


Slide 1



RDA and FRBR:

Next Big Things in Cataloging

**Massachusetts Library Association
Technical Services Section
May 4, 2007
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Thank you for inviting me to be with you today. I just recently came back from the JSC meetings in Ottawa (April 16-20 and the meetings in London for RDA with representatives from the Dublin Core, IEEE/LOM, and World Wide Web Consortium, (W3C) Semantic Web communities – also included W3C Semantic Web and SKOS folks, so I'm very glad to share with you the latest news – hot off the presses as it were!

Handouts

A presentation slide with a light gray background and a thin black border. In the top left corner, the letters 'RDA' are displayed in a stylized font where each letter is inside a colored square: 'R' in a dark blue square, 'D' in a green square, and 'A' in a dark blue square. To the right of this logo, the text 'Topics today' is written in a blue, sans-serif font. Below the logo and title, a horizontal blue line separates the header from the main content. The main content consists of four bullet points, each marked with a small red square. The bullet points are: 'What is FRBR?', 'What is RDA and why a new standard?', 'RDA goals, structure, and content', and 'Preparing for RDA'. In the bottom right corner of the slide, the number '2' is visible.

RDA Topics today

- What is *FRBR*?
- What is *RDA* and why a new standard?
- *RDA* goals, structure, and content
- Preparing for *RDA*

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I was asked to talk about RDA – Resource Description and Access and also the FRBR – Functional Requirements for Bibliographic Records model that provides a foundation for the concepts in RDA. So, here are the topics for this morning. [read slide]

As we prepare for RDA there are some international developments that are shaping the future and that have influenced RDA itself. One of the principal ones is FRBR – Functional Requirements for Bibliographic Records.



What is *FRBR*?




- IFLA's Functional Requirements for Bibliographic Records (*FRBR*)
- User tasks
 - Find
 - Identify
 - Select
 - Obtain
- Conceptual model
 - Entities, Relationships, Attributes
- Mandatory elements for a national level bibliographic record

You have a handout on “What is FRBR?” to give you a bit more information. I will only be able to very quickly cover FRBR today. How many of you are already familiar with FRBR – already have a good idea of what it is?

IFLA – the International Federation of Library Associations and Institutions has been the center for global bibliographic standards for decades.

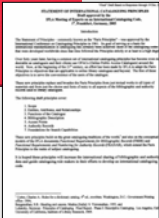

The IFLA conceptual model, Functional Requirements for Bibliographic Records, or FRBR, reinforces the objectives of catalogs and the importance of relationships to help users to fulfill basic tasks with respect to the catalog – enabling them to find, identify, select, and obtain information they want. These are the FRBR ‘User tasks.’

FRBR also offers us a structure to meet those basic user tasks. It includes an entity-relationship model, which is a conceptual model of how the bibliographic universe works – identifying its entities and relationships. It provides ways to collocate records at the level of works and expressions, to show relationships. It also includes the functional requirements, that is, the set of data elements or attributes that are mandatory for a national level bibliographic record.



Other International Developments



- Conceptual models
 - FRBR
 - FRAD for authority data
 - FRSAR
- Updating the Paris Principles (IME ICC)
 - IFLA Meeting of Experts on an International Cataloguing Code



And now there is a companion data model for authorities: FRAD – Functional Requirements for Authority Data. It was just sent out for worldwide review April 12th and you can find it on the IFLANET web site.

Besides FRBR and FRAD, IFLA has also produced a draft statement of international cataloguing principles to update the 1961 Paris Principles – this new set of principles is being vetted by cataloguing rule makers worldwide through the IFLA Meetings of Experts on an International Cataloguing Code, known as IME ICC. All of these international developments are taken into account by the Joint Steering Committee for Development of RDA as we are looking towards the future in developing RDA.

Before I get into talking more about RDA, let me take a moment to go back to FRBR to provide at least a little more explanation of what it is and how it affects RDA. FRBR was the result of several years of work by the IFLA Study Group on Functional Requirements for Bibliographic Records – I was a consultant to that group along with Tom Delsey and Elaine Svenonius. Our report was published in 1998 and introduced some new vocabulary.



Vocabulary



- “Book”
 - Door prop
(item)
 - “publication”
at bookstore
any copy
(manifestation)

Vocabulary is really very important in times of change and across communities that might use RDA – including system designers.

For FRBR, terminology was carefully selected to be more clear than our current English language. Let me give you an analogy from Patrick LeBoeuf (formerly chair of the FRBR Review Group for IFLA) – using the English word for “book” as we look at FRBR’s Group 1 entities.

When we say ‘book,’ what we have in mind may be a distinct, physical object that consists of paper and a binding and can sometimes serve to prop open a door or hold up a table leg – FRBR calls this an item.

When we say ‘book’ we also may mean “publication” as when we go to a bookstore to ask for a book identified by an ISBN – the particular copy does not usually matter to us, provided it belongs to the general class of copies we require and no pages are missing- any of the copies with the same content and in the same format will do – FRBR calls this manifestation.



Vocabulary

- "Book"
 - Who translated?
(expression)
 - Who wrote?
(work)

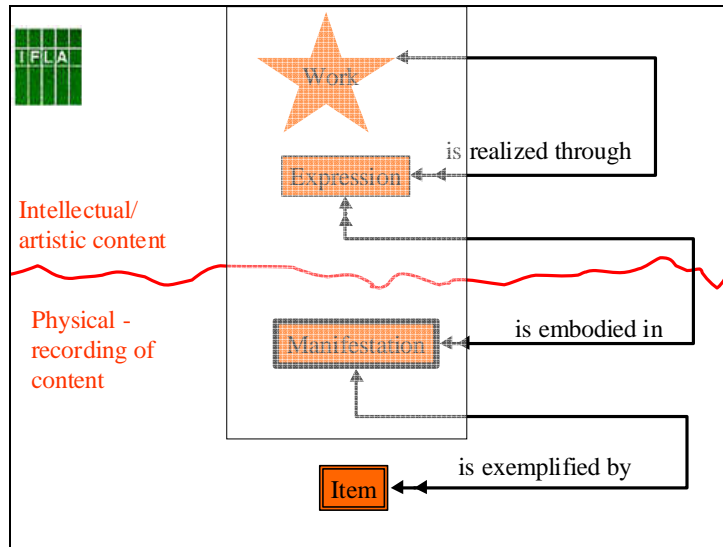
*When we say 'book' we could use the word as in "who translated that book?" – we may have a specific text in mind in a specific language or a translation – FRBR calls this expression.

*When we say 'book' as in "who wrote that book?" - we could also mean a higher level of abstraction, the conceptual (intellectual or artistic) content that underlies all of the linguistic versions, the basic story being told in the book, the ideas in a person's head for a book – FRBR calls this work.

When you hold a book in your hand – it's all 4 of those entities – an example of a manifestation (which is what we catalog and describe - to be re-used by other libraries or anyone anywhere and it embodies a particular expression of a work.

We want our language to be more precise to help with future system design and future cataloging rules. On Monday and Tuesday this week the RDA Outreach Group organized a meeting with representatives from several metadata communities – mostly Dublin Core, and also IEEE/LOM, Semantic Web, W3C, and SKOS. Handout with vocabulary recommendations


Slide 7



In the FRBR entity-relationships model, we have works and expressions – abstract entities of intellectual and artistic content. They are useful to identify in our bibliographic records, because we can use them to collocate or cluster together the things we collect and organize in libraries or display in our catalogs.

When we **record** the intellectual or artistic content, we move from the abstract “work/expression” to a physical entity. As FRBR puts it, a *manifestation* is the physical embodiment of an expression of a work. In order to record something you have to put it **on** or **in** some container or carrier. So, manifestations appear in various “carriers,” such as books, periodicals, maps, sound recordings, films, CD-ROMs, DVDs, multimedia games, Web pages, etc. A manifestation represents all the physical objects that bear the same characteristics of intellectual content and physical form. {click} In actuality, a manifestation is itself an abstract entity, but describes and represents physical entities, that is all the items that have the same content and carrier. When we create a bibliographic record, it typically represents a manifestation – that is, it can serve to represent any copy of that manifestation held in any library anywhere.

One example or exemplar of a manifestation is called an *item*. Usually it is a single object, but sometimes it consists of more than one physical object, e.g., a monograph issued in 2 separately bound volumes or a sound recording on 3 separate CD’s. With an item entity, we are able to identify an individual copy of a manifestation and to describe its unique attributes - this may be information relevant to its circulation or preservation. Work, Exp, Man, It = Group 1 entities.



Relationships Inherent to the Group 1 Entities

- **Work** *“is realized by” an expression*
- **Expression** *“is embodied in” a manifestation*
 - **Manifestation** *“is exemplified by” an item*
 - **Item**

Let's now move on to relationships for the Group 1 entities. Relationships are naturally a big part of the FRBR entity-relationship model.

There are also several types of relationships that we can consider.

Within FRBR there are relationships that are inherent among the entities : A work “is realized by” by an expression – that’s a relationship,

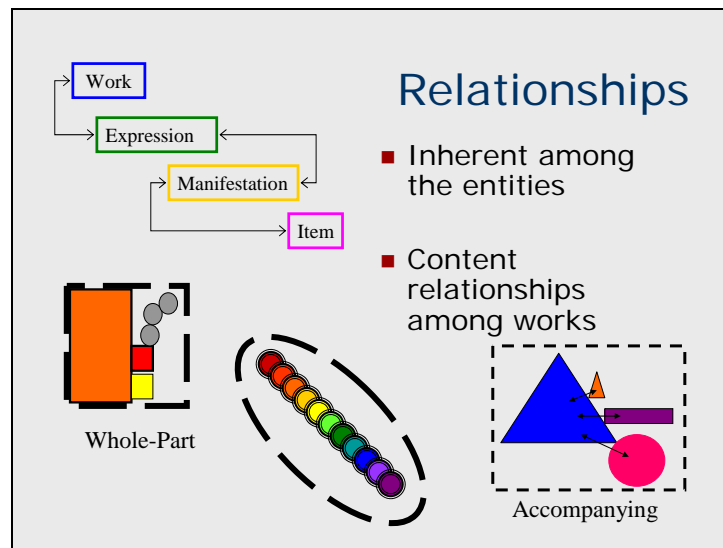
and an expression “is embodied in” a manifestation – that’s a relationship.

A manifestation “is exemplified by” an item – that’s a relationship.

But how do we know about these relationships? We rely on information that we pick up from examining an item.

Sometimes that item will self-describe which work it contains.

