

To: ALA/ALCTS/CCS Committee on Cataloging: Description and Access
From: Task Force to Investigate CC:DA's Web Presence
RE: Report

The Task Force to Investigate CC:DA's Web Presence is charged with:

- ✓ investigating how the CC:DA Website is used for internal and external communication;
- ✓ developing a statement of functional requirements for the Website; and
- ✓ recommending means for carrying on the duties currently undertaken by the CC:DA Webmaster

**Charge A: Internal and external communication:
investigating how the CC:DA Website is used
for internal and external communication**

The Website is currently in two different places, with a single page on the ALA server and the rest of the pages on the Penn State server. This seems to have occurred because of the need of CC:DA to have speedy access to documents, and because it was not possible to arrange training on the new ALA Content Management System. It is in the long term possibly a temporary situation and – given the seamless nature of the entire WWW – can be ignored.

The intentions of the current design of the site, in terms of expected uses for internal and external communication, are:

External communication:

The site is to be used to post basic information about the Committee, its current work, and the development of AACR in general.

- a. The basic information about the Committee that is of general external interest is presented in the scope statement (on the home page), the charge, and the roster.
- b. The AACR2 revision process, and CC:DA's role in it, are explained in two very significant documents -- both of them listed prominently on the home page:

“Building International Descriptive Cataloging Standards ...”
and “How to submit a rule change proposal ...”

- c. The wider AACR context is covered in the documents previously mentioned, but there are also links on the site to the Joint Steering Committee for the Revision of AACR (JSC) Web site, and to some key background documents (the “Anglo-American Cataloguing Rules” section below the announcements box).
- d. The current activities of the committee are highlighted in the Announcements box, where important current information appears. Announcements include: agendas and reports from CC:DA meetings at ALA; announcements and reports on JSC meetings; lists of new Task Forces formed, with a brief version of the charge of each; and other relevant announcements. These announcements and the pages they link inform visitors to the site about what CC:DA is working on, and (in the case of Task Forces) who is doing the work.
- e. Although many of the pages related to external communication are not currently housed on the ALA server, all of them can be accessed **through** the page on the ALA server – they are linked either directly (one click) or at most one level down (two clicks). All of the links on the page on the ALA server point either to pages on the Penn State server or to external pages (such as the JSC site or the IFLA site).

Internal communication:

The CC:DA website primarily serves as a tool for internal communication, and for managing the CC:DA workload. In as far as possible, everything is interlinked.

New documents come to the Webmaster in various forms. The Webmaster distributes an edited version of any CC:DA document (not including JSC documents) to the CC:DA mailing list, almost always both as an email attachment (generally as a Microsoft Word document), and with a link to the document on the website.

The Webmaster posts documents in HTML, Word or PDF formats – and usually some combination of these. Almost all documents are posted at least in PDF format. Document lists, agendas, task force pages are usually in HTML format, to facilitate hyperlinking.

Individual documents are included in one or more of various document lists: meeting agenda, report lists, task force lists, or the “other documents” list. Most of these lists separate active and inactive/archived documents; active documents are usually listed in reverse chronological order. There are two document indexes: an alphabetical index and a document number index.

One particular document has become a critical part of the internal communication process. The CC:DA Program of Work is a master document for managing the CC:DA workload. It is arranged by deadline dates and tracks progress towards completion of each task. The Chair, TF chairs, and CC:DA participants in general can use it to see what work has been scheduled. The chair also uses it to compile the agenda for each CC:DA

meeting, as well as for managing CC:DA discussions and votes. The Program refers to and links to both CC:DA and JSC documents; the latter requires a password and can only be seen by CC:DA participants.

The major activities involved in maintaining the internal communication features of the site involve either posting of new documents or changing the status of documents from active to inactive when work has been completed.

Evaluation of current webpages:

Generally speaking, the pages on, or linked through, the ALA server are meant to serve the function of external communication, while the PSU pages and links are more for internal communication. The PSU pages provide a way for archiving and for making available the materials the Committee needs to conduct its discussions. CC:DA members find the PSU Website to be extremely well organized and always very timely in its posting of new documents. In the weeks (and months) when CC:DA is working on documents for JSC and is under tight timelines, committee members use the PSU site several times a day.

