STRATEGIC PLAN, 2002-2006, incorporating
Tactical Plan for 2002-2004
(Approved 4/11/03)
with PCC Tactical Objectives, 2004-2006
(as of December 21, 2004; updated April 12, 2005)

Mission Statement

In support of the need to provide access to information resources the Program will seek to cooperatively increase the timely availability of authoritative records created and maintained under accepted standards, to facilitate the cost-effective creation and use of these records, and to provide leadership in the national and international information community.

Goals

Goal 1: Database

Increase the timely availability of bibliographic and authority records by cataloging more resources, by producing authoritative cataloging that is widely available for sharing and use by others, and by cataloging in a cost effective manner.

1.1.   Increase the production of authoritative bibliographic and authority records, especially in under-represented subjects and languages.

1.1.1 Increase by 10% per year the current level of records contributed and maintained by BIBCO members.
Who: BIBCO members   When: 2002-2004

1.1.2 Increase by 5% per year the current level of CONSER contributions and maintenance.
Who: CONSER members   When: 2002-2004

1.1.3 Increase by 10% per year the current level of records contributed and maintained by NACO members.
Who: NACO members   When: 2002-2004

1.1.4 Increase by 5% per year the current level of records contributed and maintained to SACO.
Who: SACO contributors   When: 2002-2004

1.2 Encourage development and use of appropriate technologies to contribute to databases cooperatively.

1.2.1 Encourage ILS vendors to develop automated authority generators and the means for their real-time upload to utilities.
Who: Automation   When: 2002-2004

1.2.2 Streamline notification to LC of bibliographic file maintenance resulting from NACO heading changes.
Who: Automation, Steering Committee   When: 2002-2004

1.2.4 Implement work item 4.1 of the LC Action Plan for Bibliographic Control of Web Resources and continue to encourage vendors to provide high quality bibliographic records for titles in journal aggregations.
Who: Automation							When: 2002-2004

➔**1.2.5[1]** Assess with the publishing community possibilities for the flow of bibliographic data among library and publisher databases.
Who: CONSER Coordinator					When: April 2005

➔**1.2.6** Emphasize the development of automated means for record creation, enhancement, maintenance, and sharing—especially for digital resources.

1.3 Ensure the timely access to and widespread distribution of bibliographic, authority, and holding data.

1.3.1 Develop specifications for bibliographic and pattern notification services such that they could be implemented by bibliographic utilities, subscription agencies, consortia, or other service bureaus in a cost-effective manner, and effectively utilized by libraries.
Who: Automation							When: 2002-2004

➔**1.3.2** Publish a reference guide for machine-derived and machine-generated monographic records.
Who: Monographic Aggregator Task Force (Standing Committee on Automation)
When: Summer 2005

➔**1.3.3** Create and distribute a statement encouraging and offering assistance to information providers who offer useable cataloging records that correspond to the information resources they sell.
Who: Task Group on Encouraging Information Providers to Create Useable Bibliographic Records (Chair, Arno Kastner; Katharine Farrell; and Jane Ouderkirk)
When: January 1, 2006; distribute statement in brochure form at June 2006 ALA

1.4 Maximize the sharing of and use of bibliographic, authority, and holdings records from international sources.

1.4.1 Expand the availability for records from international sources.
Who: LC, OCLC, RLG, FMC					When: 2002-2004

1.4.2 Enhance records from international sources to increase their utility.
Who: PCC Members						When: 2002-2004

1.4.3 Explore training and standards obstacles that currently limit international PCC participation and consider strategies to overcome these barriers.
Who: Standards, Training, Secretariat			When: 2003

1.5 Maximize the sharing and use of patterns and holdings data.

1.5.1. Recommend long-term storage of pattern data based on results of CONSER survey.
Who: CONSER pattern initiative				When: 2003-2004

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[1] ➔ indicates one the eleven new PCC tactical objectives for 2004-2006, as determined at the PCC Policy Committee Meeting, November 4-5-2004