A characteristic of a work (like its subject or what it is about or its name or the name of its creator) is carried to all the entities below it in the hierarchy. This is important because we could associate certain descriptors at the work level that then could apply to all records for the associated manifestations... more about this when we look at scenarios.

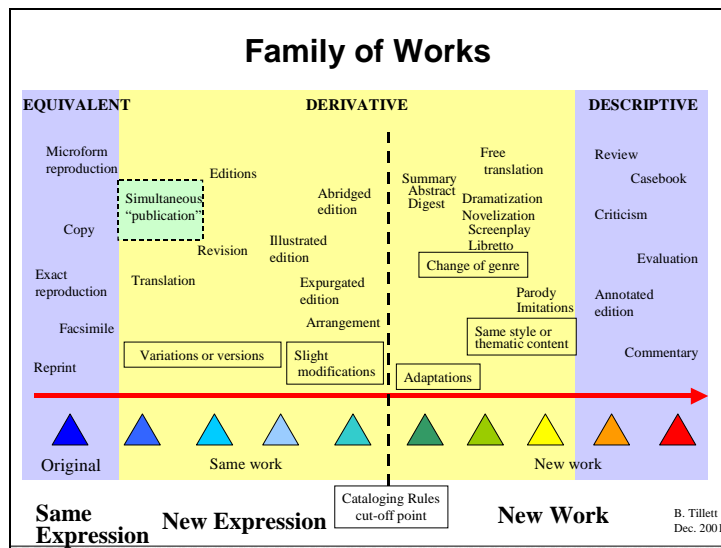


So, there are inherent relationships among the entities, like saying “a work is realized through an expression or “an expression is embodied in a manifestation”.

Another way to look at this is through the **content relationships** among works, that are then inherited by their expressions, manifestations, and items. Many years ago I suggested a taxonomy of relationships: equivalence, derivative, descriptive, whole/part, and part-to-part (sequential and accompanying), and shared characteristics relationships. These content relationships and inherent relationships will be covered in RDA in chapter 7.

Some of these relationships are described in FRBR, such as equivalent, derivative, and descriptive relationships of the content. There are also whole-part relationships with aggregates and their components.

Any of these content relationships that are identified at the work level are also inherited by the hierarchically related expressions, manifestations, and items.




This picture is from my latest update of the taxonomy of bibliographic relationships that was published by Kluwer¹ in 2001 (and in the "What is FRBR?" brochure). It shows a continuum of the relationships within a family of works as represented in manifestations moving from left to right. On the left are those that are equivalent, that are from the same expression of the work. Once we introduce a change to the content, like a translation, we have a new expression of the same work and further changes move us to the right, farther away from the original. (This will be reflected in ch. 7 of RDA.)

Once that derivation crosses the magic line of becoming more of the work of another person or corporate body, we consider it a new work, but it is part of the family of related works, even when the work moves on to be only describing a work in the family at the right end of this continuum. The entities in descriptive relationships at the right side of this picture, can even be considered to be in subject relationships in FRBR terminology and the conceptual model. The ability to inform the user of these related works ties back to the collocating and finding functions of a catalog again. The FRBR model reminds us of these important relationships that we should reflect in our catalogs for our users.

¹ In: *Relationships in the Organization of Knowledge*. – Carol Bean and Rebecca Green, eds. – Kluwer, 2001 (ISBN: 07923-68134)

Group 1 Entities' Attributes

<ul style="list-style-type: none"> ■ Work <ul style="list-style-type: none"> ■ ID ■ Title ■ Date ■ etc. ■ Expression <ul style="list-style-type: none"> ■ ID ■ Title ■ Form ■ Date ■ Language ■ etc. 	<ul style="list-style-type: none"> ■ Manifestation <ul style="list-style-type: none"> ■ ID ■ Title ■ Statement of responsibility ■ Edition ■ Imprint (place, publisher, date) ■ Form/extent of carrier ■ Terms of availability ■ Mode of access ■ etc. ■ Item <ul style="list-style-type: none"> ■ ID ■ Provenance ■ Location ■ etc.
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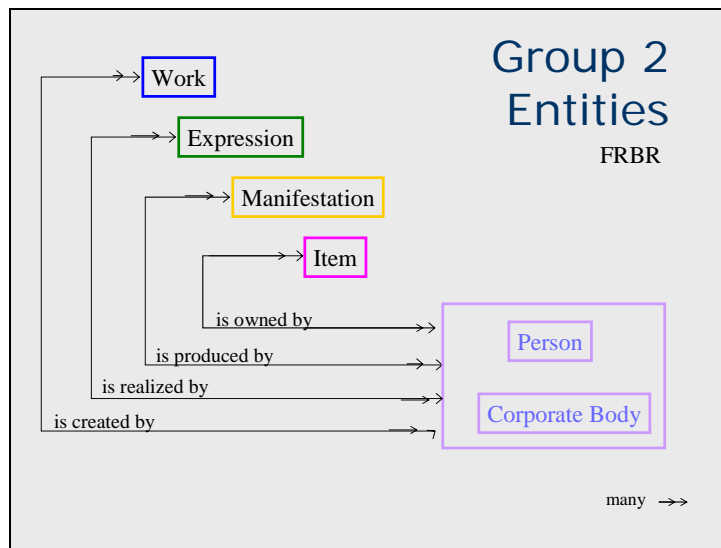
Moving on, the attributes in FRBR (or “metadata”). Here you see some of the essential attributes or elements that we associate with each of the primary entities. The elements are used to build a bibliographic description and its access points.

For a **work**, the main elements are a title, date, possibly its identifier (if it has one, e.g., for rights management). What’s missing? You notice we don’t have “author” as an attribute for work or expression, because that information is treated in this model as a relationship between the work or expression and a person or corporate body. In naming a work, it’s essential to declare that relationship to the name of the creator of the work, but by keeping it a separate entity we are better able to control the display of the names.

Yet you see at manifestation, we have the statement of responsibility as found on the item being cataloged - that is information unique to the manifestation and is description.

For our purposes the activity of **recording** an expression, turns an entity into something of interest to a library - something we would add to library collections and catalog - for which we would provide bibliographic control – namely a manifestation. In the digital world often we find the basic bibliographic description is an integral part of a digital object - the software that helps create the digital object or digitizes an analog object, can automatically provide a basic set of metadata, that is attributes or data elements. Think of how the software for word processing, like Microsoft’s Word, suggests a name for your document based on the first words you type - ironically the “titles” for early manuscripts were the first line of text. Software now also automatically provides the date you created it. There is already a camera that has built in the MPEG-7 standards for creating basic metadata for the digital images it captures.

So we can envision the automatic creation of some of the attributes we’d need for bibliographic control for description and access. The draft of RDA builds on this to emphasize transcribing what you see for the basic elements of bibliographic description following the principle of accurate representation.



Let me now move on to the entities and relationships for what FRBR calls the Group 2 entities: person and corporate body.

You see the relationships with the Group 1 entities in this picture:

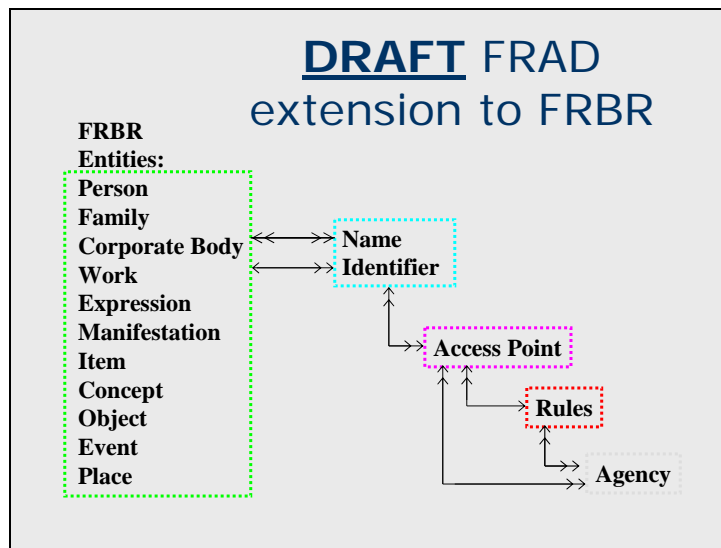
work is created by a person or corporate body

expression is realized by a person or corporate body

manifestation is produced by a person or corporate body

item is owned by a person or corporate body.

These are entities, that are of interest in authority work - as well as the Group 3 entities we will soon see. The names of these entities are controlled when they are used as access points in bibliographic records.



This picture is meant to give you an idea of the direction FRAD is taking.

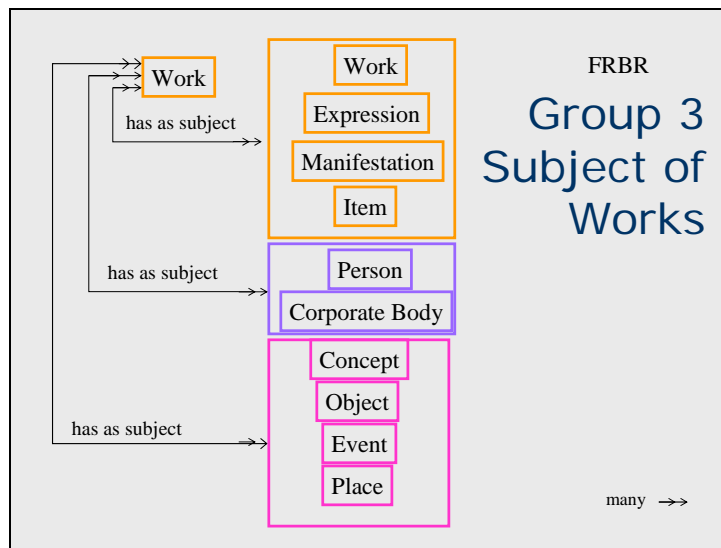
The arrows represent the relationships:

An FRBR entity at the left is “known by” a name and is “assigned” an identifier.

An access point is “based on” a name or identifier.

Access points are “governed by” rules that are in turn “applied by” an agency, and the access points are also “created by” or “modified by” an agency.

There is another IFLA Working Group that started in 2005 to look at Group 3 entities and Subject authority records. That group is being led by Marcia Zeng of Kent State University and Maja Žumer from the National Library of Slovenia.



