RDA Developments of Note

Presented to CC:DA
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Establishing NARDAC

North American RDA Committee

CALENDAR

Working backwards…

- NARDAC must be fully in place by 2019
- Need near-final structure no later than mid-2018
  - Will not happen before April 2018 RDA Toolkit Update
  - Allows for test and adjust period before full NARDAC implementation
- Basic outline of structure, membership, working principles, etc. need to be developed (and generally agreed upon) in 2017

REQUIREMENTS FROM RDA BOARD

- Represent countries/organizations in the region who have implemented RDA
  - NARDAC doesn't have to be legal entity but needs terms of reference or a constitution
- Serve as conduit between regional RDA users and RSC regarding RDA development
- Identify RSC representative and backup
  - Must serve for a minimum of 2 years
- Develop and provide feedback on proposals
- Foster development of supporting structures
- Support RSC working groups – suggest members

CURRENT ASSUMPTIONS

- Members will represent the three current organizations: ALA, CCC, LC
  - Each organization will identify their own representatives, determine term limits, etc.
- Decision-making
  - Will need to accommodate split recommendations – unanimity not required
- NARDAC members will
  - Select their own RSC Representative
  - Be responsive to their communities, keep lines of communication open, etc.
- Working principles need to be developed

ISSUES UNDER DISCUSSION

- Representation / membership
  - Possibility of having 2 representatives each from ALA, CCC, and LC
  - Possible slots for 1 or 2 co-opted members to address areas where particular expertise is needed
- How closely should the North American structure model others?
  - Review European model, while recognizing that their needs and structures are different from ours
  - Monitor the structure developing for Oceania (ORDAC)

NARDAC-Related Opportunities for CC:DA

- As part of the 3R Project
  - Form an unofficial North American working group to take on a 3R Project assignment?
    - A follow-up joint project based on the success of the ALA/CCC partnership last year
    - Along with the task could also test: Communication procedures, tools, liaison work, protocols, etc.
- Related to RSC meeting this spring
  - Day-long RSC sponsored event to discuss NARDAC, IFLA LRM, 3R Project, etc.
  - To be held in Chicago on May 16

Glossary Changes
Aug. & Oct. 2016

RELATIONSHIP DESIGNATORS

- Deconstructed definitions into
  - General definition
  - Scope note
    - Includes examples, inclusions/exclusions, restrictions
    - See references removed
- Identified which definitions include instructions
  - Will address as part of 3R Project
- Replaced secondary definitions, e.g.
  - "… a halogen (chlorine, bromine, iodine, or fluorine)…"
    → "… chlorine, bromine, iodine, or fluorine…"
- Limited punctuation to period, comma, semi-colon & colon

RDA Changes
Feb. & Apr. 2017

Beyond Proposals Approved in Frankfurt

Replacing "Resource"

- Where possible in RDA element definitions, labels and Toolkit instructions, the term "resource" will be replaced with the specific entity term
  - Addresses current ambiguities
    - Sometimes just one of the WEMI entities is meant, other times it's more
  - An early step in accommodating LRM
    - LRM implies that greater precision is required
  - The term "entity" will be used to refer to any RDA entity (not just WEMI)
  - Changes mostly limited to the use of "resource" alone; review of additional terms will be part of 3R Project

Introducing / Clarifying "Agent"

- Replacing "person, family, or corporate body" with "agent"
- Replacing "person, family, and corporate body" with "agents"
- Changing "agency or agent" to "agency"
  - Used in some instructions for legal works

- Introduction of "collective agent" will come during 3R Project

USE OF DEFINITE/INDEFINITE ARTICLES

- Current practices
  - Use indefinite article in new RDA elements and relationship designators
  - Omit articles from the preferred label of new RDA elements and relationship designators
- Will remove articles from RDA element labels
  - Will serve as basic design for 3R Project
- Within instructions, will normally use the indefinite article
  - But use definite article to distinguish between the element in focus from another instance of that element

Removing "in this order" from AAP Instructions

- In Frankfurt, RSC agreed to remove "in this order" from several AAP instructions while keeping the a), b), etc. labels
  - Still an implied order

    Construct the authorized access point representing the work by combining (in this order):

    a) the authorized access point for an agent responsible for the work (see 6.27.1.2-6.27.1.8), if appropriate

    b) the preferred title for the work (see 6.2.2).

