RDA and MARC 21 Development

Update on MARC/RDA Working Group

RDA in Europe Day,

14th September, 2021

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Overview

MARC RDA Working Group:
- Charge
- Schedule
- Membership
- Focus
- Progress since May 2021
- Ongoing Work
- Wider Community Engagement
- Learning points
MARC RDA Working Group (Charge)

• Evaluate the scope and impact of the extensions to RDA arising from the RDA 2019 revision in relation to MARC 21

• Identify and prioritize possible changes to MARC 21 to support compatibility with the RDA extensions and ensure effective data exchange into the future

• Prepare discussion papers and proposals for the MARC Advisory Committee
MARC RDA Working Group (Schedule 1)

- **December 2019**: Preparation of initial discussion papers.
- **January 2020**: ALA Midwinter meeting, where discussion papers will be considered.
- **January – April 2020**: Working group meetings.
- **April – June 2020**: Preparation of proposals and discussion papers.
- **June 2020**: ALA Annual meeting; consideration of proposals and discussion papers.
- **July – October 2020**: Working group meetings.
- **November – December 2020**: Preparation of remaining proposals.
- **January 2021**: ALA Midwinter meeting; consideration of proposals.
MARC RDA Working Group (Schedule 2)

- **February – April 2021**: Working group meetings.
- **April – June 2021**: Preparation of proposals and discussion papers.
- **June 2021**: MAC Annual meeting; consideration of proposals and discussion papers.
- **August – October 2021**: Working group meetings.
- **November – December 2021**: preparation of remaining proposals.
- **January 2022**: MAC Midwinter meeting; consideration of proposals.
MARC RDA Working Group (Membership 1)

RSC

Ebe Kartus – University of New England, New South Wales, Australia (RSC Wider Community Engagement Officer)

Charlene Chou – New York University, Division of Libraries, New York (RSC Wider Community Engagement Officer-Elect)

NDMSO

Sally McCallum – NDMSO Chief, Library of Congress
MARC RDA Working Group (Membership 2)

MARC Steering Group

Thurstan Young – British Library

John Zagas – Library of Congress

Reinhold Heuvelmann – Deutsche Nationalbibliothek

Bill Leonard – Library and Archives Canada

Hong Cui – Library and Archives Canada
MARC RDA Working Group (Membership 3)

Vendors

Wayne Schneider – Indexdata

Jay Weitz - OCLC
MARC RDA Working Group (Membership 4)

Specialists

Catherine Gerhart – Audiovisual specialist (MAC Chair)

Susan Moore – Cartographic specialist (MAGIRT rep to MAC)

Karen Peters – Music specialist (MLA rep to MAC)

Tina Shrader – Serials specialist

Kalan Knudson Davis – Rare books and manuscripts specialist
MARC RDA Working Group (Focus)

- New RDA entities, concepts and vocabularies encoding schemes
- Choice of format to implement change
- Granularity and consistency of change
- Feasibility and utility of change
New RDA Entities

- RDA Entity
- Nomen
- Agent
- Collective Agent
- Place
- Timespan
New RDA Concepts

- Manifestation Statements
- Representative Expressions
- Diachronic Works
- Data Provenance
New RDA Vocabulary Encoding Schemes

• RDA Carrier Extent Unit
• RDA Extension Plan
• RDA Recording Sources
• RDA Type of Binding
Existing RDA Vocabulary Encoding Schemes

- RDA Mode of Issuance
- RDA Aspect Ratio Designation
- RDA Illustrative Content
- RDA Sound Content
- RDA Form of Musical Notation
Choice of Format in MARC 21

• Authority?

• Bibliographic?

• Other?
Granularity and Consistency in MARC 21

• Scope for granularity of coding:
  • record level?
  • field level?