Group 3 entities in FRBR, introduce all the entities that can be the subject of works :

concept

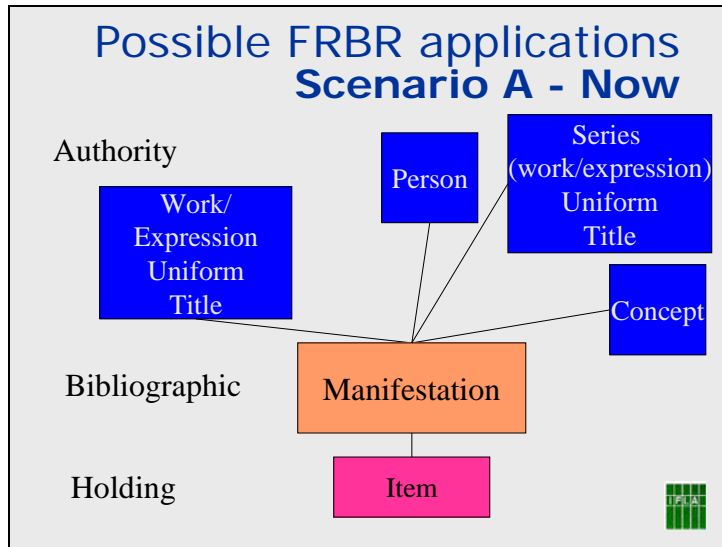
object

event

place

and all of the Group 1 and Group 2 entities because, for example, you can have a work about another work. (Activities now of the FRSAR group)

So we have all these entities and relationships and attributes in the conceptual model – how might we apply this model? There are many ways we could apply FRBR and some system designers are exploring several implementation scenarios.

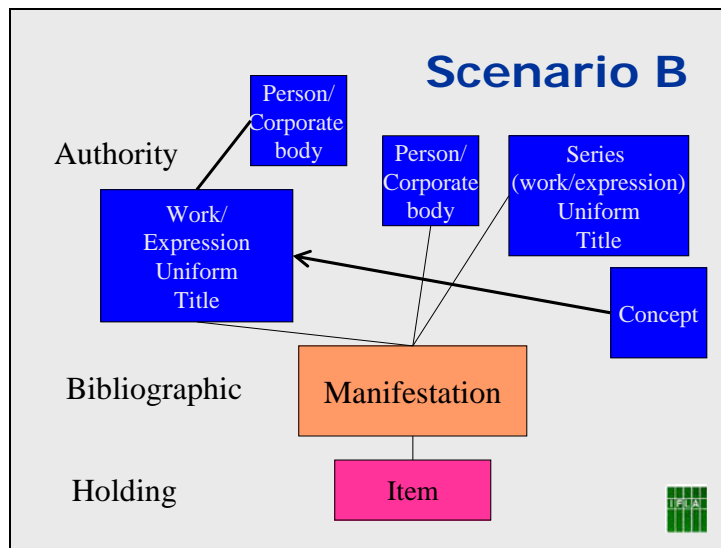


Let's look at this scenario A: it's basically how we catalog now and you can see the FRBR entities and relationships as we walk through this scenario: Our current MARC format has authority records, bibliographic records, and holdings records.

{click} we start with an item we have at hand. In some of our systems- the attributes of an **item** are documented in a holdings record.

From the item we have at hand, we construct a {click} bibliographic record building the set of data elements that are intended to describe the **manifestation**, that is any copy held anywhere, so the record can be re-used by others in a shared cataloging environment.

We also make {click} authority records to control the way we identify **works** and **expressions** {click} that are embodied in the **manifestation** we are describing, and that in turn may be linked to a name authority record for the **person** {click} or **corporate body** that is responsible for creating the **work** or **expression** or to {click} subject headings or concepts. In some integrated library systems this link between the bib and authority records is real, which also makes database maintenance and global update changes easier than when these links are not present.




Here's a scenario B for the future, where we would make use of authority records for works and expressions and do more linking directly at the authority record level for the {click} creators of works and {click} classification and subject headings that are appropriate to the work. Those authority records would also be available to display for each linked bib record, and we could save cataloger's time by not needing to classify and provide subject headings for all the manifestations of that same work/expression combination. Using FRBR helps us see these possibilities and hopefully will aid system designers in developing future systems.

I really like this model, but we need to experiment to see if this is best or perhaps there is a better implementation model for FRBR.

FRBR Benefits

- Collocation
 - ↳ Better organization to catalog
- Easier cataloging
- Reduction in cataloging load
 - ↳ Work only cataloged once for all expressions of it
 - ↳ Expression only cataloged once for all manifestations of it
 - ↳ Item cataloging (already simple) remains the same



VTLS was the first vendor of integrated library management systems to embrace FRBR and to test their vision of how to implement FRBR. In their presentations they explain their views of the benefits of applying FRBR to their system:

They find that with FRBR, the principle of collocation is expressed in a much better way because you have a better and more easily understood organization to the catalog. It's more intuitive to group the translations and editions and performances (expressions) and the various manifestations of those expressions under the work that is contained in those manifestations.

Cataloging is easier with FRBR because the system can take advantage of the FRBR structure to automate the inheritance of identifying information – metadata from the highest levels of linked descriptions.

FRBR Work and Expression records need only to be cataloged once. Right now, under traditional cataloging, catalogers have to repeat the Work and Expression elements every time they catalog a new edition of a work. Remember the scenario I showed you earlier of using the authority records for work and expression records with linked subject information....



FRBR Benefits

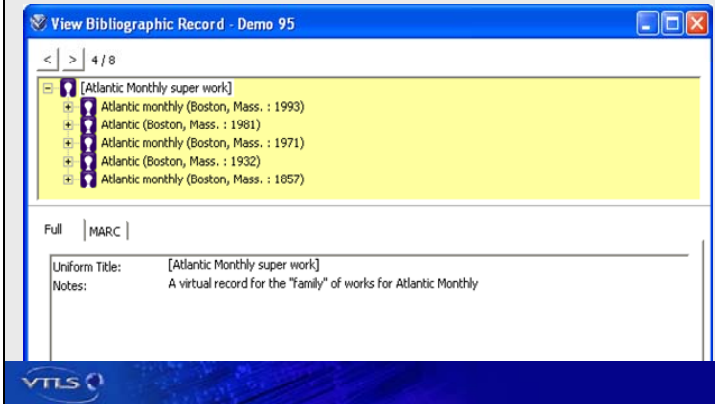
- Circulation: Place holds at “Work” or “Expression” level rather than only at manifestation level
 - (VTLS and OCLC demonstrate this)

In the area of circulation, the VTLS system uses FRBR to make it easier to find all of the manifestations. A user can place holds and requests at the Work or Expression level when they do not really care which edition of a particular title they get; they may just want any copy of the work.

With a traditional system when you had multiple editions of a particular title (Work) you had to place individual requests on each edition (Manifestation). With a FRBR system, you only have to place a request at the Work or Expression level, and ANY item of ANY Manifestation will satisfy the request. So, system design can take advantage of this FRBR model to improve user service.

Serial Example

Each of the five basic titles in the “family” of Atlantic Monthly is a “sub-work” under the Super Work.



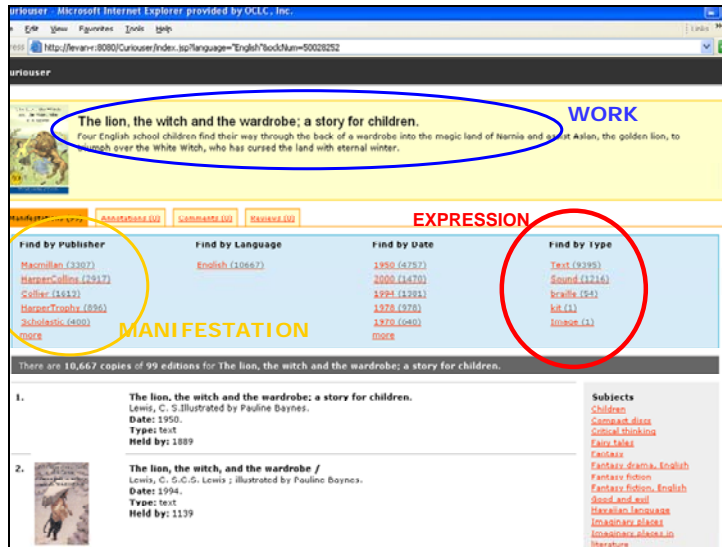
The screenshot shows a window titled "View Bibliographic Record - Demo 95". It displays a tree view of a bibliographic record. The root node is "[Atlantic Monthly super work]". Below it are five sub-works, each with a plus sign icon and a date in parentheses: "Atlantic monthly (Boston, Mass. : 1993)", "Atlantic (Boston, Mass. : 1981)", "Atlantic monthly (Boston, Mass. : 1971)", "Atlantic (Boston, Mass. : 1932)", and "Atlantic monthly (Boston, Mass. : 1857)". Below the tree view, there are tabs for "Full" and "MARC". The "Full" tab is selected, showing the following information:

Uniform Title:	[Atlantic Monthly super work]
Notes:	A virtual record for the "Family" of works for Atlantic Monthly

The VTLIS logo is visible in the bottom left corner of the window.

Here's another example for a serial in the VTLIS system. A serial is a work of works within works – going from individual articles within an issue or special volume to the entire serial title and its history over time. This is where Virtua uses records for “superworks” as collocating devices to show the user the history of this serial and to offer paths for whatever time period or format the user needs.

The entire family of works can be brought together to help users find the specific articles they want in the specific format or carrier they want – paper, online, or whatever. We hope future systems will bring together the abstracting & indexing services article level resources to combine when searching.




[http://levan-r:8080/Curiouser/index.jsp?language="English"&oclcNum=50028252](http://levan-r:8080/Curiouser/index.jsp?language=)

We're starting to see more applications of FRBR – at OCLC and RLG and in other realms.

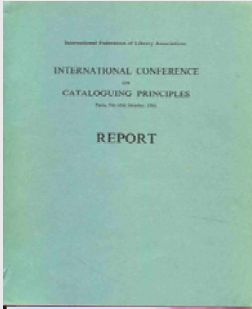
This shows Curiouser from OCLC – they also have been experimenting with FRBR for some time now and you will see it reflected in WorldCat and in some of their other products like xISBN and Fiction Finder. RILIN also applied FRBR in its Red-Light-Green project.

Here in Curiouser you see the work and its manifestations are identified and the user of this tool can select among the expressions – at the right are the language groupings for English expressions in the FRBR terminology and the ability to group together the expressions by their type of content – text, sound, image, etc. And then at the bottom you are shown the specific manifestation information. On the right are all the subjects from the bibliographic records so the user may choose to move to other parts of the database to explore what else is available on those topics.



