To: ALA/ALCTS/CCS Committee on Cataloging: Description and Access

From: Task Force on CC:DA's Internal and External Communication

Re: Preliminary Report

Introduction

The Task Force on CC:DA's Internal and External Communication is charged with:

A. Reviewing the work of the relevant past task forces, the <u>Task Force on Communication and Outreach</u> (operating 1994-1995) and the <u>Task Force to Investigate CC:DA's Web Presence</u> (operating 2004).
B. Assessing the nature and content of CC:DA's external communications and making recommendations for updating current documents or drafting new documents.
C. Assessing the nature of CC:DA's internal communication requirements.
D. Determining the functional requirements for software applications to handle internal and external communication.
E. Evaluating the nature and content of documents posted on the CC:DA website, investigating alternative methods for communicating this information and/or alternative methods for preparing and posting documents on the website.
F. Evaluating and recommending mechanisms for migrating and maintaining CC:DA's website and its communication functions to an ALA-hosted application, including looking at the duties of the Webmaster and how they can be folded into the CC:DA organizational structure.

The Task Force notes the difficulty of separating charges C-F as web pages and web-based services integrate all aspects of CC:DA's communication.

Charge A: Reviewing relevant prior work

The Task Force established a wiki space at <u>http://wikis.ala.org/ccda/index.php/CommTF</u> for discussing the prior Task Force reports and has completed its initial review. The 1994/5 Task Force focused on external communication. The 1994/5 Task Force members created a distribution list of relevant external stakeholders to whom CC:DA communications should be addressed. The 1994/5 Task Force also created two documents for external distribution. The first document, CC:DA/TF/Communication and Outreach/6/rev. *Building International Database and Cataloging Standards in Cooperation with American, Australian, British and Canadian Partners: The American Library Association (ALA) and the Committee on Cataloging: Description and Access (CC:DA)* describes CC:DA's mandate and working process. The second document, *CC:DA/TF/Communication and Outreach/7/rev. How to Submit a Rule Change Proposal to CC:DA*, provides instructions on contributing to the AACR2 editorial revision process.

The 1995 Task Force report and associated documents are twelve years old and significantly dated. The "Building International …" document was a printed brochure (with an online version) published by ALCTS and designed as a one-stop-shop to educate catalogers in the United States about CC:DA. It was also meant to serve as an invitation to the non-librarian

community to collaborate with CC:DA. The document is centered on AACR2 and its editorial process. Obviously, any references to AACR2 need to be updated to reflect the change to RDA.

Prior to undertaking any revisions, the current Task Force on Internal and External Communication recommends reviewing the audience and objectives of CC:DA/TF/Communication and Outreach/6/rev. We question the ability of one brochure to serve both the cataloger and non-librarian communities. It may also be necessary to determine if there is still interest in a printed brochure. CC:DA may be better served by an electronically distributed document, given the expense of printing pamphlets.

The "How to Submit a Rule Change …" document is also an artifact of the AACR2 era, dealing with it exclusively. An equivalent set of instructions will be necessary when RDA is published. The current Task Force recommends postponing any revisions to "How to Submit a Rule Change …" until the RDA is almost ready for publication. CC:DA should work with the JSC to inform catalogers in the United States about the new process for making changes to the RDA.

The 2004 Task Force report on CC:DA's web presence remains up-to-date. The current Task Force on Communication finds the 2004 assessment of CC:DA internal and external communication to be accurate. The functional requirements listed for the web site also continue to hold true. There is a need, however, for additional functional requirements to reflect the changing nature of web-based communication and CC:DA's growing reliance on social software to do its work (ex. the CC:DA wiki).

Charge B: Assess nature of external communications

External communication is accomplished via the CC:DA web presence and announcements sent to the distribution list mentioned above. In addition, CC:DA will be creating a public email list to further propagate information about the committee's work.

CC:DA's external communication falls into three general areas: (a) information about the committee scope and charge; (b) information about international cataloging standards and CC:DA's role in their creation and revision; and (c) news of CC:DA's current activities. The web site also has a set of archived documents, which serve a record-keeping function and may be of use to external stakeholders.

Charge C: Assess nature of internal communications

The majority of CC:DA's internal communication occurs via the committee's email list. All committee members are subscribed. The committee receives documents for review and discussion via the JSC, international standards bodies such as NISO, and other librarian groups. The chair makes these documents available via the web and announces the availability through the email list with a timeframe for discussion and action. Motions and voting are done via list between face-to-face meetings at ALA Midwinter and Annual conferences.   The nature of CC:DA's internal communication has evolved in the last few years to include more direct contact with the working documents. CC:DA is now using wiki technology to collocate committee member's comments and discussion on working

documents. The email list is closed to the public due to technical considerations — it is not possible to give non-committee member's read-only access to the list. CC:DA does want to make its business transparent and to that end will be establishing a public email list for this purpose.

The current methods of internal communication are working well. The goal of internal communication is to carry on the business of the committee and CC:DA continues to get the work done via email and wiki/web. The work of discussing and editing documents, however, is time consuming. Volunteers must make the effort to add documents to the wiki, an exercise in cutting and pasting text from one format to another. Volunteers must also review the wiki space once discussion ends in order to collect the comments and summarize the issues and proposed solutions. In addition, the wiki environment does not allow concurrent commenting/editing leading to a small risk of committee members over-writing the work of others.

The current Task Force on Communication is reviewing emerging technologies to determine if any of the work mentioned above can be automated. Tools such as PleaseReview (www.pleasereview.com), for example, automatically create Word documents with all the comments and changes at the end of the collaboration period.

Charge D: Determine functional requirements for software

The current Task Force has postponed working on this charge until it can complete evaluation of the full nature of CC:DA's internal and external communication.

Charge E: Assess nature of website documents

The CC:DA traditional web space continues to be split between servers at ALA and at Penn State University (PSU) Library. CC:DA has additional web space for wikis. An archive of older wiki documents is hosted at the University of California, Santa Barbara and current working documents are discussed via the ALA wiki. This does not pose any inconvenience to those using the web sites due to the seamless nature of web linking. It does pose an administrative problem. The site at PSU is only accessible to the current web master and long term support from PSU is undetermined. CC:DA no longer has active members working at UCSB and the ongoing support for that server space is also unclear.

Documents on the web sites serve both internal and external communication purposes. They are available in multiple formats including HTML, PDF, and DOC. Multiple formats can mean an increased risk for error due to multiple points of maintenance. CC:DA documents are manually indexed by subject. A document or content management system may automate the indexing, thus lessening the work of the CC:DA web master.

Wherever possible documents are interlinked.   The web site also provides external links to related sites such as the JSC and Library of Congress whenever necessary. According to Google Web Master Tools, the Google search engine indexes 691 pages on the PSU site.

Charge F: Migrating and maintaining CC:DA's website

The CC:DA web master cannot continue in this role due to the workload of becoming ALA's representative to the JSC.   The current task force recommends that CC:DA appoint a new web master to be responsible for the migration of the CC:DA's various web sites to ALA servers and the ongoing maintenance of the new web site. This position should be formalized with the creation of an additional position within the membership of CC:DA due to the large amount of work required. The RDA publication process has created a large volume of documents for the web master to manage. In addition, the migration process itself is a large task. There is some question as to what degree of formal record keeping is necessary for CC:DA's web documents and the degree of long-term preservation required and this also has workload implications for the web master. It seems probable that the workload will not diminish over time given the constant evolution of web technologies and the increasing number of non-traditional cataloging/metadata communities with which CC:DA must interact.