

MARC 21 Support System

**International Workshop: MARC 21 – Experiences, Challenges, and
Visions -- May 2007**

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Evolution

❖ Initial Development period 1966-72

▪ Collaborative

- Computer specialist(s)
- Librarians
- ~15 pilot participants
- International discussions
- ANSI standard Z39.2
- ISO standard 2709

Maintenance Roles

Maintenance roles

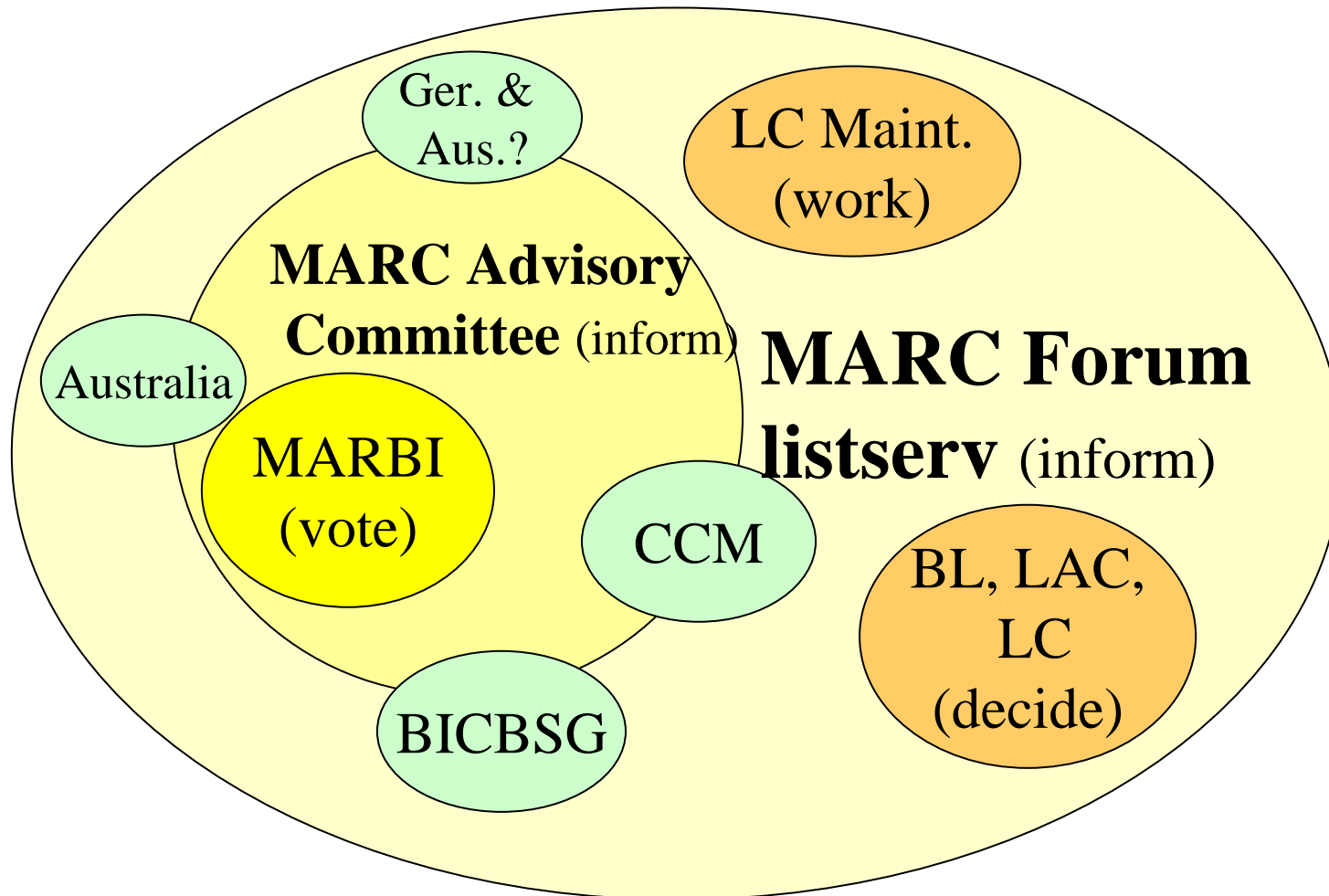
- ❖ **Maintenance structure evolved from 1973 with the goal to be:**
 - **Wide**
 - **Thorough**
 - **Open**

- ❖ **Components:**
 - **Maintenance agency and partners**
 - **Experts**
 - **User community**

Maintenance roles

- ❖ **Desirable attributes of input groups:**
 - **Serious, responsible participation**
 - **Diversity of input**
 - **Continuity of participation**
 - **Stability of participation**
 - **Ability to listen**

Taxonomy of maintenance input groups



Maintenance roles

❖ MARC Forum listserv

- Open listserv
- Questions, in addition to commenting on Discussion Papers and Proposals

❖ MARC Advisory Committee

- National Libraries – LC, LAC, BL, NLA, NLM, NAL
- Media representatives – maps, audiovisual material, music, visual resources, etc.
- Types – rare books, archives, law, public, etc.
- Networks and systems – OCLC, MicroLIF (small systems), AVIAC (large systems), etc.
- Cataloging, serials, subject analysis

Maintenance roles

❖ MARBI

- **Formal with American Library Association**
 - MARBI (Machine Readable Bibliographic Information Committee)
- **3 representatives from each of cataloging, IT, and reference divisions of ALA**
- **2+2 year terms**
- **Rotating chair**

Maintenance roles

- ❖ **CCM (Canadian Committee on MARC)**
 - **Advisory to the Canadian Library Association and the Libraries and Archives Canada**
- ❖ **BICBSG (Book Industry Communications Bibliographic Standards Group)**
 - **Advisory to the British Library**
- ❖ . . .