Cataloguing Principles

- 1961 – IFLA's "Paris Principles"



The image shows the cover of a report titled "INTERNATIONAL CONFERENCE ON CATALOGUING PRINCIPLES" held in Paris in 1961. The cover is light green with black text. The text on the cover includes "International Federation of Library Associations" at the top, followed by "INTERNATIONAL CONFERENCE ON CATALOGUING PRINCIPLES" and "Paris, 19-20 October, 1961". At the bottom, it says "REPORT".

I mentioned earlier that IFLA has been the center for international bibliographic standards for many decades. In 1961, IFLA held a meeting of cataloguing experts in Paris that resulted in the famous "Paris Principles," as we know them today. These principles formed the foundation of nearly all of the major cataloguing codes now used worldwide. This was an incredible step towards global harmonization of cataloguing practices, which still remains a worthy goal.



IME ICC Goals & Objectives

- Goal
 - Increase the ability to share cataloguing worldwide by
 - Promoting standards
- Objectives
 - Develop "Statement of International Cataloguing Principles"
 - See if rules/practices can get closer together
 - Make recommendations for an International Cataloguing Code

The goal of the current series of IFLA regional meetings that we call IME ICC (IFLA Meetings of Experts on an International Cataloguing Code), is

to increase the ability to share cataloguing information worldwide by promoting standards for the content of bibliographic and authority records used in library catalogues.

The objectives are to

Develop an internationally agreed statement of cataloguing principles and

Also to see if we can get closer together in cataloging practices and to

make recommendations for a possible future International Cataloguing Code.


IME ICC Regional Meetings

- IME ICC1 – Europe/Anglo-American
http://www.ddb.de/standardisierung/afs/imeicc_index.htm 
- IME ICC2 – Latin America-Caribbean
<http://www.loc.gov/imeicc2> 
- IME ICC3 – Middle East
<http://www.loc.gov/loc/ifla/imeicc/> 
- IME ICC4 – Asia
<http://www.nl.go.kr/icc/icc/main.php> 

The 4 meetings of IME ICC to date (see slide) – I recommend going to these Websites for more information.

Next/Final Meeting – IME ICC5


- 2007 August 15-16 subSaharan Africa
- Hosted by the National Library of South Africa, Pretoria, South Africa



The fifth and final IME ICC meeting in August 2007 is scheduled for the sub-Saharan African countries before the IFLA meeting in Durban. That meeting will be hosted by the National Library of South Africa in Pretoria.

The participants from all of the meetings have found this to be a very exciting process, and we hope it will provide guidance to simplify cataloging practices and improve the user's experience in finding information they need. We expect a final statement in 2008 after worldwide discussion of the recommended draft.

So, now, all of these international efforts are influencing the work on RDA – which is to be a new cataloging standard.



New standard: why?

- Simplify rules
 - Encourage use as a content standard for metadata schema
 - Encourage international applicability
- Provide more consistency
- Address current problems
- Principle-based
 - To build cataloger's judgment
 - Encourage application of FRBR/FRAD₂₅

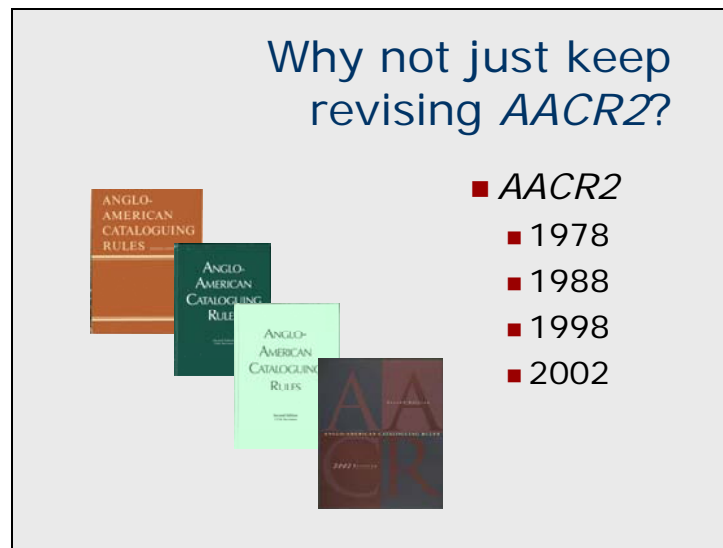
Why do we even need a new cataloging standard?

Briefly stated, we now have an opportunity to simplify our cataloging code and to establish it as a content standard for resource description for various metadata schema, and to encourage its use worldwide.

We need a new code that will be more consistent across the various types of content and media, and that demonstrates the commonalities of different types of resources.

We want to address current problems with rules in AACR2, such as with GMDs (general material designators) and for cataloging digital materials, and we want to change the approach to cataloging, to get back to more principle-based rules that build cataloger's judgment and are simple to use.

We also want a new standard that will encourage the application of the FRBR data model (Functional Requirements for Bibliographic records) and now also FRAD (Functional Requirements for Authority Data).



But you might ask why can't we just keep revising AACR2 to achieve these goals?

As you may know, AACR2 has been under constant revision since it was first published in 1978.

The revisions to AACR2 in 1988, 1998, and 2002 (and updates through 2005) all basically followed the same structure as AACR2 with revised rules to reflect the incremental changes over time, such as updated rules for electronic resources and integrating resources.

Unfortunately, there are a lot of problems with AACR2 that simply make it too inflexible for it to be useful as the basis for a new cataloging code. It's

Too print-biased

The Structure is based on class of materials, which doesn't work for digital materials

And it perpetuates outdated terminology from the days of card catalogs (referring to main entries, added entries, headings, and so on) .

AACR2 Structure



- Part I – Description
 - Chapters by “Class of materials”
 - ISBD areas, order of elements, punctuation
- Part II – Choice and Form of Entries (headings – main and added entries)
- Appendices
- Glossary
- Index


The slide features the RDA logo (R in blue, D in green, A in blue) on the left and the title 'Background' in blue text on the right. Below the title is a horizontal blue line. A bulleted list follows, with red square markers. The list item '1997: International Conference on the Principles and Future Development of AACR, Toronto' is followed by five sub-items: 'Worldwide experts invited by the JSC', 'Reviewed principles', 'Content vs. display', 'Logical structure of the rules', 'Seriality', and 'Internationalization'. The number '28' is in the bottom right corner.

RDA Background

- 1997: International Conference on the Principles and Future Development of AACR, Toronto
 - Worldwide experts invited by the JSC
 - Reviewed principles
 - Content vs. display
 - Logical structure of the rules
 - Seriality
 - Internationalization

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In 1997, the Joint Steering Committee for Revision of the Anglo-American Cataloguing Rules held the **International Conference on the Principles & Future Development of AACR** in Toronto. Experts from around the world were invited to share in developing an action plan for the future of AACR. At that time we thought we would be developing AACR3. Some of the recommendations from that meeting have guided the thinking about new directions, such as the desire to document the basic principles that underlie the rules and explorations into content versus carrier and the logical structure of AACR; and some have already been implemented, like the new views of seriality – with continuing resources and harmonization of those cataloging standards among the ISBD, ISSN, and AACR communities. Other recommendations from that meeting are still dreams, like further internationalization of the rules for their expanded use worldwide as a content standard for bibliographic and authority records. But we now want to make those dreams a reality in RDA.




From AACR3 to RDA

- **April 2005** – decided to start afresh by rethinking and restructuring AACR3
- Came as a result of concerns that a revision of AACR2 would not accommodate digital resources
- Adopted the name *Resource Description and Access*

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The original work after the 1997 conference was a draft revision of AACR2 called AACR3. However, by April 2005, the plan had changed. The reactions to the initial draft of AACR3 particularly raised concerns about coverage of digital resources. So, a new structure and plan were developed and the name was changed to *Resource Description and Access* to emphasize these two important tasks of description and access. Importantly from the world perspective, we removed the Anglo-American emphasis so we could take a more international view.



New Cataloging Environment

- Wide range of information carriers: wider depth & complexity of content
- Metadata (bibliographic information) created by a wider range of personnel in and outside libraries; some using new metadata schemas (Dublin Core, etc.)
- Descriptive data in digital form (ONIX, etc.)

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Beyond acknowledging that there are problems with the old rules, we also need to keep in mind that we now have a totally new cataloging environment in which we need to work. This environment continues to evolve to be more and more Web based.

We need to catalog a much wider range of information carriers that we used to, and we also need to deal with a much wider depth and complexity of content in the resources that we catalog.

Metadata is now created by a wider range of personnel: not only by skilled professional catalogers, but by support staff, non-library staff, and also publishers - who have a wider range of skill levels. Some of us are using structures other than the MARC format for our records – like using Dublin Core for some digital resources.

And we now have access to descriptive data for resources in digital form – even when the resource is in standard book format, the descriptive data is now available from many publishers using ONIX – that is information we can capture for our bibliographic records.



GOALS:
RDA will be ...

- A new standard for **resource description and access**
- Designed for the **digital** environment
 - Developed as a web-based product (paper also available)
 - Description and access of all digital and analog resources
 - Resulting records usable in the digital environment (Internet, Web OPACs, etc.)

31

The Joint Steering Committee stated our goals for RDA as follows

We envision RDA as a new standard for resource description and access, designed for the digital environment.

By digital environment we mean three things: RDA will be


A Web-based tool

A tool that addresses cataloguing digital and all other types of resources

And a tool that results in records that are intended for use in the digital environment – through the Internet, Web-OPACs, etc.

RDA *RDA will be ...*

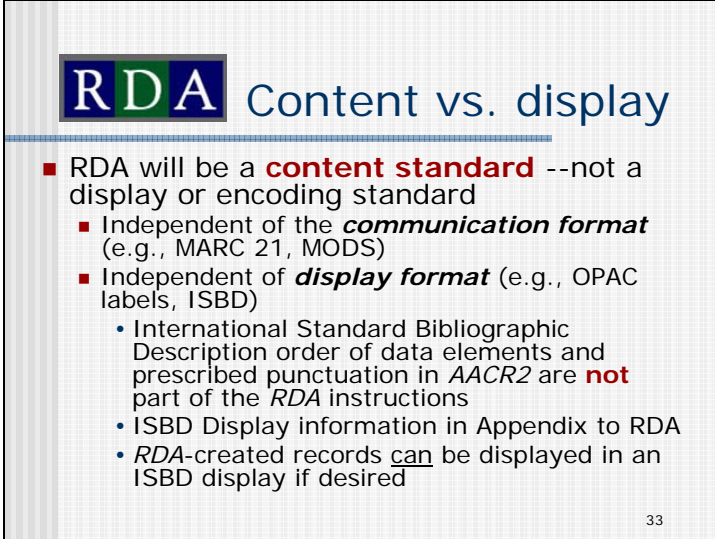
- “A multinational ***content standard*** providing bibliographic description and access for the variety of media and formats collected by libraries today”
- Developed for use in English language environment;
- it can also be used in other language communities



32

RDA will be “a multinational content standard for providing bibliographic description and access for a variety of media and formats collected by libraries today” – quote from the Strategic Plan. [click]

While developed for use in English language communities, RDA can also be used in other language communities – we are expecting that other countries will translate it and adjust its instructions to follow preferred language and script conventions – just as there are now many translations of AACR2. Options are also being added to allow for use of other languages and scripts, other calendars, other numeric systems, etc.