1.5.2. Explore the possibility of developing partnerships with subscription agents to enable maintenance of pattern data in OCLC records.
Who: CONSER pattern initiative   When: 2003

1.5.3. Work with OCLC on developing a notification service when patterns are added.
Who: CONSER pattern initiative   When: 2003

1.5.4. Explore the need for holdings and pattern data for electronic journals.
Who: CONSER pattern initiative   When: 2003

1.5.5. Explore the potential of a universal holdings record and its relation to FBRR, etc.
Who: CONSER pattern initiative   When: 2003-2004

1.6 **Increase the coverage of Program records in relation to the cataloging needs of libraries**.

1.6.1 Develop mechanisms for assessing the extent to which Program records cover the need for timely cataloging of new acquisitions, and for identifying areas of insufficient coverage.
Who: Assessment Task Group   When: 2003

Goal 2: Standards

Promote the development and use of nationally and internationally accepted standards, rules, and conventions to support wide use of records.

2.1 Establish practices and conventions that support cost-effective cataloging.

2.1.1 Update Core records standards, when needed, including development of a FAQ to facilitate interpretation.
Who: Standards   When: 2002-2004

➔**2.1.2** Collaborate with the Library of Congress to test the viability of different levels of bibliographic control for Web resources.
Who: David Reser (LC), chair; volunteer PCC institutions; one member each from Automation, Standards, and Training standing committees
WHEN: Presentation and dialog with PCC institutions (David Reser): May 2005
WHEN: Testing the use of the access level record (volunteer PCC institutions): May 2005
WHEN: Coordination and analysis of the PCC use of access level records (David Reser and one member each from Automation, Standards, and Training standing committees): post-May 2005

2.2 Work with other national and international groups responsible for cataloging related standards (e.g., MARC, ISSN, etc.) to encourage standards that support Program goals and objectives.

2.2.1 Monitor research and identify changes to cataloging codes and standards to promote Program goals.
Who: Standards   When: 2002-2004

2.2.2 Take an active role in the development of standards conducive to Program goals by monitoring activities of standards-setting groups, assessing the impact of proposed changes on Program goals and activities, and, when appropriate, recommending action

the PCC should take to support or oppose changes.
Who: Standards, Automation   When: 2002-2004

2.2.3 Promote changes to cataloging codes to align them more closely with user needs.
Who: Standards, Operations   When: 2002-2004

2.2.4 Monitor activities related to FRBR and serials/continuing resources and provide examples for continuing resources.
Who: CONSER TG on FRBR and Continuing Resources   When: 2002-2004

2.3 Provide timely and high quality documentation.

2.3.1 Maintain Program documentation.
Who: NACO/SACO/BIBCO/CONSER Coordinators, Standards, Training When: 2002-2004

2.3.1.1 Issue updates to CONSER Editing Guide and CONSER Cataloging Manual.
Who: CONSER Coordinator   When: 2002-2004

2.3.1.1.1 Issue new CCM module for rare serials.
Who: CONSER Coordinator   When: 2004

2.3.1.1.2 Revise CEG to accommodate changes to AACR2.
Who: CONSER Specialist   When: 2003

2.3.1.2 Refocus training material to emphasize the practical aspects of BIBCO record creation.
Who: SC Training, BIBCO Coordinator, BIBCO operations
When: 2002-2004

2.3.1.3 Prepare 3rd edition of the NACO Participants Manual.
Who: Training, Coop Team Members   When: 2005

2.3.1.4 Expand Web-based documentation.
Who: NACO/SACO/BIBCO/CONSER Coordinators, Standards, Training
When: 2002-2004

2.3.1.5   Prepare SACO Participants Manual.
Who: SACO Coordinator
When: November 2005

2.4 Develop mechanisms for evaluating standards and effectiveness of records to determine whether these are meeting Programs needs.

