on Metadata Application Profiles ([interim report](#))
- Charged Task Group to Implement Sinopia Expansion Recommendations ([final report](#))
- Charged Task Group on Required Contributions to the PCC ([Preliminary report](#))
- SCA released "[PCC Guidelines for Minimally Punctuated MARC Bibliographic Records](#)"
- Conducted a [feasibility study](#) for conventional collective titles
- Charged Task Group on Developing [Guidelines](#) for Using ISO 639-3 Language Codes for

- Library Cataloging
- Charged Task Group on MARC Simplification for BIBFRAME Conversion ([Final report](#))

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

Accomplishments related to 6.3

- Sustains ongoing partnerships with organizations that can seek grant funding, including [LD4P3](#) and OCLC

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

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

Accomplishments related to 7.1

- Created new [Advisory Committee on Diversity, Equity and Inclusion \(DEIAC\)](#)

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

Who: PCC

Timeline: Ongoing

Accomplishments related to 7.2

- Issued "[Report of the PCC Ad Hoc Task Group on Gender in Name Authority Records](#)"
- Released "[PCC Open Metadata Policy](#)"

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

Accomplishments related to 7.3

- DEIAC created "[Guiding Principles for Diversity, Equity, and Inclusion for Metadata Creation](#)"

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

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

Accomplishments related to 7.4

- Beginning in 2022, have issued open calls for task group and committee membership
- DEIAC conducted a survey in 2022

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

7.5.1. 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)

7.5.2. 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

Accomplishments relate to 7.5

- Two DEIAC members are participating in the [ALA EDI Assembly](#)
- Work is ongoing