The slide features the RDA logo (R in blue, D in green, A in blue) on the left. To its right, the title "Content vs. display" is written in a blue serif font. Below the title is a horizontal line. The main content consists of a bulleted list with red square markers. The first bullet states that RDA is a content standard, not a display or encoding standard. The second bullet notes independence from communication formats like MARC 21 and MODS. The third bullet notes independence from display formats like OPAC labels and ISBD, and includes three sub-bullets: one stating that AACR2 punctuation is not part of RDA instructions, one stating that ISBD display information is in an appendix, and one stating that RDA records can be displayed in an ISBD display if desired. A small number "33" is in the bottom right corner of the slide frame.


RDA Content vs. display

- RDA will be a **content standard** --not a display or encoding standard
 - Independent of the **communication format** (e.g., MARC 21, MODS)
 - Independent of **display format** (e.g., OPAC labels, ISBD)
 - International Standard Bibliographic Description order of data elements and prescribed punctuation in *AACR2* are **not** part of the *RDA* instructions
 - ISBD Display information in Appendix to RDA
 - *RDA*-created records can be displayed in an ISBD display if desired

33

The JSC decision to make RDA a content standard rather than a display standard was really a key to moving RDA forward. This allowed us to move beyond the ISBDs – by not requiring ISBD punctuation (which is irrelevant to metadata communities, and not used in many OPACs anyway).

However, we need to ensure that RDA records can be displayed in an ISBD display if a library still wants to do that – in this way we can honor our agreement to keep RDA compatible with the ISBDs. So we're trying to build in compatibility yet flexibility at the same time. There will be an appendix on ISBD display of RDA records to indicate the order of elements and punctuation to be used.




RDA will ...

- Support FRBR user tasks
 - Find, identify, select, obtain
- Enable users of library catalogs, etc., to find and use resources appropriate to their information needs

34

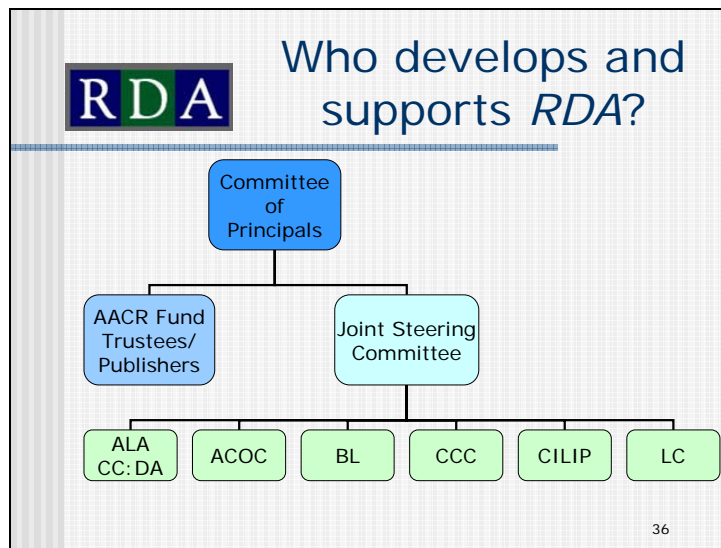
RDA will support the FRBR user tasks for find, identify, select, and obtain (you'll see in a few minutes more about how we're aligning the structure of RDA with these user tasks) AND Enable users to find and use resources appropriate to their information needs.

Users are the reason we catalog at all! So all of these are part of our goals and objectives for RDA.



Creating RDA - Process

The image shows a presentation slide with a blue grid header. The RDA logo is in the top left, followed by a horizontal line. The main title 'Creating RDA - Process' is centered below the line.



I want to briefly show you the ownership and management that oversees the development of AACR and now RDA. There is a Committee of Principals – who are the directors or their representatives from the Canadian, UK, and US professional library associations: that is, the American Library Association, the Canadian Library Association, the Chartered Institute of Library and Information Professionals (CILIP) as well as the British Library, the Library of Congress, and the National Library of Canada – now called Library and Archives Canada. The National Library of Australia will soon be added. There is also the group of co-publishers who manage the AACR Fund (which is the money generated by sales of AACR that supports the maintenance and development of the rules) – the publishers are at ALA, the Canadian Library Association, and CILIP. Then there is the Joint Steering Committee for Revision of the Anglo-American Cataloguing Rules (name changed in April to JSC for Development of RDA) comprised of representatives from the constituent organizations: the American Library Association's Association for Library Collections & Technical Services' Committee on Cataloging: Description and Access (CC:DA), the Australian Committee on Cataloguing (ACOC), the British Library, the Canadian Committee on Cataloguing (whose representative is also from the Library and Archives Canada), CILIP, and the Library of Congress. Your rep is the ALA representative to the JSC - has been Jennifer Bowen of the University of Rochester; the new representative is John Attig of Penn State University.



Here we are a couple of weeks ago in Ottawa! This is both the Joint Steering Committee for Development of RDA and our project manager and RDA editor – missing is our Secretary who was taking the picture!

Left to right – Marg Stewart, CCC (LAC)

Marjorie Bloss – RDA Project Manager)

Hugh Taylor – CILIP

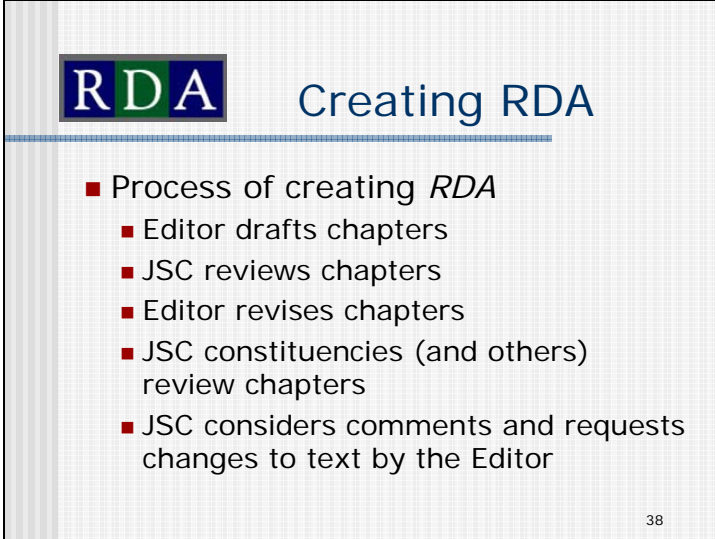
John Attig – ALA

Myself – Library of Congress

Deirdre Kiorgaard – ACOC and the chair of the Joint Steering Committee

Alan Danskin – BL

And Tom Delsey, the RDA editor



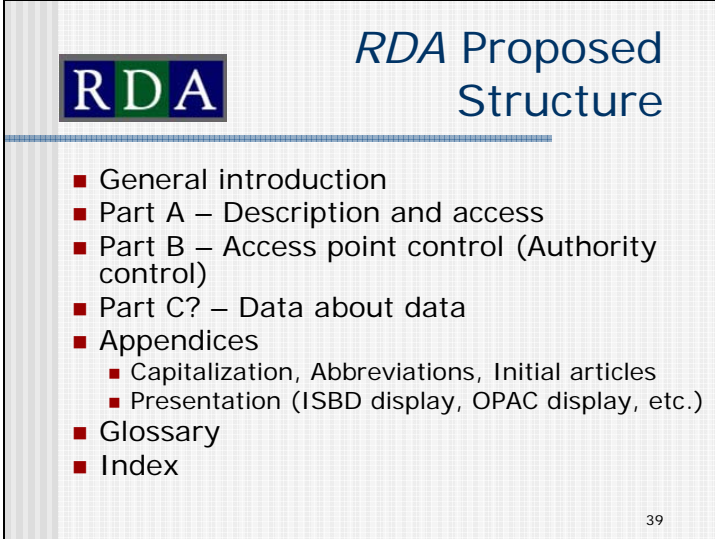
The slide features the RDA logo (R in blue, D in green, A in blue) on the left and the title 'Creating RDA' in blue text on the right. Below the title is a horizontal blue line. The main content is a bulleted list with red square markers. The list describes the iterative process of creating RDA, involving drafting, reviewing, revising, and finalizing chapters through the JSC and its constituencies. The slide number '38' is located in the bottom right corner.

- Process of creating *RDA*
 - Editor drafts chapters
 - JSC reviews chapters
 - Editor revises chapters
 - JSC constituencies (and others) review chapters
 - JSC considers comments and requests changes to text by the Editor

Many people from many countries are involved in the process of creating RDA. It isn't the work of just the JSC members. You see the various stages of the process here.

[review slide]

The JSC is getting comments and suggestions from around the world as many countries outside the Anglo-American community use AACR2 and now many other countries that had their own rules are interested in the development of RDA itself and the possible use of that standard in their countries. Comments are also being made by publishers and archivists among others.

The slide features the RDA logo in the top left corner, consisting of the letters 'R', 'D', and 'A' in white on a dark blue background. To the right of the logo, the title 'RDA Proposed Structure' is written in a blue serif font. Below the title, a horizontal blue line separates it from a bulleted list of sections. The list includes: 'General introduction', 'Part A – Description and access', 'Part B – Access point control (Authority control)', 'Part C? – Data about data', 'Appendices' (with sub-bullets for 'Capitalization, Abbreviations, Initial articles' and 'Presentation (ISBD display, OPAC display, etc.)'), 'Glossary', and 'Index'. The number '39' is located in the bottom right corner of the slide's border.

RDA *RDA Proposed Structure*

- General introduction
- Part A – Description and access
- Part B – Access point control (Authority control)
- Part C? – Data about data
- Appendices
 - Capitalization, Abbreviations, Initial articles
 - Presentation (ISBD display, OPAC display, etc.)
- Glossary
- Index


39

RDA is still evolving after each comment period for each section of the rules. As of 2 weeks ago:

There will be a general introduction to provide background for teaching the rules (or as we now call them, the “instructions”) and building cataloger’s judgment.

