

RDA: next steps in its evolution

Chris Oliver, University of Ottawa Library
Thematic Seminar on Resource Description and Access
Library and Archives Canada
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RDA in 2010 versus RDA in 2016

- 2010: starting point not end point
- vision for the future
- sufficient to begin implementation
- expectation: continuing revision and development
 - deferred issues:
 - 5JSC/Sec/6 2008, rev. 2009
 - 6JSC/Sec/1 2010 165 issues of varying priority
- every year, new revisions and changes

RDA in a changing environment

- changing in response to technological advances
 - re-orienting the way we think about bibliographic data
- changing the standard in response to needs of different linguistic and cultural communities
- aligning with changing international standards

Direction of recent changes

- some concrete changes to current instructions
 - clarifications, simplifications
 - working in the current environment

for example, Revision of RDA 3.19.7.3, Recording transmission speed (6JSC/ACOC/6)

Revision to instructions for devised titles in RDA 2.3.2.11 (6JSC/LC/32)

Clarifying instructions for Recording Duration (RDA 7.22) and Note on Carrier (RDA 3.21) (6JSC/ALA/36)

Reflecting the changing environment

- some discussion papers: preparations for future technological environments

for example, Machine-Actionable Data Elements for Measurements, Extent of the Carrier ... Discussion Paper

(6JSC/ALA/Discussion/5)

RDA accommodation of relationship data

(6JSC/TechnicalWG/6)

Make data more machine actionable

- experimental work on instructions for extent, dimensions and duration in chapters 3 and 7
- aim: “to accommodate more machine-actionable data elements”
- proposing a set of measurement sub-elements (with possibility of recording sub-elements or string or both)
- much finer breakdown of data

Make data more machine actionable

for example,

when recording extent of carrier

string **1 volume**

measurement sub-elements

measurement type **carrier extent units**

measurement unit **volume**

measurement quantity **1**

Make data more machine actionable

for example,

when recording dimensions – for a map

string **25 x 35 cm**

measurement sub-elements

measurement type **height**

measurement unit **cm**

measurement quantity **25**

measurement type **width**

measurement unit **cm**

measurement quantity **35**

Reflecting the changing environment

- some proposals: to move beyond “Anglo-American”

for example, Appendix A Capitalization

(6JSC/CCC/Discussion/1)

now Capitalization Instructions WG

Omission of initial articles (6JSC/Chair/3)

Changes for internationalization

- **Appendix A Capitalization**

RDA A.0 Scope

This appendix provides guidelines on capitalization for English and a selected number of other languages. The guidelines apply when transcribing or recording specified elements.

- working group addressing the problem of Appendix A for other language communities

translators – must commit to translate all of RDA

Changes for internationalization

- in 2012, change to RDA instructions: “initial articles” when recording titles of works, etc.

→ main instruction was = omit the initial article from titles of works

but

- significant problem for other cataloguing traditions, especially when “inflected” language, such as German
- responding to issue identified by the Deutsche Nationalbibliothek

→ main instruction became the alternative and new main instruction = include the initial article

Reflecting the changing environment

- some proposals: to maintain alignment with international standards

for example, alignment with 3rd conceptual model, FRSAD

2011

Chapters 12-16, 23, 33-37 (Group 3 entities and "subject") *6JSC/CILIP/1 & 6JSC/LC rep/3*

2013

Treatment of subjects in RDA *6JSC/ALA/Discussion/2*
Proposals for subject relationships *6JSC/Chair/8*

2014

Subject relationship element in RDA Chapter 23
6JSC/ALA/31
High-level subject relationship in RDA *6JSC/TechnicalWG/3*

RDA and FRSAD

- 2015 update → alignment with FRBR/FRAD + **FRSAD**
- some text added mainly in chapter 23 (+ appendix M)
- stays at high level of generality
- creates a place to acknowledge importance of the subject relationship when cataloguing
- allows one to link to outside subject systems – thesauri, classification systems, etc.
- allows scope for perspectives of different disciplines, communities, cultures, etc.

