Outcomes of the November 2016 RDA Steering Committee Meeting

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Presentation at RDA Forum

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MAJOR TOPICS

- Agreement to adopt the IFLA Library Reference Model (LRM)
  - Formerly known as FRBR-LRM
  - Final draft awaiting approval by IFLA in 2017
- Implications of and continuing work on the RDA Toolkit Restructure and Redesign (3R) Project
- Community and Working Group proposals and discussion papers

IFLA Library Reference Model

IFLA LRM

- Consolidates and updates the three Functional Requirements models
  - FRBR, FRAD, and FRSAD
- High level conceptual model
  - Uses entity-relationship modeling framework
  - Focused on user tasks, not library operations
- Based on and fully compatible with
  - CIDOC Conceptual Reference Model
    - Developed for use in museums and cultural heritage institutions – a target area for RDA growth
  - Object-oriented FRBR ($FRBR_{oo}$)
    - LRM can be seen as a "core" version of $FRBR_{oo}$

LRM User Tasks

- Built from the user tasks in the existing FR models:
    - Find
    - Identify
    - Select
    - Obtain
    - Explore
- Focus on end user's information seeking process
    - Administrative metadata out of scope for the model
    - Rights metadata in scope only as it relates to the "obtain" task

LRM Entities

- Eleven entities defined as the key objects of interest to users
  - *Res* introduced
    - Superclass of all the other entities
    - Any entity in the universe of discourse
  - *WEMI* retained from FRBR
    - With some definition tweaks
  - *Agent* created
    - Superclass of *Collective Agent* and *Person*
    - Encompasses what RDA currently terms: "person, family, or corporate body"

LRM Entities

- Eleven entities defined as the key objects of interest to users (continued)
  - *Collective Agent* introduced
    - A gathering or organization of persons bearing a particular name and capable of acting as a unit
  - *Person* redefined
    - Must be a human being – a significant change from FRAD
  - *Nomen* created
    - Association between an entity and a designation that refers to it
    - A label isn't the *nomen*, it's a *nomen string* attribute

LRM Entities

- Eleven entities defined as the key objects of interest to users (continued)
  - *Place* added
    - Can be contemporary or historical, on Earth or extra-terrestrial
    - Can have fuzzy boundaries over time
  - *Time-span* introduced
    - A period of time with a measurable duration (no matter how short)
    - May be more or less precise; can include geological eras

LRM Attributes

- None required
  - Recorded if applicable and easily ascertainable – and relevant
- 37 included
  - Considered representative, not exhaustive
- Many can be recorded as a literal string *or* a URI
- *Category* and *Note* attributes declared for *Res*
  - These can be sub-typed for any other entity

LRM Attributes

- *Representative expression* attribute – New
  - Deemed essential in characterizing the *Work*
  - Values taken from a representative or canonical *Expression* of the *Work*
  - Do not have to identify the particular expression which served as the source for the values
- *Manifestation statement* attribute – New
  - A statement normally transcribed from a manifestation
  - Helps users understand how the resource represents itself, for example:
    - Publication statement
    - Statement of responsibility

IMPLEMENTING LRM IN RDA

- RDA will be an instantiation of LRM
- RSC decided not to explicitly implement *Res*
  - Everything in RDA will be a refinement of *Res* and its attributes, relationships, etc.
- Need new content
  - New entities: *Agent, Collective Agent, Nomen, Place, Time-span*
  - Guidelines/instructions for aggregates
    - Possible now that LRM has settled on a single model
- Redefine *Person*
  - While accommodating fictitious entities associated with manifestations, in a new/different way

RDA Toolkit Restructure and Redesign (3R) Project

To be completed by April 2018

3R Project – Content Changes: LRM + …?

- Along with implementing LRM, the 3R Project allows the RSC to address long-standing problems
  - Completely removing instructions that say: "This instruction has been deleted as a revision to RDA."
  - Implementing the 4-fold path throughout RDA: four ways to capture data
    - Unstructured description
    - Structured description (includes authorized access points)
    - Identifiers
    - URIs
  - Clarifying the "transcribe" vs. "record" instructions
  - Further developing guidelines for recording pagination and foliation

3R Project – Content Changes: LRM + …?

- The RSC will also rethink presentation of instructions, etc.
  - Generalizing where possible
  - Restructuring layout
    - Create general guidance chapters followed by entity-based chapters
  - Developing a new approach to relationship designators
    - Possibly incorporating new terms at the same time
  - Building 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

3R Project – Freezing RDA Content

- No changes to 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 English base text
  - No proposals or fast track changes considered in 2017
    - But the 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

2017 PROPOSALS AND DISCUSSION PAPERS

RSC Proposals and Discussion Papers

- Considered 23 proposals and discussion papers, along with responses to them from various communities
  - Included a joint ALA/CCC discussion paper – a first time collaboration
  - Approved all or part of 15 proposals
    - The remainder were referred to the 3R Project
- Discussion paper topics
  - RDA and WGA treatment of aggregates
    - WGA = FRBR Working Group on Aggregates (final report, 2011)
  - Accompanying material in RDA

RSC Proposals and Discussion Papers

- Proposals centered on
  - Internationalization
  - Provenance
  - Relationships
  - Music resources
  - Rare resources
- The 3 ALA proposals were approved
  - Adding a controlled vocabulary for regional encoding
  - Improving instructions for laws governing more than one jurisdiction
  - Providing greater flexibility in creating variant access points

RSC Proposals and Discussion Papers

- For more information, see
  - The RSC website, specifically
    - http://www.rda-rsc.org/documents
  - My semi-annual RSC report to CC:DA
    - Linked at: http://alcts.ala.org/ccdablog/?p=3055

QUESTIONS?

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