Part A on description and access, Part b ON

At the end are appendices about capitalization, abbreviations, and initial articles plus an appendix on how to present descriptive data (including the ISBD display format) and how to present authority data, as well as a glossary and an index.




Part A
Chapters 0-5

0. Introduction
1. General guidelines for resource description
2. FRBR **"Identify"** the resource
3. Carrier description - FRBR **"Select"**
4. Content description - FRBR **"Select"**
5. Acquisition and access information - FRBR **"Obtain"**

40

This is the current outline for the first chapters of Part A – numbered 0 to 5. The red annotations show how the chapters align with the FRBR user tasks, “identify”, “select”, and “obtain”. [read chapter titles]

These chapters generally cover what was in Part 1 of AACR2 but the arrangement is very different from AACR2. It’s now organized by data elements not by ISBD areas – although it tends to follow a similar order of the elements that ISBD used. This new structure will provide more flexibility to describe resources, such as many digital resources, that have multiple characteristics. It also makes more apparent that all types of materials follow the same basic principles and rules and indicates when there need to be alternatives for special kinds of resources.



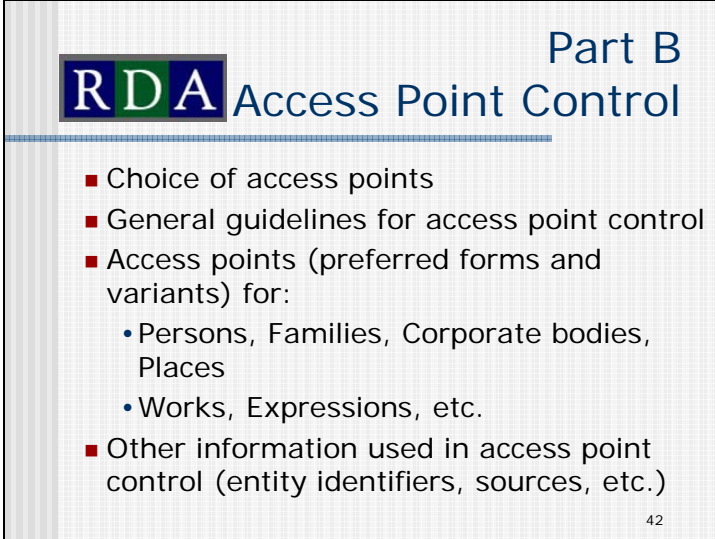
Part A Ch. 6-7 "Relationships"

FRBR user task **"Find"**

■ Chapter 6: Relationships between FRBR Group 1 and Group 2 entities Persons Corporate bodies Families	■ Chapter 7: Relationships among FRBR Group 1 entities Works Expressions Manifestations Items
---	--

41

The next two chapters of RDA will address relationships – these include relationships between FRBR Group 1 and Group 2 entities, that is, persons, corporate bodies, and families that play some role with respect to the resource being described; as well as bibliographic relationships: related works, expressions, manifestations, and items (as in the right column, that is, relationships **AMONG** the FRBR Group 1 entities).

The slide features the RDA logo (R in blue, D in green, A in blue) on the left. To its right, the text 'Part B' is positioned above 'Access Point Control'. A horizontal blue line separates the title from the bulleted list. The list contains four main items, with the third item having two sub-items. A small number '42' is located in the bottom right corner of the slide frame.

RDA Part B
Access Point Control

- Choice of access points
- General guidelines for access point control
- Access points (preferred forms and variants) for:
 - Persons, Families, Corporate bodies, Places
 - Works, Expressions, etc.
- Other information used in access point control (entity identifiers, sources, etc.)

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Our current plan is that Part B of RDA will now cover access point control, what we now call authority control, to describe controlled access for precision in searching.


Part B will be generally guided by the new “FRAD” model (Functional Requirements for Authority Data).

It will cover choice of access points, including choice of a primary access point, which will be described in the context of naming works and expressions within a resource.

Part B of RDA will cover both authorized or “preferred” forms of names and the variant forms that could be used as references or could just be in clusters for alternative display forms.

It will also cover the construction of preferred forms of names for persons, corporate bodies, families, and preferred titles for works and expressions.

So Part B will cover much of what is now covered in AACR2 Part 2. It will also address the recording of these decisions in authority records, now not a part of AACR2.




Part C?

- Elements that are data about data
 - Description based on
 - Etc.

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Part C or perhaps an appendix – not yet sure – just decided on this at the April meeting 2 weeks ago.

 New Terminology	
<i>AACR2 terms</i>	<i>RDA terms</i>
Heading	Access point
Authorized heading	Preferred access point
Main Entry	Primary Access point
Added Entry	Secondary Access point
Authority control	Access point control
Uniform title	Preferred title
	Name of the work (to include name of creator when applicable)

44

We're making an attempt to update the card catalog-based terminology that remains in AACR2. The AACR term "heading" of course comes from the text that was typed at the top or "head" of catalog card. We will be replacing this term with "access point. So Main Entry and Added Entry headings will become "primary access point", and "secondary Access Point" although we are still discussing these terms and will explore eliminating the need to declare any access point as "primary" other than for the purpose of naming a work. We're also moving away from using the term "authority control" toward using "access point control". The term Uniform Title is problematic because it actually has three different definitions in AACR2, so instead of using this term, we're proposing to use the term 'Preferred title' which can be for either a work, an expression, or for when we want to cite the manifestation that they are contained in.

We had earlier proposed using the term "citation" within RDA, but we discovered there's a lot of confusion about that term. The law community, in particular uses the term "citation" to mean something very specific. So we are trying to avoid the term "citation" in RDA.



New elements


- Media, Carrier, and Content Types to replace GMDs
- Other examples:
 - File characteristics for digital materials
 - Video format characteristics
 - Custodial information for archival resources
 - Braille characteristics

45

New elements are being added to RDA: some to solve problems in AACR2 and some to add elements that are lacking in AACR2. (this is in the revised chapter 3 now out for comment – devised categories with the ONNIX/RDA Framework)

Data elements for Media type, Carrier type, and Content type will be used instead of the GMDs (general material designators) currently in AACR2. One of the complaints about the GMDs now found in AACR2 is that they are not consistent – being a mixture of content and carrier types and the lists are incomplete.

Other elements, such as the examples shown on the slide, are missing in AACR2 - file characteristics, video formats, archival custodial information and Braille characteristics.



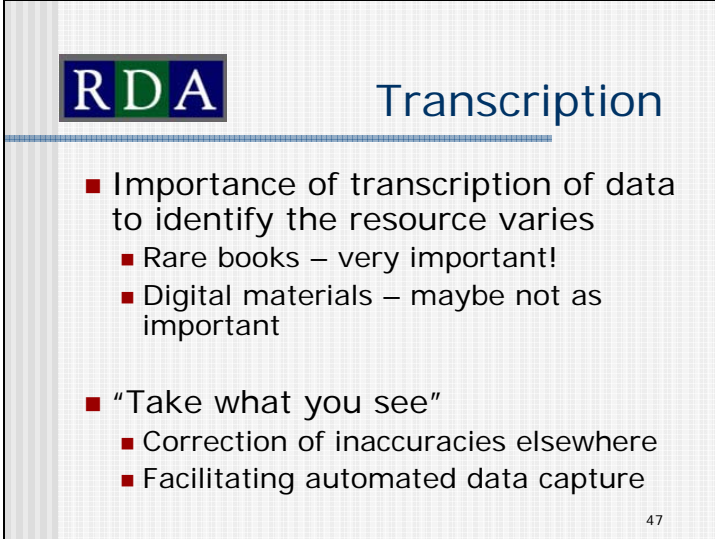
How many elements?

- Required mandatory data elements (instruction 1.4)
- Within the text, data elements will be labelled as:
 - "Required"
 - "Optional"

46

The JSC is identifying a required minimal number of mandatory data elements needed to identify a resource. All of the RDA instructions for the data elements will include a label indicating if a data element is "Required" or is "Optional."

We also hope the elements will each be labelled to make explicit which FRBR entity is being described: work, expression, manifestation, or item.


The slide features the RDA logo in the top left corner, consisting of the letters 'R', 'D', and 'A' in white on a dark blue background. To the right of the logo, the word 'Transcription' is written in a blue serif font. Below the title, there is a bulleted list with red square markers. The list contains three main points: 'Importance of transcription of data to identify the resource varies', 'Take what you see', and 'Facilitating automated data capture'. Each main point has sub-points. The first sub-point under the first main point is 'Rare books – very important!'. The second sub-point under the first main point is 'Digital materials – maybe not as important'. The second sub-point under the second main point is 'Correction of inaccuracies elsewhere'. The third sub-point under the second main point is 'Facilitating automated data capture'. The number '47' is located in the bottom right corner of the slide.

RDA Transcription

- Importance of transcription of data to identify the resource varies
 - Rare books – very important!
 - Digital materials – maybe not as important
- “Take what you see”
 - Correction of inaccuracies elsewhere
 - Facilitating automated data capture

47

One of the big issues that we’re dealing with is reassessing the importance of transcribing data from a resource. This has always been an important aspect of our cataloging tradition, but we’re finding that with describing digital materials, transcription often is much less important than for other resources. For example, transcription is extremely important for rare books catalogers. One of our goals is to make RDA more usable to metadata communities and not create more problems for automated record matching and duplicate detection. We’re addressing this by simplifying the process of transcription by “taking what you see” on the resource – this eliminates many of the rules that instruct catalogers to alter the data that they are transcribing. For example, in RDA inaccuracies will be recorded as they are found on the item, and the corrected data will be provided separately, if needed. This and other simplifications to the transcription rules are designed to facilitate automated data capture and reusing metadata from other sources, such as from publishers – that some of us now capture from ONIX data. Catalogers will also have more flexibility in RDA to take capitalization and abbreviations as they appear on the resource.



RDA as Web Tool - Repetition !!


- More repetition of the same or similar information in the instructions: due to how the RDA online product will be used:
 - Users will be going directly to an instruction, not starting at the beginning and “leafing” through the pages: won’t see as much before and after

48

When you read the drafts, one of your reactions may be that there is too much repetition of the same wording in more than one place. Because RDA will be issued as a Web-based product and because the “behavior” of users interacting with RDA in that form is different from how users read a printed text, each instruction has to be able to stand on its own.

When we use a printed text, we gain a lot of the meaning from the context in which a statement is given: what precedes and what follows it gives us more information. In an online product, the context needs to be clear for each instruction.

So it’s hard I know to not comment or be distracted by the repetition when reading printed drafts, but we need to remember the tool will look much differently in its Web form.

