

# The Evolution of Library Descriptive Practices



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# Here's what we're going to talk about...



- **BIBLIOGRAPHIC CONTROL**
- No, wait...
  - “Descriptive enrichment”? (a la Roy Tennant)
  - “Resource description”?
- How about...
  - Cataloging?
  - Metadata?
  
- Let's put aside the terminology for the time being

# Big changes are in the works



- Change is constant
- But we're in a particularly active period right now
- Two major developments to know about
  - Resource Description and Access (RDA)
  - Library of Congress Working Group on the Future of Bibliographic Control

# Resource Description and Access (RDA)



# RDA: A new cataloging code



- “...designed for the digital world”
- “...comprehensive set of guidelines and instructions on resource description and access covering all types of content and media”
- Formerly known as AACR3; name change signifies a fundamental change in approach

# Why a new cataloging code?



- AACR2 originally released in 1978
  - incremental revisions since
- A new code can take advantage of
  - current discovery and display technologies
  - recent data modeling work
- Need an overhaul to support
  - separation of data from presentation
  - usability outside of the library community

# Joint Steering Committee for Development of RDA



- American Library Association (ALA)
- Australian Committee on Cataloguing (ACOC)
- British Library (BL)
- Canadian Committee on Cataloguing (CCC)
- Chartered Institute of Library and Information Professionals (CILIP)
- Library of Congress (LC)

# What does this mean for digital libraries?



- The code itself will be promoted for use in communities that did not use AACR
- The data produced according to this code will be structured to facilitate use in the wider information environment
- Those that use the code will have a greater understanding of the conceptual models it uses

# Principal influences



- FRBR and FRAD
- DCMI Abstract Model
- <indec> Metadata Framework (funny, because this initiative doesn't seem to be current)
- Statement of International Cataloguing Principles under development by IFLA

# Explicit relationships to external models



- RDA “element” is FRBR/FRAD attribute or relationship
- RDA element “sub-types” are DCMI Abstract Model “sub-properties”
- Elements and sub-types categorized a la <indec> (but this categorization doesn’t appear in the draft text)
- RDA elements contain “literal value surrogates,” “non-literal value surrogates,” “typed value strings,” or “plain value strings” as defined in the DCMI Abstract Model

# FRBR and FRAD mappings



- Map RDA elements to FRBR/FRAD relationships or attributes
- “Mapping” is a funny term here
  - RDA “element” is FRBR/FRAD attribute or relationship, BUT
  - Neither is a traditional element set that one usually does mappings for
    - ✦ RDA is a “content standard”
    - ✦ FRBR/FRAD are “conceptual models”
- Is this a good thing?
  - Meeting in the middle seems reasonable
  - But could add to the terminological confusion

# Structure



- Organization influenced by FRBR
- 37 (!) chapters, grouped into 10 sections
  - 1: Recording attributes of manifestation and item
  - 2: Recording attributes of work and expression
  - 3: Recording attributes of person, family, and corporate body
  - 4: Recording attributes of concept, object, event, and place
  - 5: Recording primary relationships between work, expression, manifestation, and item
  - 6: Recording relationships to persons, families, and corporate bodies associated with a resource
  - 7: Recording subject relationships
  - 8: Recording relationships between works, expressions, manifestations, and items
  - 9: Recording relationships between persons, families, and corporate bodies
  - 10: Recording relationships between concepts, objects, events, and places

# Database implementation scenarios



- Scenario 1: Relational / object-oriented database structure
- Scenario 2: Linked bibliographic and authority records
- Scenario 3: 'Flat file' database structure (no links)

# Current proposed timeline



- Major reorganization announced October 2007
- December 2007-March 2008: Review of sections 2-4, 9
- July-September 2008: Review of complete draft of RDA
- 2009: Release of RDA

# DCMI/RDA Task Group



- **Proposed outcomes**
  - Definition of an RDA Element Vocabulary
  - Disclosure on the public web of RDA Value Vocabularies using RDF/RDFS/SKOS technologies
  - (*DC Application Profile for RDA based on FRBR and FRAD*)
- **Goals**
  - Integration into the larger web environment
  - Usable by machines in addition to humans
- **Work so far**
  - Use cases
  - Cataloger scenarios
  - Preliminary extracted element list from RDA drafts
  - Preliminary extracted inline vocabulary list from RDA drafts (55!)