Continuing influence of environment in which RDA is applied

- technological advances and re-orienting how we think about bibliographic data
- changing in response to needs of different linguistic and cultural communities
- aligning with changing international standards

RDA in future technological environments

→ focus on RDA elements, not on encoding

- examples as prepared by the RDA Steering Committee
- prototype of a cataloguing tool focused on recording RDA elements

RIMMF = RDA in many metadata formats

<http://www.marcofquality.com/wiki/rimmf3/doku.php?id=rimmf>

RSC RDA examples

RDA elements

RDA REF	RDA ELEMENT	DATA RECORDED
2.3.2	Title proper *	Lives of girls and women
2.4.2	Statement of responsibility relating to title proper *	Alice Munro
2.5.2	Designation of edition *	Abridged
2.5.4	Statement of responsibility relating to the edition	by Ruth Fraser
2.8.2	Place of publication *	Fredericton, NB, Canada
2.8.4	Publisher's name *	BTC Audiobooks, an imprint of Goose Lane Editions
2.8.6	Date of publication *	date of publication not identified
2.11	Copyright date *	©2005
2.13	Mode of issuance	multipart monograph
2.15	Identifier for the manifestation *	ISBN 0-86492-398-8
3.2	Media type	audio
3.3	Carrier type *	audio disc
3.4	Extent *	3 audio discs
3.5	Dimensions	12 cm
3.16.2	Type of recording	digital
3.19.3	Encoding format	CD audio

RIMMF prototype

Element Label	Text	RDA Rule
Manifestation		
Attributes for identifying the Manifestation †		
Title		2.3
Title Proper		2.3.2
Parallel Title Proper		2.3.3
Other Title Information		2.3.4
Parallel Other Title Information		2.3.5
Variant Title		2.3.6
Earlier Title Proper		2.3.7
Later Title Proper		2.3.8
Key Title		2.3.9
Abbreviated Title		2.3.10
Statement of Responsibility		2.4
Statement of Responsibility Relating to Title Proper		2.4.2
Parallel Statement of Responsibility Relating to Title Proper		2.4.3
Edition Statement		2.5
Designation of Edition		2.5.2
Parallel Designation of Edition		2.5.3
Statement of Responsibility Relating to the Edition		2.5.4

Rigid interpretation for “phase 1”

RDA was designed with an inherent flexibility

but phase 1 of RDA implementation:

- RDA implemented in MARC 21 communities with a very strict interpretation
- only what will work in a MARC environment

→ **vision** – ability to accommodate different ways of putting data together

Rigid interpretation for “phase 1”

for example

recurring RDA instruction:

... record ...identifying attributes as **separate elements**,
as parts of access points, or as both.

→ → → “access point” in **MARC** =

always seen as a **pre-coordinated** string

- in a shared authority file environment – everyone must follow the same procedures

Flexibility for the future

in the words of **Tom Delsey** (2010):

- data elements -- traditionally incorporated into access points with a **pre-set structure** – **but do not necessarily have to be stored and presented in that structure**
- scope in the future for customizing the display of elements that were previously “locked-in” to a pre-set “one-size-fits-all” access point structure
- flexibility **to serve the needs of a particular user community**, or to construct access points “on the fly”, using automated processes to **produce a results set display that responds more directly to the user’s search query.**

User looking for author

Geoffrey Brown

current requirement – disambiguate 1st with dates

Brown, Geoffrey, 1926-

Brown, Geoffrey, 1935-

Brown, Geoffrey, 1941-

Brown, Geoffrey, 1954-

Brown, Geoffrey, 1960-

Brown, Geoffrey, 1963-

Brown, Geoffrey, 1964-

Does user know date of birth?