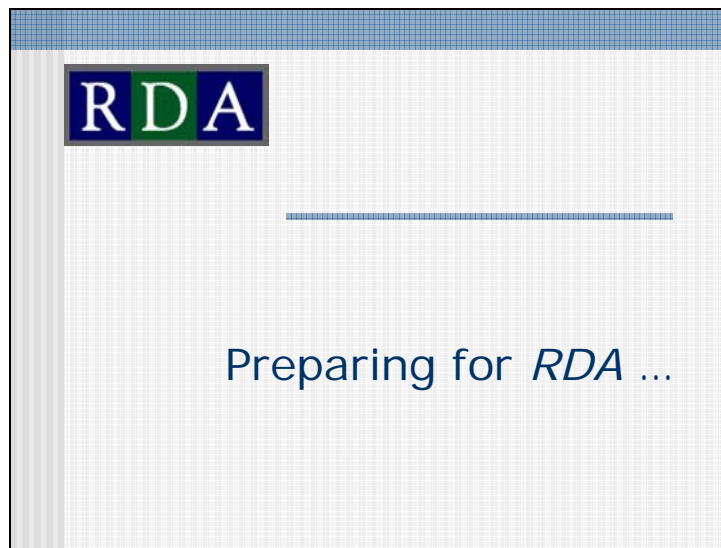


Customizing *RDA* *Web Tool*


- Instructions will be coded by type of content, mode of issuance, etc.:
- Can create a customized version of the Web-based *RDA* to see only the instructions you need or want to see

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What you won't be able to see in the Web RDA or in a printout of the drafts is the coding of the instructions in the file behind the scenes. The instructions are being coded by the JSC Editor so that you can create a customized view of RDA if you want. For example, if you are a map cataloger, you could indicate that you want to see only the general instructions and the specific instructions related to cartographic resources.



So, what can you do to start preparing for RDA implementation?



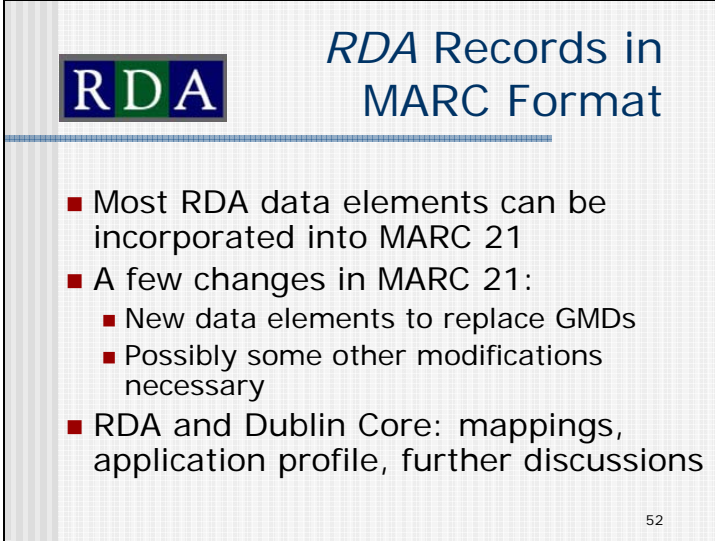
Questions and Answers

- FAQ (“Frequently Asked Questions”) on adopting RDA and other topics available on the JSC Web site:

<http://www.collectionscanada.ca/jsc/rda.html>

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If you haven't already looked at the Frequently Asked Questions – with answers – on the JSC Web site, I recommend you read them. I'm touching on some of the information in this overview today but you'll find much more information there. If there's a question you have and it's not in those lists, notify John Attig, your ALA representative to the Joint Steering Committee, so he can forward it to the JSC for possible addition. There are instructions about this on the ALCTS Web site.



The slide features the RDA logo (R in blue, D in green, A in blue) on the left. To its right is the title "RDA Records in MARC Format" in blue text. Below the title is a horizontal blue line. The main content is a bulleted list with red square markers. The list items are: "Most RDA data elements can be incorporated into MARC 21", "A few changes in MARC 21:" followed by two sub-bullets: "New data elements to replace GMDs" and "Possibly some other modifications necessary", and "RDA and Dublin Core: mappings, application profile, further discussions". The number "52" is in the bottom right corner of the slide frame.

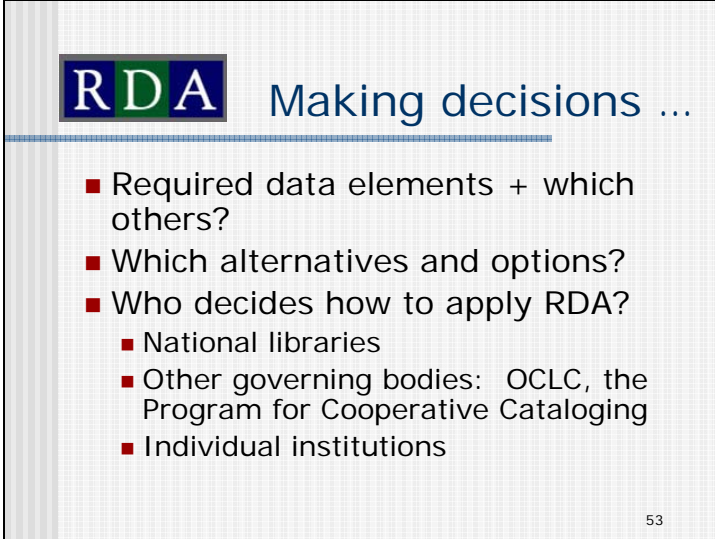
- Most RDA data elements can be incorporated into MARC 21
- A few changes in MARC 21:
 - New data elements to replace GMDs
 - Possibly some other modifications necessary
- RDA and Dublin Core: mappings, application profile, further discussions

Those of you using MARC 21 will continue to do so – we expect that most *RDA* data elements can be incorporated into the existing MARC 21 structure using current MARC 21 guidelines for coding and order of data elements.

However, there are a few changes that we know about now, such as the new data elements to replace the GMD (type of media, content, and carrier). There may also be other changes that we haven't identified yet.

If you are using Dublin Core or some other metadata schema in some capacity in your institution, you may want to consider whether there are advantages to using RDA for the content of metadata records that might increase the compatibility of DC and MARC records.

We recognize that there are some significant differences between the data models behind RDA and Dublin Core, and the JSC has started to have some conversations directly with members of the DC community – we had a meeting with two Dublin Core and IEEE-LOM members last October, and I have just returned this week from another meeting with representatives from those metadata communities.

The slide features the RDA logo (R in blue, D in green, A in blue) followed by the title "Making decisions ...". Below the title is a bulleted list of five items. The first three items are main points, and the last three are sub-points under the second main point. A small number "53" is located in the bottom right corner of the slide frame.

RDA Making decisions ...

- Required data elements + which others?
- Which alternatives and options?
- Who decides how to apply RDA?
 - National libraries
 - Other governing bodies: OCLC, the Program for Cooperative Cataloging
 - Individual institutions

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One thing everyone will need to keep in mind about RDA is that there are options and alternatives to some of the instructions. Your institution or the cooperative program or regional consortium that you belong to may want to state its views on which options to prefer – or they may decide to leave it all to cataloger’s judgment. Only a few data elements will be required, so just as now your institution may want to declare its choices in requiring more.

There will be alternatives for how to record relationships – and your institution may wish to declare the method you prefer for particular types of relationships.

The national libraries are already talking about how and when to make these implementation decisions. We expect that other governance entities such as OCLC and the Program for Cooperative Cataloging (PCC) will also need to make decisions about what they want to require for various record levels, and how data should be encoded.

And individual libraries may also need to make decisions.



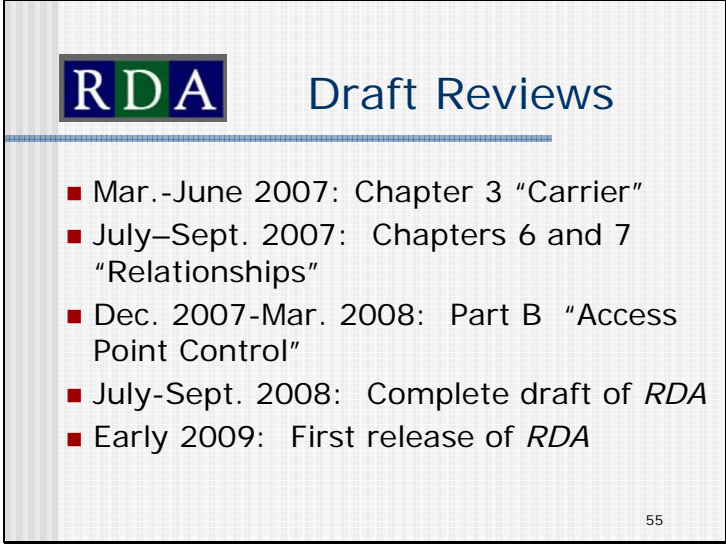
Retrospective catalog maintenance?

- No: Intend for RDA records to be compatible
- Need for retrospective adjustments when integrating *RDA* and *AACR2* records will be minimal, if at all

54

If you remember the transition between AACR and AACR2 with 'desuperimposition' and its split files and closing of card catalogs, you may be wondering whether libraries will have to make major changes like that to our existing records.

At this point, while RDA is still in development, we can't promise that there will not be a need for ANY changes to existing records. And although we recognize that it is easier now to change the form of names used as access points than it was in the 1970's, we are making every effort to avoid major changes - another one of our goals is to have the RDA records be compatible in a file with AACR2 records.



The slide features the RDA logo (R in blue, D in green, A in blue) and the title "Draft Reviews" in blue text. Below the title is a horizontal blue line. A bulleted list follows, detailing the review schedule. The slide number "55" is in the bottom right corner.


- Mar.-June 2007: Chapter 3 "Carrier"
- July-Sept. 2007: Chapters 6 and 7 "Relationships"
- Dec. 2007-Mar. 2008: Part B "Access Point Control"
- July-Sept. 2008: Complete draft of *RDA*
- Early 2009: First release of *RDA*

The timeline for getting from today to the first release of RDA is shown here.

If you've seen previous versions of the timeline, you'll realize that this is different from what we had planned last year. The JSC worked out this new plan in October 2006 and so far, we are sticking to it.

The advantage of this particular plan is that it allows more time for the review of the complete draft of Chapter 3 (underway now), and later this year the review of a revised draft of Chapters 6 and 7, followed by a review of Part B, and also a complete draft of the entire standard next year; with the first release of the Web tool in early 2009

Some people say "why will it take you so long?" Given the need to consult with constituent groups in four countries, plus other rule making bodies worldwide and other communities beyond libraries, this is actually pretty ambitious.