- Later agreed to extend this to all AAP instructions
  - Considered a powerful signal to non-Anglo American communities – offers flexibility
  - No change in North American practice expected
- Will be reviewed again as part of the 3R Project and the impact of implementing Nomen

Other Editorial Changes

- Working on replacing "and/or" with just "or"
  - language and/or script → *language or script*
  - identification and/or function → *identification or function*
- Replacing Table 3.1 (Media Type) and Table 6.1 (Carrier Type) with a list of terms
  - Needed consistent approach with vocabulary terms; definitions will reside in Glossary
  - Interim decision; end-user experience may change as result of 3R Project

- *Note:* The group reviewing all of these proposed changes is now "RSC+" – includes WG chairs

RDA Toolkit Restructure and Redesign (3R) Project

To be completed by April 2018

3R Project – Why Now?

- Growing dissatisfaction with RDA Toolkit
    - Design is about 10 years old
    - Inflexible displays
    - Difficult to find information about changes made
    - Placeholder instructions instead of actual deletions
- Need structure in place to accommodate changes arising from IFLA LRM
- Growing number of translations
    - Need to find better ways to keep them current

3R Project – What is it?

- Data restructure
  - Create entity-based structure
  - Identify patterns that can be generalized, along with redundant content to be deleted
  - Develop relationship designator matrix
- Website redesign
  - Improve work processes
  - Enhance user experience
    - Advisory group collecting user stories
- Improve translation tools and processes
  - Allow for easier exchange of RDA information
  - Expand international involvement and input

3R Project – LRM Entities

- Add
  - Collective agent
  - Nomen
  - Place
  - Time-span
- Refine
  - Work
  - Expression
  - Manifestation
  - Person
  - etc.

3R Project – Content Changes Beyond LRM

- Address long-standing problems
  - Completely remove guidance that says: "This instruction has been deleted as a revision to RDA."
  - Implement the 4-fold path throughout RDA: four ways to capture data
    - Unstructured description
    - Structured description (includes authorized access points)
    - Identifiers
    - URIs
  - Clarify the "transcribe" vs. "record" instructions
  - Further develop guidelines for recording pagination and foliation

3R Project – Content Changes Beyond LRM

- Rethink presentation of instructions, etc.
  - Generalize where possible
  - Restructure layout
    - Create general guidance chapters followed by entity-based chapters
- Develop a new approach to relationship designators
  - Provide multiple labels for encoding, identification, and display
  - Possibly incorporate new terms at the same time
- Complete vocabulary substitution projects (resource, agent, etc.)

3R Project – Content Changes Beyond LRM

- Implement solutions to problems identified through Jane-athons, online forums, and deferred JSC/RSC proposals

- Build a concordance of current instruction numbers which will map to their new locations

- The result will **_NOT_** be RDA 2.0
  - Rather, a new *Expression* of RDA

3R PROJECT – FREEZING RDA CONTENT

- No changes to English RDA Toolkit text between April 2017 and April 2018
  - Need a stable text as the transformation takes place
    - Helps the various translations become current with the base text
  - No formal proposals considered in 2017
    - One last chance for fast track changes in April Update
    - Identified problems and possible solutions can be documented for submission in 2018
  - Some opportunities for community participation and feedback
    - Will turn to RSC working groups and other experts for help
    - Feedback loop will be initiated by RSC, rather than by RDA users

3R Project - Steps

1) Scoping study of current text – in progress by RSC Chair & RSC Secretaries
   - Identify patterns to improve flexibility for Toolkit displays
     - See where instructions can be generalized
   - Standardize ways to refer to specific elements/entities
   - Identify tasks for working groups in next phase
2) Open up participation to RSC+
   - Develop content, build new structure
   - Make tentative decisions
3) May RSC meeting
   - Review progress and set tasks
4) Fall RSC meeting
   - Make final decisions

THE 4-FOLD PATH

4-Fold Path

- Options for recording relationships between entities
  - Unstructured description
    - A string, such as a free text note
  - Structured description
    - String values from other elements put in a particular order
      - Access point
  - Identifier
    - (Alpha-)numeric string designed for human consumption
      - Does not include the label/source: [ISBN] 978-0-8389-1328-4
  - URI
    - Identifies a specific instance of a thing; machine-actionable
    - **_Not_** an identifier for the thing

4-Fold Path: Implementation

- Will make available to every RDA element by default
  - Provide general guidance and instructions
    - Clarify when an element can only use a subset of the paths
      - Transcribed elements: unstructured; only applicable to manifestations
      - Identifier elements: only can have identifiers
- Different paths for different applications
  - More flexibility in instructions
  - URI only works with linked data
- Examples will expand to illustrate all paths
  - Will become obvious that examples aren't prescriptive

Transcription vs. Recording

- Transcribed data only accommodated by unstructured description
  - Unmediated transcription
    - Captured by machine processes
    - Human transcription without further manipulation
  - Mediated transcription
    - Default for legacy data
    - Includes normalizing spaces, capitalizations
- All paths accommodate recording data

QUESTIONS??