# RDA/MARC Working Group



- Just announced March 13
- Will represent implementation scenario 2: linked bibliographic and authority records
- “drafting proposals for review and discussion by the MARC community in June 2008”
- “identify what changes are required to MARC 21 to support compatibility with RDA and ensure effective data exchange into the future”

# RDA and ONIX



- Early effort to harmonize RDA with other metadata standards, but no recent activity is obvious
- April 2006: announcement from RDA and ONIX to “develop a common framework for resource categorization”
- August 2006: framework [version 1.0](#) released
- January 2007: [article](#) describing the effort in D-Lib Magazine
- Unclear if this work has influenced GMDs or other features of RDA

# So this sounds promising!



- Well, only if the rules actually achieve these lofty, if laudable, goals

Construct the preferred access point representing a libretto or song text, by adding Libretto to the preferred access point representing the work or part(s) of the work if the work or part(s) contain only the text of an opera, operetta, oratorio, or the like, or Text to the preferred access point representing the text of a song. For compilations by a single composer, add Librettos if the compilation contains only texts of operas, operettas, oratorios, or the like; otherwise add Texts.

- Several chapters are already scheduled to be released “later”
- Unclear if conceptual rigor and terminology from external abstract/conceptual models will result in benefits in production environments

# Reaction to RDA drafts (1)



- Rhetoric is at times heated
- Mostly taking place on email lists and the blogosphere, rather than in the published literature
- Falls into two camps:
  - Too extreme
  - Not extreme enough
- Both sides have some valid points; both miss the point entirely at times

## Reaction to RDA drafts (2)



- The “too extreme” argument goes something like:
  - Abandonment of ISBD as a guiding structure is a step backwards
  - FRBR is just theory, we shouldn't be basing a cataloging code on it
  - Language is incomprehensible
  - Planned changes don't give enough benefit to warrant the costs of implementation
  - No other communities are going to use this thing anyways
- See Gorman paper for an example

The RDA seeks to find a third way between standard cataloguing (abandoning a slew of international agreements and understandings) on the one hand and the metadata crowd and boogie-woogie Google boys on the other.

# Reaction to RDA drafts (3)



- The “not extreme enough” argument goes something like:
  - Too much data relegated to textual description
  - Length and specificity make it unlikely to be applied outside of libraries
  - Plans to remain backwards-compatible prohibit needed fundamental changes
  - FRBR integration only a surface attempt
- See Coyle/Hillmann paper for an example

Particularly problematic is the insistence that notions of "primary" and "secondary," designed to use effectively the space on a 3 x 5 inch card, must still be a part of RDA. Preferences about identification of materials continue to focus on transcription in concert with rules for creating textual "uniform" titles by which related resources can be gathered together for display to users. Similarly, relationships between works or derivations have been expressed using textual citation-like forms in notes.

# Implementation plans



- October 2007 announcement of plans for adoption by
  - British Library
  - Library and Archives Canada
  - Library of Congress
  - National Library of Australia
- Goal is to implement by the end of 2009
- BUT....

# Library of Congress Working Group on the Future of Bibliographic Control



# Overview of work



- Convened in November 2006 by LC Associate Librarian for Library Services Deanna Marcum
- Included representatives from library cataloging, management, education, plus Google and Microsoft
- Held (semi-)public meetings on:
  - Users and Uses of Bibliographic Data
  - Structures and Standards for Bibliographic Data
  - Economics and Organization of Bibliographic Data
- Final report issued January 2008

# Charge



- Present findings on how bibliographic control and other descriptive practices can effectively support management of and access to library materials in the evolving information and technology environment;
- Recommend ways in which the library community can collectively move toward achieving this vision;
- Advise the Library of Congress on its role and priorities.