Commenting on *RDA* Drafts

- *RDA* drafts & documents available at:
<http://www.collectionscanada.ca/jsc/rda.html>
- Informal discussion: subscribe to RDA-L
(link on page above)
- Formal comments: within the U.S., use web
form via ALCTS website
(www.ala.org/ALCTS)

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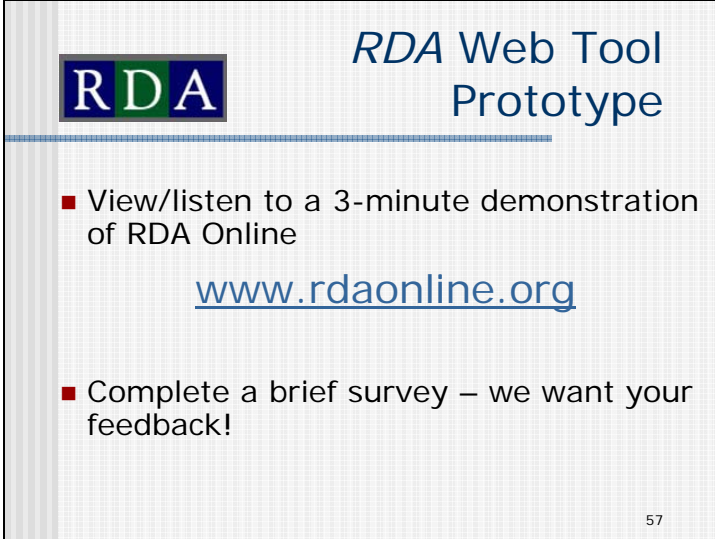
As we are developing RDA, I encourage you all to actively participate in reviewing the drafts of RDA.

The drafts are being posted to this URL. We have also made public the vast majority of JSC documents through the JSC website, so you can read as many as you want.

If you want to simply engage in informal discussion of RDA, consider joining our discussion list, RDA-L – there is a link for how to join at the address shown on this slide. Please note that comments posted to RDA-L will not automatically be considered by the JSC for inclusion in RDA (although we are monitoring the list and are open to new ideas that we could incorporate).

To have your comments FORMALLY considered for inclusion in RDA, the JSC has asked that people within the JSC constituent countries (US, UK, Canada, Australia) use the committees that are already in place – so in the U.S, that's CC:DA for your comments – and they have a CC:DA web form set up for you at the URL at the bottom of this slide. They do ask that you justify your recommendations.

There is a lot to do and your help really is welcome.


The slide features the RDA logo (R in blue, D in green, A in blue) in the top left corner. To its right, the text "RDA Web Tool Prototype" is displayed in a blue serif font. A horizontal blue line separates the header from the main content. Below the line, there are two bullet points: the first points to a 3-minute demonstration of RDA Online, with the URL www.rdaonline.org centered below it; the second points to a brief survey. The number "57" is located in the bottom right corner of the slide frame.

RDA *RDA Web Tool
Prototype*

- View/listen to a 3-minute demonstration of RDA Online
www.rdaonline.org
- Complete a brief survey – we want your feedback!

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We currently have a prototype of the online RDA available that anyone can view and comment on – I encourage you all to have a look at it. We hope it will give you a good idea of how the product will work – although fair warning – it's just a prototype at this stage. We are also hoping a new prototype will be available in mid or late 2008 to give more people a feel for the actual Web product. And we are still seeking feedback (online questions) on what you like, don't like or want to see in this new tool.

The slide features the RDA logo in the top left corner, consisting of the letters 'R', 'D', and 'A' in white on a dark blue background. To the right of the logo, the title 'RDA Products' is displayed in a blue serif font. Below the title, a horizontal blue line separates it from a bulleted list. The list contains two main items, each marked with a red square bullet. The first item is 'Online (Web Tool) product first:', followed by a sub-bullet 'Different pricing structures'. The second item is 'Additional formats: co-publishers want information from you', followed by two sub-bullets: 'Focus groups at ALA Annual Conference in June 2007' and 'Questions also to be posted online for your responses'. In the bottom right corner of the slide, the number '58' is printed in a small font.


RDA RDA Products

- Online (Web Tool) product first:
 - Different pricing structures
- Additional formats: co-publishers want information from you
 - Focus groups at ALA Annual Conference in June 2007
 - Questions also to be posted online for your responses

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The co-publishers have told us there will be different pricing structures for different types of users. The Library of Congress also will be taking the necessary steps to be able to incorporate RDA into Cataloger's Desktop.

But, the co-publishers know that some constituencies will want a printed-text-on-paper product and perhaps other products. There will be several opportunities for potential users of RDA to give the publishers information about what you want: 1) through focus groups at the ALA Annual Conference in Washington, D.C. in June 2) through an online response to specific questions that the co-publishers will announce or also through the RDA Prototype URL that I showed earlier or 3) you can send comments to John Attig, your CC:DA representative. Your views count and we do want to hear from you. We also hope the co-publishers will have the "real" system to demonstrate at the IFLA Conference in August 2008 in Quebec City, but they are still discussing that. Do you have any questions?

A presentation slide with a light blue background and a dark blue header. The header contains the RDA logo (R in red, D in green, A in blue) and the text "Training for RDA". Below the header is a list of three bullet points. The slide number "59" is in the bottom right corner.

RDA Training for *RDA*

- Catalogers *will* need some training in RDA – hope it’s more like “orientation”
- Groups that provide training are beginning to make plans
- Online product will assist with learning

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A quick mention about training for RDA – we are beginning to talk with various groups that generally provide cataloging training (such as ALA/ALCTS and the Library of Congress) about the need to provide training for RDA. But we also are looking at options for people who can’t attend conferences and workshops, and so are looking at “train the trainer” models as well. The Committee of Principals stresses that we hope the training will be more “orientation” to the new instructions, and that they will be easy to comprehend, so extensive training will NOT be needed.

It’s a bit early to develop a specific orientation plan because the content of RDA is not yet set. But you will definitely start hearing more about this over the next two years.

We anticipate that the nature of the RDA product itself will help catalogers to learn to use RDA, because it will lead you through the cataloging process and allow catalogers to customize the product for the type of resources that they are cataloging.

So RDA – built on conceptual models and internationally agreed principles, designed for the digital environment, intended to make cataloging easier and result in rich information for our users.



Data Model Meeting

- British Library, London 30 April – 1 May 2007
- A meeting was held which examined the fit between *RDA: Resource Description and Access* and other metadata models.
- <http://www.bl.uk/services/bibliographic/meeting.html>
- Participants:
 - Tom Baker
 - Robina Clayphan
 - Tom Delsey
 - Gordon Dunsire
 - Diane Hillmann
 - Alistair Miles
 - Mikael Nilsson
 - Andy Powell
 - Barbara Tillett



Recommendations

- The meeting participants agreed that RDA and DCMI should work together to build on the existing work of both communities.
- The participants recommend that the Committee of Principals and DCMI seek funding for work to develop an RDA Application Profile -
- specifically that the following activities be undertaken:
 - development of an RDA Element Vocabulary
 - development of an RDA DC Application Profile based on FRBR and FRAD
 - disclosure of RDA Value Vocabularies using RDF/RDFS/SKOS




Outcomes

- The benefits of this activity will be that:
 - the library community gets a metadata standard that is compatible with the Web Architecture and that is fully interoperable with other Semantic Web initiatives
 - the DCMI community gets a libraries application profile firmly based on the DCAM and FRBR (which will be a high profile exemplar for others to follow)
 - the Semantic Web community get a significant pool of well thought-out metadata terms to re-use
 - there is wider uptake of RDA



Further suggestion

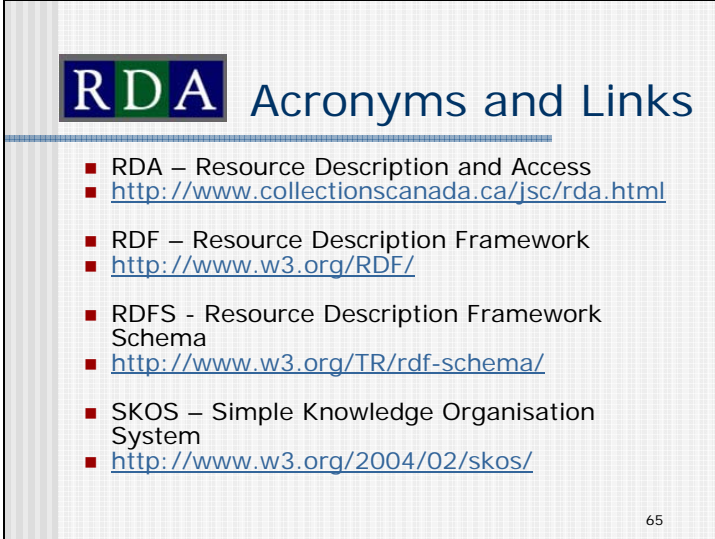
- The meeting further suggests that DCMI and DC Application Profile developers consider the value of using conceptual models such as FRBR as the basis for describing intellectual or artistic creations



Acronyms and Links

- DC – Dublin Core
- DCMI – Dublin Core Metadata Initiative
<http://dublincore.org/>
- DCAM – Dublin Core Abstract Model
<http://dublincore.org/documents/2007/04/02/abstract-model/>
- FRAD – Functional Requirements for Authority Data
<http://www.ifla.org/VII/d4/wg-franar.htm>
- FRBR – Functional Requirements for Bibliographic Records
<http://www.ifla.org/VII/s13/frbr/frbr.htm>
- IEEE/LOM – Institute of Electrical and Electronic Engineers/Learning Object Metadata
<http://ltsc.ieee.org/wg12/>

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The slide features a title 'RDA Acronyms and Links' with 'RDA' in a stylized logo. Below the title is a bulleted list of acronyms and their corresponding URLs. The slide number '65' is located in the bottom right corner.

RDA Acronyms and Links

- RDA – Resource Description and Access
■ <http://www.collectionscanada.ca/jsc/rda.html>
- RDF – Resource Description Framework
■ <http://www.w3.org/RDF/>
- RDFS - Resource Description Framework Schema
■ <http://www.w3.org/TR/rdf-schema/>
- SKOS – Simple Knowledge Organisation System
■ <http://www.w3.org/2004/02/skos/>

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Planning for the Semantic Web, we can see using RDA as part of the building blocks with its model re-usable by other communities via the Internet.