2.4.1 Monitor and evaluate changing standards for authority records, to be sure they align with Program needs and goals.
Who: NACO/SACO/BIBCO Coordinators, Standards, Training
When: 2002-2004

2.4.2 Evaluate PCC standards in changing environment to ensure alignment with needs and goals of Program, including possible development of new standards (e.g., aggregators, holdings, etc.).
Who: NACO/SACO/BIBCO/CONSER Coordinators, Standards, Training
When: 2002-2004

Goal 3: Leadership and Training

Provide leadership within the broad information community and promote the values of the Program for Cooperative Cataloging.

3.1 Conduct training Programs, workshops, and/or institutes aimed at expanding the pool of Program catalogers and developing cataloging skills that support the Program goals within the library community.

3.1.1 Provide continuing education Programs for the library community.
Who: Training, SCCTP, Operations   When: 2002-2004

3.1.2 Identify additional opportunities to educate library community.
Who: Training, SCCTP, Operations   When: 2002-2004

3.1.3 Provide training in managing PCC activities at the local level, covering in particular how to accommodate cooperative projects within existing workflows.
Who: Training, Operations   When: 2002-2004

3.1.4 Evaluate the effectiveness of PCC training Programs and trainers.
Who: Training, Operations   When: 2002-2004

➔**3.1.5** Develop two new training courses in partnership with ALCTS for the benefit of the entire cataloging community.
(1) Who: TF on series authorities training (Standing Committee on Training)
When: Prelim report by June 2005; pilot by June 2006; pre-con course, June 2007
and
(2) Who: TF on LC classification training (Standing Committee on Training)
When: Prelim report by January 2006

➔**3.1.6** Strengthen training and documentation support for the efforts of libraries to maintain NACO and BIBCO participation.
Who: TF comprised of Carolyn Sturtevant, BIBCO Coordinator (chair) and representatives
        from each of the following: SCT, BIBCO OpCo, PoCo, and a non-U.S. library
When: Preliminary report to PoCo by June 2005
When: Implementation, Spring 2006

3.2 Identify the need for, develop as necessary, and widely distribute easy-to-use training material in support of Program membership goals and values.

➔**3.2.1** Explore Web-based training
Who: Task Group on Online Training (Standing Committee on Training)
When: Analysis and strategy recommendations by September 2005; timeframe for prototype online course to be determined in consultation with SCT, PoCo, and TF members.

3.3 Pursue opportunities to provide public information and education campaign within the information community about the goals, values, and activities of the Program.

3.3.1 Increase public awareness through articles, public relations, speaking engagements.
Who: PoCo members, NACO/SACO/BIBCO/CONSER Coordinators, SC chairs

When: 2002-2004

3.3.1.1 Make presentations to library science and information Programs.
Who: PoCo members, NACO/SACO/BIBCO/CONSER Coordinators, SC chairs
When: 2002-2004

3.3.1.2 Increase PCC presence at specialized library organizations (e.g., special subject, area studies, etc.).
Who: PoCo members, NACO/SACO/BIBCO/CONSER Coordinators, SC chairs
When: 2002-2004

3.3.1.3 Issue press releases on PCC activities.
Who: Secretariat   When: 2002-2004

3.3.1.4 Publish achievements of PCC Programs.
Who: Secretariat   When: 2002-2004

➔**3.3.2** Commission the research and writing of an article to be published in a prominent library journal that would provide readers with the history of the PCC, its ongoing evolution, and its plans to remain a vital organization in the information community.
Who: Author to be determined by PoCo Steering Committee by ALA, June 2005
When: A contract to be issued not later than November 1, 2005, with the expectation that the article will be published during 2006.

➔**3.3.3** Undertake a redesign of the Program's Web presence with a view toward making the Web site the Program's primary vehicle for communication, marketing, and access to all PCC-related information.
Who: LC staff
When: Revamp of PCC Web site ready by BIBCO OpCo, May 2005
When: Solicit content comments from PCC membership, Summer 2005, with report to be made at PoCo, November 2005, with a view to implementing approved changes by November 2006.