Geoffrey Brown

future flexibility – use another type of data -- such as profession -- according to user's need

Brown, Geoffrey (Sailor)

Brown, Geoffrey (Psychologist)

Brown, Geoffrey (Banker)

Brown, Geoffrey (Mechanical engineer)

Brown, Geoffrey (Computer scientist)

Brown, Geoffrey (Biologist)

Brown, Geoffrey (Writer on law)

Already see some of this flexibility

one identifier – many forms of a name or title

VIAF Virtual International Authority File

Defoë, Daniel, 1661?-1731                

Defoe, Daniel   

Defoe, Daniel, 1660-1731   

Дефо, Д. 1661-1731 Даниель 

Defoe, Daniel, asi 1661-1731 

Daniel Defoe 

Defoe, Daniel, ca 1663-1731 

De Foe, Daniel 

1731-1660 ديفو، دانيال، 

Defoe, D. 1661-1731 Daniel 

1731-؟1661 ديفو، دانيال، 

VIAF ID: 39375774 (Personal)

Permalink: <http://viaf.org/viaf/39375774>

Data versus transcription

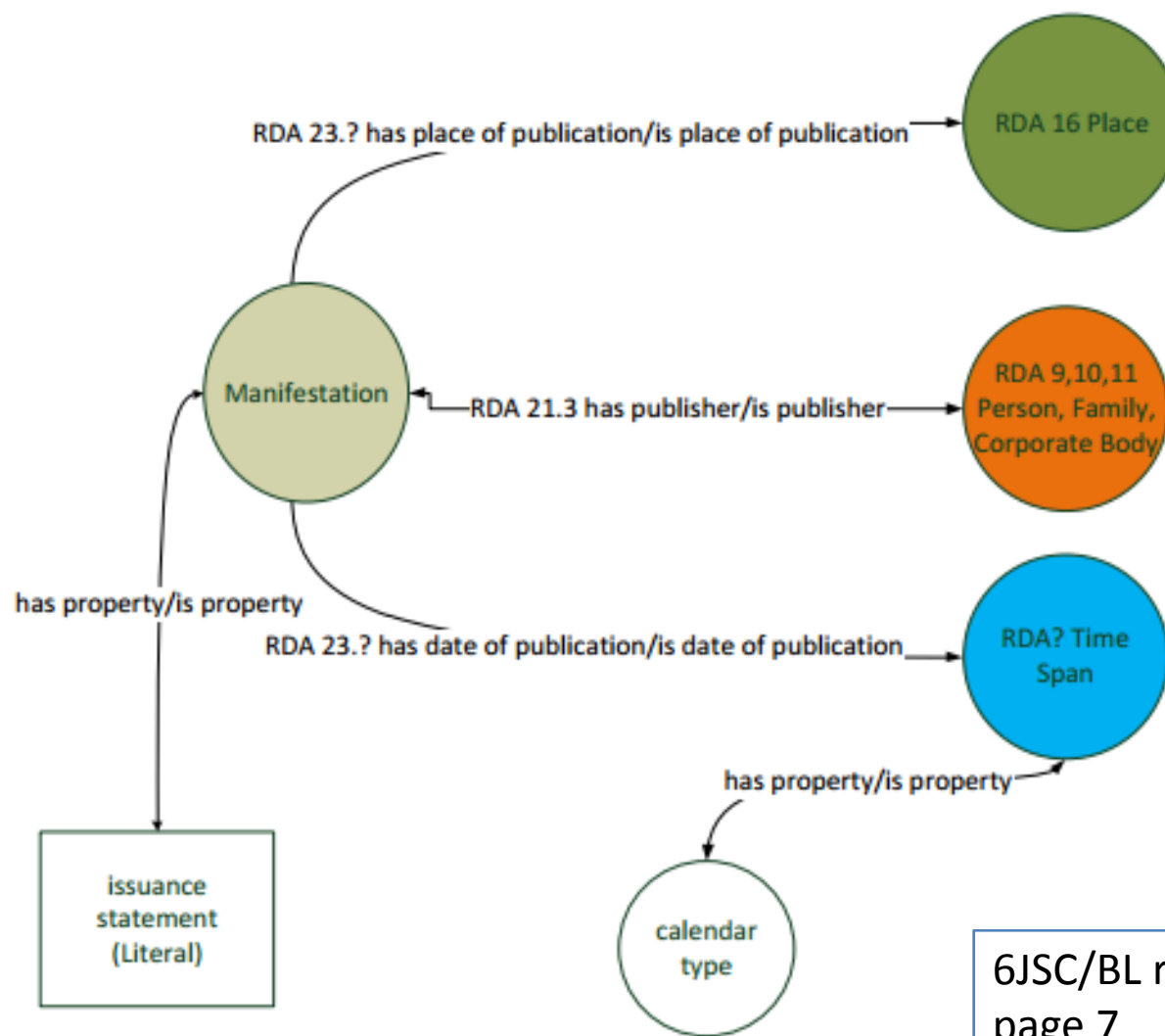
transcription = important for identification