Maintenance roles

❖ LC maintenance responsibilities

- Maintain English documentation
- Maintain web site, listserv, etc.
- Draft or revise Proposals and Discussion Papers
- Answer questions
- Development

❖ LAC maintenance responsibilities

- French translation

❖ BL, LAC, LC

- Review all papers before distribution
- Final approval for all proposals

Maintenance Process

Maintenance goals

- **Minimize duplicative encoding – Is this already accommodated in the format?**
- **Maximize consistent use of encoding – Are there other fields with similar data to use as a guide?**
- **Consider impact on implementations – Is this a structure that is difficult for known system architectures to handle?**
- **Assure detail needed – Does this content designator have a real end user purpose?**
- **Consideration for change costs – Is it one time or continuing cost? Effects retrospective records? Impacts local systems? Network systems?**

Maintenance process

❖ Change proposal

- **Web site form**
 - Describe change
 - Impact questions
 - Will adoption be optional?
 - Impact studies available?
 - Who impacted?
 - Expected costs?
 - Types of costs?
 - Retrospective implications?
- **Submitted by any responsible party, but usually through the National Library**

Process

❖ Discussion Paper stage

- Discuss, clarify, review draft
- Internal reviews by LAC, BL, LC to get different viewpoints
- Draft edited by LC to bring together and bring in past considerations
- Publish on web and discussed at MARBI, on MARC Forum listserv, in specialized groups, etc.
- Consensus to: proceed to proposal?
withdrawn by submitter? new discussion paper? straw vote?

Process

❖ Proposal stage

- Informed by Discussion Paper review
- May have options that broaden, narrow, offer different configurations, etc.
- Publish on web and discuss at MARBI and in other groups
- Global opportunity to comment via MARC Forum listserv
- MARBI votes during meeting held in the context of MARC Advisory Committee

Process – decision

- ❖ **LC, BL, LAC review vote, discussion, special issues, then decide**
- ❖ **Do they ever differ from the MARBI vote? Very seldom because there has been broad and careful consideration – even when they might prefer different outcome**
- ❖ **If do not concur with MARBI, then take proposed change back as a Proposal or a Discussion Paper**

Post process

- ❖ **Publish decision on web site**
- ❖ **Publish format update**
 - **Updates are annual**
 - **Formats for English language version:**
 - **Full format update – print and online**
 - **Concise format – online and print**
 - **Marked change version for translators**
 - **Lite format – online**
 - **Field list – online**
 - **Updates are now free online in PDF, in addition to the print which is still sold**

Implementation guidelines

- ❖ Advise not to implement until 3 months after publication of the English language version
- ❖ “Publication” has been pegged to the printed Full
 - Consideration is being given to changing that to the online Full or the online Concise

Musing on changes

- ❖ **Too much or too costly change will wreck the standard's foundation for interchange**
 - Many implementers will be left behind
- ❖ **Changes need to be independent of specific system architectures**
- ❖ **But should take some note of the large systems that are essential to our cost savings and sharing**
- ❖ **Changes need to take into account the billion records already out there**
 - Inconsistency in coding across time affects search and retrieval

Musing on changes

- ❖ **The location of the change can make a big difference in reaction**
- ❖ **Significant change events**
 - **Redevelopment of “Computer Files” in late 1980s**
 - **Format integration and simplification in 1988**
 - **Implementation delayed until 1992**
 - **Moratorium on character set changes in 1992; Unicode implementation**
 - **Harmonization**
 - **CanMARC in 1996**
 - **UKMARC in 2002**
 - **MAB in 2007?**

More to maintenance

❖ Other maintenance tasks

- MARCXML and MODS to enable MARC 21 in the XML environment
- Mapping of MARC Bibliographic and Holdings data elements to the Functional Requirements for Bibliographic Records (FRBR)
- Numerous transformations from and to MARC relating to Dublin Core, MODS, ONIX, etc.
- Code lists – organizations, countries, languages, geographic areas, relators, sources
- Tool lists

More to maintenance

❖ MARC 21 and cataloging rules

- MARC for multiple rules from the beginning
- Format is agnostic - but highly accommodating to various Anglo-American rules and IFLA developments (ISBDs)
- All of the AACR2 community use MARC 21

❖ What to expect with RDA?

- Content/carrier distinctions - GMD and SMD?
- Other? (Ask Alan Danskin)

Thank you!

❖ Questions?