3.4 Partner with information providers and other agencies to promote and assess the utility of PCC records to end users.

3.4.1 Develop methodology to evaluate end-user satisfaction with catalog records and for research into needs as related to; (1) PCC Programs; and (2) the catalog in general in order to validate/modify elements of PCC Programs.
Who: Task Group on End-Users Needs   When: 2003-2004

3.4.2 Conduct research into information seeking behavior that can be applied to catalog use and catalog records.
Who: Steering Committee (to appoint PI)   When: 2003

3.5 Contribute to the identification and resolution of emerging issues related to bibliographic access.

3.5.1 Collaborate with ALCTS in providing continuing education to library professionals, enabling them to participate actively in metadata initiatives inside and outside the traditional library (LC Action Plan, Work item 5.3).
Who: Training   When: 2002-2004

3.5.2 Promote cross-sectoral discussions and partnerships (e.g., archivists, libraries, educational museums, other information providers) to promote development and use of metadata content standards.
Who: Standards   When: 2002-2004

3.6 Encourage vendors to develop cost-effective mechanisms to support the creation, use, and enhancement of Program data.

3.6.1 Contact ILS vendors to encourage development of automated tools for enhancing bibliographic access (e.g., TOC etc. or interoperability with other information sources).
Who: Automation, Operations   When: 2002-2004

3.6.2 Contact ILS vendors to encourage research to facilitate use and usefulness of records in a global context (e.g., multilingual mapping of subject headings).
Who: Automation, Operations   When: 2002-2004

3.6.3 Work with ILS vendors to develop pattern loaders and improve compatibility with MFHD.
Who: CONSER Pattern Task Group   When: 2002-2004

3.6.4 Contact ILS vendors to seek development of automated tools for classification and cuttering.
Who: Automation   When: 2002-2004

3.6.5 Contact ILS vendors to encourage compliance with levels 1,2,3 and/or 4 of the series heading normalization algorithms identified in the Final Report of the Task Group on Series Numbering.
Who: Automation   When: 2003

Goal 4: Membership

Expand membership through managed growth and encourage active participation.

4.1 Develop diverse membership to ensure broad-based resource coverage.

4.1.1 Contact specialized groups for new funnel projects.
Who: NACO/SACO/BIBCO/CONSER Coordinators   When: 2002-2004

4.1.2 Work with existing members to expand to new specialties.
Who: NACO/SACO/BIBCO/CONSER Coordinators   When: 2002-2004

4.1.3 Facilitate greater international participation in authority file contribution.
Who: NACO/SACO Coordinators   When: 2002-2004

4.1.4 Expand CONSER Enhance.
Who: CONSER Coordinator   When: 2002-2004

4.1.4.1 Develop USNP Enhance category and other methods for updating newspaper records.
Who: CONSER Coordinator   When: 2003-2004

4.2 Ensure that Participants continue to meet established contribution

expectations (scope, quantity, and quality).

4.2.1 Perform review process to assure quantity and quality of PCC records.
Who: NACO/SACO/BIBCO/CONSER Coordinators   When: 2002-2004

4.2.2 Examine membership structure for CONSER.
Who: CONSER Coordinator, CONSER Membership Task Force
When: 2003-2004

4.2.3 Develop programmatic requirements for SACO membership.
Who: Task Group on SACO Programmatic Development   When: 2003

4.2.4 Review how members' status is monitored and re-certified.
Who: Steering Committee   When: 2003

4.2.4.1 Clarify expectations and responsibilities of membership.
Who: Steering Committee   When: 2003

4.3 Recruit new members and encourage existing members to contribute records in under-represented areas.

4.3.1 Identify target areas to be defined as "under-represented".
Who: Assessment Task Group   When: 2003

4.3.2 Develop strategy for recruiting new members and encouraging existing members to contribute records in the target areas.
Who: Steering Committee   When: 2003-2004

4.4 Provide start-up and ongoing training to support members.

4.4.1 Assess need for new training initiatives for participants.
Who: Training, NACO/SACO/BIBCO/CONSER Coordinators
When: 2002-2004

4.4.2 Identify the need for remedial training and follow-up as necessary to improve performance.
Who: Training, NACO/SACO/BIBCO/CONSER Coordinators
When: 2002-2004

4.5 Foster development of leadership within the library community by encouraging and providing opportunities for active participation in the Program.

