CONSER Publication Pattern Initiative
Strategic Plan and Milestones
(Rev. June 2004)

Mission

The mission of the CONSER Publication Pattern Initiative is:

> to enable the cooperative creation, sharing, and distribution of pattern and holdings data via the CONSER database and among local systems, and:

> to promote full use of the MARC 21 Format for Holdings Data(MFHD) by library systems.

The CONSER Task Force on Publication Patterns and Holdings will oversee the initiative and carry out the tasks listed below.

Task 1: Database

Build a database of authoritative patterns housed in the CONSER database or associated with CONSER records and maintain patterns as changes occur.

Who: Pattern participants

Milestones:

Spring 2000	19 participants signed up to participate
	CONSERHOLD discussion list set up to facilitate Q&A and exchange of information
June 2000	First publication pattern added
January 2001	Over 300 patterns added
February 2001	Harvard pattern data added to over 40,000 records
June 2001	Goal of inputting 1000 patterns exceeded
Dec. 2001	Functionality statement prepared by Hillmann and Rappaport for use by OCLC
April 2002	Survey of pilot participants and CONSER non-participants completed relative to success and future directions for the initiative

June 2002   2-year pilot successfully completed; decision made to
                   continue as an ongoing effort

June 2003   Final report of task group to explore developing partnerships
                   with subscription agents and maintenance of pattern data in
                   OCLC records completed

Further goals:

a. Continue to recruit new participants

Who: CONSER Coordinator, Chair, participants
When: Ongoing

b. Recommend long term storage of pattern data based on results of CONSER
survey and further study

Who: Linda Miller (chair), Amira Aaron, Ted Fons, Cathy Kellum, Jian Wang, Bob
Allan, John Levy, Ed Glazier, Les Hawkins

c. Consider further dataloads (see Task 5)

        c.1. Explore load from Aleph
        Who: Gbala, Greene, others

        c.2. Explore loads from VTLS libraries (e.g., Library of Virginia)
        Who: Espley, CONSER Coordinator

d. Explore the potential of a universal holdings record and its relation to FRBR,
impact on union listing, local vs. shared data, summary vs. itemized holdings,
and union listing.

Who: Diane Hillmann (chair), Cathy Kellum, Frieda Rosenberg, Rebecca
Guenther, Sharon Wiles-Young, Margi Mann, Cecilia Boone, Ed Glazier
When:

e. Work with OCLC on developing a notification service when patterns are added

Who: Rich Greene, others
When: 2003

Task 2: Mentoring and workflow

To introduce new members into the program and to periodically review issues related to workflow in various types of libraries and for various types of resources.

Who: Lucy Barron, Beth Jedlicka, Helen Gbala, James Castrataro, Julie Su, Jeanne Baker, Jian Wang, Wen-ying Lu (lead)

Milestones:

July 2002:   Workflow template, flowcharts, and FAQ completed and mounted on CONSER Web site

Fall 2002:   Guidelines for mentoring new members developed

June 2003   Survey of need for holdings and patterns data related to electronic journals completed

Task 3: MFHD, vendors, technical issues

Who: Linda Miller (lead), vendor liaisons and institutions working with them

Milestones:

June 2000   VTLS announces that it can upload pattern from CONSER record to Virtua

                 MARBI approves proposal for subfield $z to accommodate roman numerals and other schemes

July 2000   Vendor survey completed by 11 ILS systems of 13 requested

Fall 2000   System vendor requests help from Hillmann to assure that system is MFHD- compatible

Spring 2001   III develops loader for patterns

Fall 2001   Statement of what it means to be compliant with MFHD completed by Hillmann and Rappaport

June 2002   Further MARBI proposals presented Vendor/institutional relationships established to work on improving MFHD accommodation and loaders

Further goals:

a. Work with vendors to improve MFHD compliance and develop capability for upload and download of patterns

> Who: Endeavor/Library of Congress
> Sirsi/Pennsylvania State
> Ex Libris/MIT and Maryland
> III/Michigan State

> When: Ongoing

b. Actively participate in vendor user groups meetings and find other ways (such as site visits) to impress on vendors the importance of compliance with MFHD.

> When: Ongoing

> Who: All

c. Work with e-resource standards groups to ensure compliance with MARC21 for holdings format

Task 4: Documentation and Training

Provide needed documentation and training related to the creation of publication pattern and holdings data.

Who: CONSER Coordinator (lead), Frieda Rosenberg, Mary Ann Van Cura, Ruth Haas

Milestones:

Fall 1999	FAQ completed by Van Cura and Hirons and added to CONSER Web site providing details of the initiative and its goals
	Winter 2000 Guidelines for participation completed by Rosenberg and Hillmann and added to Web site
January 2001	SCCTP Serials Holdings Workshop completed and 29 trainers trained

Further goals:

a. Continue to revise documentation to accommodate changes to the format and to present problems and resolutions from discussion list. **Abbreviations for Captions – Appendix A of the Guidelines for input of caption data- do we need a person or group to oversee this on an ongoing basis? Need to provide for the addition of new data from various institutions/sources.**

When: Ongoing
Who:

b. Provide ongoing forums for participants to discuss patterns, workflow, etc.

      b.1. Explore new ALA interest group
      b.2. Hold networking nodes at NASIG

c. Provide documentation in PDF format rather than just html

Who: LC (Hawkins)
When: Winter 2003

Task 5: Roles of utilities and subscription vendors

Support the initiative and explore further means of participation.

Who: Rich Greene, Ed Glazier, Jennifer O'Connell

Milestones:

Spring 2000	OCLC announces availability of field 891
Fall 2000	Robert Bremer (OCLC) develops macro to enable pattern creation from bibliographic record
February 2001	OCLC loads Harvard pattern/holdings data to 40,000 CONSER records

Further goals:

a. Assure availability of macro under OCLC's new system

      Who: Bremer

When: 2002-2003

b. Work with OCLC to develop mechanisms for batch upload/download of patterns.

Who: Rich Greene
When:
See also task 1 e. and f.

Task 6: Publicize the initiative

Who: All Task Force members

Milestones:

May 2000   Workshop at NASIG CONSER initiative (Hirons, Rosenberg, Haas)

May 2001   Workshop at NASIG on Michigan State's use of III loader (Lu) Presentation and demonstration at CONSER Operations meeting

June 2001   Participation in LITA Preconference Publication of article in OCLC newsletter on the CONSER Initiative

June 2002   Discussion at Big Heads on importance of the initiative NASIG network node discussion well attended

Spring 2003 PowerPoint presentation giving an overview of the Initiative was developed

Further goals:

a. Write articles for CONSERLINE

Who: Chair, Coordinator, others
When: Ongoing

b. Explore other means for publicizing the initiative with administrators

Who: Chair, Coordinator

c. Write articles for journals and newsletters

Possibilities:

ILL/reference-related publication (Su)
LAMA journal (article for administrators)
Articles in PLA and acquisitions journal
LCCN (Hawkins)
IFLA Serials Section Newsletter

d. Give presentations at NASIG, ALA, AALL, etc. demonstrating the benefits of the program, the use of patterns by participants and vendors, and the potential future uses of patterns.

Who: All
When: Ongoing