# Highlights from Executive Summary



- “The Working Group envisions a future for bibliographic control that will be collaborative, decentralized, international in scope, and Web-based.”
- Need to redefine
  - Bibliographic Control
  - The Bibliographic Universe
  - The Role of the Library of Congress
- “The Working Group hopes that this Report is viewed as a “call to action” that informs and broadens participation in discussion and debate, conveys a sense of urgency, stimulates collaboration, and catalyzes thoughtful and deliberate action.”

# Area 1: Increase the efficiency of bibliographic production for all libraries



- Eliminate Redundancies
- Increase Distribution of Responsibility for Bibliographic Record Production and Maintenance
- Collaborate on Authority Record Creation and Maintenance

## Area 2: Transfer effort into higher-value activity



- [aka Enhance access to rare, unique, and other special hidden materials]
- Digitization not very useful without discovery
- Focus on greater coverage and broader access
- Integrate access to these with other library materials
- Ensure products of this work are available in the shared environment

## Area 3: Position our technology for the future



- Develop a More Flexible, Extensible Metadata Carrier
- Integrate Library Standards into Web Environment
- Extend Use of Standard Identifiers
- Develop a Coherent Framework for the Greater Bibliographic Apparatus
- Improve the Standards Development Process, including return on investment and greater focus on lessons from user studies
- *Suspend Work on RDA*

## Area 4: Position our community for the future



- Design for Today's and Tomorrow's User
  - Link external information
  - Integrate user-contributed data
  - Investigate automatically-generated metadata
- Develop test plan for FRBR
- Optimize LCSH for use and re-use

# Area 5: Strengthen the LIS profession



- Build an Evidence Base
- Design LIS Education for Present and Future Needs

# What does this mean for digital libraries?



- If all recommendations find their way into practice:
  - Greater focus on using library data effectively in the wider information environment
  - Non-MARC metadata will have equal standing with MARC
  - We can spend more time on special collections!
  - We'll need to focus more on authority data
  - We can build more advanced services on library data
  - “Digital libraries” will less frequently be a separate thing

# General reactions to WG report



- Heavily in the blogosphere; but see also Thomas Mann citation on handout
- Too extreme argument: (more of these)
  - But LC *has* been functioning as a national library – it's not a business
  - Our standards exist the way they do for a reason
  - Subject precoordination is necessary
  - We can't stop working on RDA now
  - What about the *scholars!*?!?!?
- Not extreme enough argument: (less of these)
  - There is much user data on these issues we could act on
  - Ideas are all well and good, but we need a *plan*
- OCLC response: Don't worry, we've got this all covered

# LC response to WG report



- 4 relevant working groups currently active:
  - Library Services Strategic Plan working group to examine bibliographic records
  - Acquisitions and Bibliographic Access Management Team: key managers in cataloging area
  - Special focus working group: specifically to provide comment and recommendations regarding the WG Report
  - Scholarly Impact Group: impact of the WG Report's recommendations on the scholarly community
- “The most contentious recommendation, that LC cease participation in the development of RDA, will be studied alongside the other one hundred thirteen recommendations without foregone conclusions.”
- WG reports due to LC beginning of May; official LC response end of May

# Back to terminology



- Does it *really* matter what we call “bibliographic control”?
- No, but yes
  - It’s just a label – nobody will understand the concept just from the term with no additional information
  - No simple term will convey the complexity of what we’re trying to do
  - Libraries are currently facing a critical image problem
  - A good term could open doors for libraries in the wider information landscape
  - We need a rethinking of what it is we really *are* trying to do!
  - Now is the time to change terminology if we’re going to
- Any ideas????

# Thank you!



- For more information:
  - [jenlrile@indiana.edu](mailto:jenlrile@indiana.edu)
  - These presentation slides:  
<<http://www.dlib.indiana.edu/~jenlrile/presentations/bbspro8/fbc.ppt>>
  - Handout:  
<<http://www.dlib.indiana.edu/~jenlrile/presentations/bbspro8/handout.pdf> >
  - RDA Home Page:  
<<http://www.collectionscanada.gc.ca/jsc/rda.html>>
  - LC Working Group for the Future of Bibliographic Control Home Page:  
<<http://www.loc.gov/bibliographic-future/>>