supports principle of representation

but transcribed information \neq machine actionable data

- 2014 British Library discussion paper –(6JSC/BL rep/1)
discussion of approaches to PPDM statements
(PPDM= production, publishing, distribution, manufacturing)
discussion paper identifies tension in RDA:
 - role of transcription
 - moving RDA towards fuller entity-relationship modelling

Data versus transcription



Needs of different linguistic and cultural communities

RDA 0.11

“RDA is designed for use in an international context”

first release in 2010 → evidence of intention
but needs further work

the original four “author” countries >>> all unilingual
English except Canada

Australia

Canada

Great Britain

United States

Awareness of the issues

- observations during development process, such as
 - English language and roman script bias
 - Western cultural bias
- involvement of cataloguing communities around the globe
 - identify “Anglo-American” vestiges that we may not have seen
 - feedback from translation teams improving RDA as an international standard

Internationalization

- translations of RDA → new issues raised
 - for example*, observations from translation teams:
 - phrases that work in English but do not work in other languages
 - distinction between terms in English – not applicable in other languages
- responsiveness to user needs – including needs of those who use RDA
- accommodate global use of the standard

Staying in step with international standards

for example,

- relationship to the FRBR family of conceptual models (FRBR, FRAD and FRSAD)
- alignment with all three FR models → done ✓

but new changes coming

RDA and IFLA conceptual models

→ → consolidation of the three FR models
into one coherent and consistent model

provisional name: **FRBR-LRM**

FRBR Library Reference Model

- usually need to apply all three models but discrepancies between the models makes it challenging
- each model has its own perspective so even concepts that are the same, e.g., user task “*find*” → defined differently in each model

To find

FRBR: to find entities that correspond to the user's stated search criteria ...

FRAD: Find an entity or set of entities corresponding to stated criteria ... or to explore the universe of bibliographic entities using those attributes and relationships.

FRSAD: Find one or more subjects and/or their appellations, that correspond(s) to the user's stated criteria, using attributes and relationships;

- all mean the same thing but reflect the different perspectives of each model

Example of inconsistency

Modelling of “Name”

FRBR an attribute of several entities, e.g. *person*

FRAD its own entity, e.g. relationship with entity *person*

FRSAD part of the broader entity “nomen”

FRBR-LRM

- project of the IFLA FRBR Review Group since 2010
- model definition by the Consolidation Editorial Group (CEG created in 2013)


CEG members:

- Pat Riva (Canada) (chair)
 - Patrick Le Bœuf (France)
 - Maja Žumer (Slovenia)
- world-wide review until May 1st, 2016
<http://www.ifla.org/node/10280>

Impact on RDA?

- will cause us to adjust our understanding of bibliographic data
 - but* not a radical rupture → continuity
- RDA will be aligned with a single logically consistent model – avoid problems during future development work
- RSC very aware of FRBR-LRM developments
 - formal protocol between RSC and FRBR Review Group

RDA continues to evolve

- RDA has changed since 2010
 will keep changing
- logical, comprehensive, and extensible
- able to change in response to the environment in which it is being applied:
 - technology
 - expanding global interest and use
 - maintaining alignment with changing international standards