One option mentioned by a Task Force member is that the PSU pages function as well as – or better than – the ALA page for a public web presence for the Committee. The PSU pages already do (or easily could) cover the same information presented on the ALA page, and in a more readable and functional way. The major alternative seems to be to continue on with the relatively seldom changing basic CC:DA documents being on the ALA page and the documents for everyday CC:DA current work on the PSU site; it would require extensive ALCTS staff time to maintain the PSU site – on the order of 20-30 hours per week during high-effort times.

This raises the question of whether a single site under the purview of the Committee may effectively combine both internal and external communication functions. It would be necessary to visually, and possibly structurally, organize the site to keep the details of the internal work from cluttering up a page to which we could also refer the public for general information, but this might be possible. The alternative would be to continue with two separate sites, one with the relatively seldom changing basic CC:DA documents on the ALA server, and another with the documents for everyday CC:DA current work on the PSU site. In either case, extensive ALCTS staff time would be required to maintain the PSU site – on the order of 20-30 hours per week during high-effort times.

**Charge B: Functional requirements:
developing a statement of functional requirements for the Website**

The CC:DA Website(s) must:

- ✓ serve both the general (cataloging) public and the communication needs of the committee itself
- ✓ provide an introduction/overview of the work of the committee and how it fits in to the broader AACR development community
- ✓ provide current lists of committee members (roster)
- ✓ provide current lists of task forces, their charges, and their members
- ✓ provide information on current activities via announcements, minutes, current proposals, etc.
- ✓ provide access to documentation of committee rules, practices, and procedures
- ✓ provide access to current committee documents
- ✓ provide access to relevant non-committee documents (e.g. JSC, NISO, IFLA, password-protected if necessary)
- ✓ provide links to relevant other related organizations, committees, etc.
- ✓ be kept current, updated as new documents become available, etc.
- ✓ provide access to historical documents of the committee; serve as an archival repository for committee documents; previous members, minutes, committee and task force documents, etc.
- ✓ maintain a stable structure – e.g., addresses of documents should be stable
- ✓ provide index to documents by topic, rule number, document number, title, issuing body
- ✓ link to archived messages from the electronic discussion list to current committee members

Charge C: Recommending means for carrying on the duties currently all performed by the CC:DA Webmaster

Recommendations:

1. Insofar as possible, have each of the CC:DA interns do some of the Web work. Except where it is quicker for the Webmaster to do the work rather than to explain how to do it, or where there must for practical reasons be just one person doing the work, it would work well to have a person other than the Webmaster perform many routine tasks.
2. The committee can experiment with groupware (such as Confluence) that allows each committee member to comment on a document within the document, thus saving large amounts of JSC representative, Chair and Webmaster time to compile responses. It seems possible that at some point this sort of software might cut down on the amount of CC:DA work that has to be done by the webmaster. The Chair arranged to have a Confluence page for CC:DA – account- and password-protected – set up on her library's servers in September 2004; this software was used by several members to formulate comments on a document in October, and will be used in compiling the comments on the draft Part 1 of AACR3 in January-February 2005. ALA currently has an RFP out for this sort of software for ALA as a whole, with late October as a preferred time to have a selected software ready for testing.
3. The Task Force suggests that, in case ALA purchases document-sharing software to be used Association-wide that requires extensive training to be used, it is appropriate for ALA to cover travel and per-diem costs for ALCTS (and other Section) Committee members to obtain such training.

Some personal thoughts from the Webmaster, for consideration

The work of the Webmaster has gone far beyond maintenance of the CC:DA website. The task has become that of a professional secretariat for ALA's participation in the rule revision effort and other committee activities. The standards of document preparation that have evolved are very high, and that in itself makes it difficult for others – particularly inexperienced interns – to contribute in a significant way.

Perhaps CC:DA needs to decide whether this high standard of document design and content is worth the effort it takes to achieve. At the moment, ALA's documents are (in my opinion) significantly superior to those of any of the other constituencies. Yet the JSC secretary expends no more effort in preparing those documents for posting than she does the ALA documents. This suggests that superior document design is not an absolute requirement. Perhaps CC:DA doesn't need to expend the current level of effort. This

will be particularly true once everyone has become accustomed to using the AACR infobase as the source of rule text for revision proposals. CC:DA deserves the highest quality documents and something needs to be done to make this possible. However, I do recognize that this may be the most difficult aspect of the problem.

While the standards for document quality are negotiable, timeliness is not. We need to have immediate access to resources for editing and posting working documents. Any solution that does not make a commitment of such resources to the task will not be adequate.