4.5.1 Convene PCC Participants, CONSER-At-Large, and BIBCO-At-Large meetings in conjunction with ALA Midwinter Meetings and Annual Conferences.
Who: Secretariat, NACO/SACO/BIBCO/CONSER Coordinators
When: 2002-2004

4.5.2 Draw upon membership to form task groups when needed to accomplish Program activities or perform special tasks.
Who: Steering Committee, Standing Committees, Operations
When: 2002-2004

4.5.3 Explore and review ways in which members and non-members can contribute to the

Program other than by creating and maintaining records; e.g., developing training materials and conducting training; conducting research and assessment studies; developing "white papers" on cataloging-related issues.
Who: Standing Committees; Operations Committees
When: 2002-2004

4.5.4 Consider alternatives to membership to gain access to high quality bibliographic records, holdings data, and other metadata created or maintained by non-Program members.
Who: Standing Committees; Operations Committees
When: 2002-2004

➔**4.5.5** Design and implement a plan to develop participation and leadership among policy-level representatives of PCC participating institutions.
Who: PCC Task Force to Develop High Level Leadership (Chair, Joan Swanekamp; Roxanne Sellberg, Judi Nadler)
When: November 1, 2005

4.6 Assess costs and benefits of membership.

4.6.1 Appoint Task Group to determine parameters for a membership cost-benefit study.
Who: Steering Committee   When: 2003

4.6.2 Implement membership cost-benefit study as recommended by Task Force
Who: Secretariat   When: 2003-2004

4.6.3 Perform a BIBCO cost-benefit analysis to parallel that done for NACO.
Who: BIBCO Coordinator   When: 2003

4.7 Minimize barriers to participation in the PCC Program.

4.7.1 Appoint Task Force to identify barriers to PCC participation.
Who: Steering Committee When: 2003

4.7.2 Recommend for PoCo approval appropriate measures to reduce identified barriers.
Who: Steering Committee When: 2003

Goal 5: Governance and Operations

Operate in a cooperative manner with an effective and efficient governance and management structure.

5.1 Conduct a regular planning process to facilitate goal setting and Program development.

5.1.1 Monitor Strategic Plan and update Tactical Plan.
Who: PoCo   When: 2002-2004

5.2 Regularly review the operational procedures associated with participation to ensure cost-effectiveness.

5.2.1 Collect and present data to Steering Committee.
Who: NACO/SACO/BIBCO/CONSER Coordinators

When: 2002-2004

5.2.2 Determine measures to improve operational procedures.
Who: Secretariat, Steering Committee   When: 2002-2004

5.3 Review funding needs, develop budget, and secure funding of/for the Program.

5.3.1 Annually develop budget covering following year for approval at ALA Midwinter Meeting.
Who: Steering Committee   When: 2002-2004

5.4 Design and implement mechanisms for effective communication among the membership.

5.4.1 Create and maintain discussion lists in support of Program committees and task forces.
Who: NACO/SACO/BIBCO/CONSER Coordinators
When: 2002-2004

5.4.2 Publish internal and external quarterly and annual reports.
Who: Secretariat   When: 2002-2004

5.4.3 Issue CONSERline.
Who: CONSER Coordinator   When: 2002-2004

5.4.4 Contribute articles to LCCN.
NACO/SACO/BIBCO/CONSER Coordinators   When: 2002-2004

5.5 Maintain effectiveness of organization and governance of Program.

5.5.1 Recommend changes to improve organization and governance of Program.
Who: Secretariat, Steering Committee   When: 2002-2004

March 15, 2005
April 12, 2005/rev.
April 25, 2005/rev.