• Scope for consistency of coding:
  • equivalent field by field?
  • equivalent format by format?
Feasibility and Utility in MARC 21

• Possibility of change within :
  • format constraints? (i.e. available coding)
  • existing record models? (e.g. NACO, BIBCO, PN)

• Helpfulness of change to :
  • end users? (e.g. researchers, programmers, etc.)
  • collection management? (e.g. inventory control, workflow efficiency, etc.)
MARC RDA Working Group (Progress 1)

- MARC Update 31 (December 2020)
  - Manifestation Statements: Field 881 (Bibliographic format)
  - Extension Plan: Field 335 (Bibliographic and Authority formats)
- MARC Update 32 (June 2021)
  - Mode of Issuance: Field 334 (Bibliographic format)
MARC RDA Working Group (Progress 2)

- MARC Update 33 (December 2021)
  - Type of Binding: Field 340 $l (Bibliographic format)
Extension Plan (335) Examples

335 $a$ static plan $2$ rdaep

335 $a$ successive indeterminate plan $2$ rdaep

335 $a$ successive determinate plan $2$ rdaep

335 $a$ integrating indeterminate plan $2$ rdaep

335 $a$ integrating determinate plan $2$ rdaep
Mode of Issuance (334) Examples

334  $a$ single unit $2$ rdami

334  $a$ multiple unit $2$ rdami
Type of binding (340 $l) Examples

340 $l case binding $2 rdatb*

340 $l perfect binding $2 rdatb*

340 $l closed ring binding $2 rdatb*

340 $l open ring binding $2 rdatb*

340 $l spiral binding $2 rdatb*
Ongoing Work (1)

• Discussed by MAC 2020 / 2021: Data Provenance
  • Expansion of field 883 (Metadata Provenance)?
  • Definition of non-standard subfield (e.g. $\_\_\_\_\_\_\_\_\_)$?
  • Definition of subfield $7$ or other subfield (where $7$ is unavailable)?
  • MAC Preference: Subfield $7$ or other (where $7$ is unavailable) and code lists
Ongoing Work (2)

• Discussed by MAC 2021 : Representative Expressions
  • Additional expression coding in authority format?
  • Add field 075 (Type of Entity) to bibliographic format?
  • Expand field 381 (Other Distinguishing Characteristics of Work or Expression)?
  • New field 387 (Representative Expressions)
  • New indicator values in existing fields which carry expression data?
  • A combination of one or more approaches listed above?

• MAC preference : New field with exception for 382 (Medium of performance) in which new indicator values should be defined.
Ongoing Work (3)

- MARC Advisory Committee Summer 2021: Scale
  - Amend definition of field 507 (Scale Note for Graphic Material) to align with RDA definition of “scale”?
  - MAC preference: 507 definition will be amended.
Wider Community Engagement (Progress 1)

- MARC Update 31 (December 2020)
  - Aspect Ratio Designation : 345 $d (Bibliographic format)
  - Illustrative Content : 340 $p (Bibliographic format)
- MARC Update 32 (June 2021)
  - Sound Content : 344 $i (Bibliographic format)
  - Form of Musical Notation : 348 $c (Bibliographic format)
Aspect Ratio Designation (345 $d) Examples

345 $d full screen $2 rdaar

345 $d wide screen $2 rdaar

345 $d mixed aspect ratio $2 rdaar
Illustrative Content (340 $p) Examples

340 $p illustration $2 rdaill

340 $p portrait $2 rdaill

345 $p map $2 rdaill
Sound Content (344 $i) Examples

344 $i silent $2 rdasco

344 $i sound $2 rdasco
Form of Musical Notation (348 $c$) Examples

348 $c$ score $2$ rdafmn

348 $c$ staff notation $2$ rdafmn
Learning Points (1)

- New coding not mandatory to implementation of RDA
- RSC liaison to provide advice and assistance
- Feedback from MAC may contribute to RDA developments
- RDA will not adapt to MARC 21 record structures if these break its relationships to the LRM
Learning Points (2)

- Structural change vs Minimal disruption
- Closed vs Open world application
- RDA constraints vs Community preference
- Coding in principle vs Implementation in practice
- Legacy requirement vs anticipated benefit
Thank you!

Thurstan Young

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