To: Cheri A. Folkner, chair
         ALA/ALCTS/CCS Committee on Cataloging: Description and Access (CC:DA)

From: Kevin M. Randall, chair
         CC:DA Task Force to Maintain the CC:DA Publication "Differences Between,
         Changes Within"

Re: Final Report of Task Force

After ALA Midwinter 2004, CC:DA appointed the Task Force to Maintain the CC:DA
Publication "Differences Between, Changes Within". The charge is stated on the task force web
page as:

> The Task Force to Maintain the CC:DA Publication "Differences Between, Changes
> Within," is charged with maintaining this publication, keeping it in conformance with the
> current version of AACR.

> The Task Force is also charged with informing CC:DA of any changes proposed to the
> publication, by means of 6-month reports containing those proposed changes, to be presented
> at Midwinter and Annual meetings of CC:DA.

> Finally, since this is CC:DA's only task force that is maintaining a publication, the Task
> Force is charged with informing CC:DA of the appropriateness of having a task force
> maintain a publication.

> The Task Force will have a working life extending through July of 2006. [Note: Worklife
> extended from two years, which would have been through March 2006, to January 2007, at
> request of Task Force chair.]

The task force was constituted in March 2004 with the following members:

Everett Allgood, New York University
Jean P. Altschuler, Arnold & Porter
Lynnette M. Fields, Lewis & Clark Library System
Judith A. Kuhagen, Library of Congress
Rhonda K. Lawrence, University of California, Los Angeles
John Radencich, Florida International University
Kevin M. Randall, Northwestern University
Keith R. Trimmer, University of Southern California
Cynthia Whitacre, OCLC
Mary Woodley, California State University, Northridge

Work of the Task Force

The Task Force began its work in October 2004 with the appointment of Kevin M. Randall as chair. Meetings were held at Midwinter 2005 in Boston and Annual 2005 in Chicago, but most Task Force work was done by email communication.

At the outset, the Task Force discovered that its work would be more complicated than had been anticipated. Aside from some early uncertainty in determining the actual "final" manuscript that was approved for publication, there were three significant factors:

1) The print version and the PDF version of the published book are not identical. The print version has a layout format that has each page of text facing a blank page for "Notes". The PDF version has no such blank "Notes" pages. Because of the blank pages in the print version, the page numbering in the two versions was out of synch and caused some initial communication problems among Task Force members. There were also other, comparatively minor formatting differences between the versions.

2) There were differences between the final manuscript and the published document. Some of these appeared to be conscious editorial changes, but most were obvious errors, in either text or formatting.

3) The Task Force was able to work with the published document in only print and PDF formats. The electronic file used by ALCTS for producing the print and PDF could not be used by the Task Force. This would complicate the processes of determining the changes needing to be made and communicating those changes to ALCTS.

Because there were several changes needing to be made both (1) to update the guidelines and rule references to reflect the most current state of AACR2 and (2) to correct errors, the Task Force decided to look for other areas that might need improvement or clarification. An announcement was sent to several professional email discussion lists, advertising the availability of the publication and soliciting information on how it was being used and what improvements might be made. The announcement elicited few responses, which was a cause of concern to the Task Force: how widely was the book being used, and was it worth doing an update in light of the announced target publication date of a new cataloging code? However, the ALCTS office indicated that the publication was considered successful; that fact, along with the uncertainty over the actual publication and implementation dates of a new cataloging code and the need to make *Differences Between, Changes Within* useful during the remaining working lifetime of AACR2, allayed that concern.

The Task Force identified the following classes of changes to be made:

1) Changes in guidelines resulting from revisions to AACR2 and/or LCRIs
  (including changes to names of ISBD areas and elements; Area 3 discontinued for electronic resources; Area 5 optional for remote electronic resources; other title information not mandatory for all integrating resources; changes to criteria for determining major/minor changes in title; determining changes in edition information for integrating resources)

2) Changes in rule number references resulting from revisions to AACR2

3) Corrections to errors contained in the original manuscript

4) Corrections to errors introduced in the publication process
(including using uppercase instead of lowercase alpha characters in the third element of section numbers, e.g. "A3A" instead of "A3a"; using uppercase instead of lowercase alpha characters in some AACR2 rule numbers; wrong formatting on section or paragraph headings; wrong data in tables)

5) Changes in formatting to make the document easier to read and understand
(including changing the symbols used as bullets; using darker and more distinct symbols in the tables)

Working via email and Microsoft Word attachments, the Task Force agreed on a set of changes. After discussion with ALCTS Publishing, it was decided to document the changes in two ways: the printed book was marked up in ink, and a detailed listing of all changes (referencing page numbers, paragraphs, bullets, etc.) was put into a Word document. The chair delivered the changes to ALCTS in May 2006, at which time options were discussed (such as how to reformat to ensure identical pages in print and PDF versions, and how to deliver the revised draft for proofreading). It was originally estimated that the revised draft would be ready within a few weeks (before ALA Annual 2006), but delays at first pushed the estimated date back to July, and a preliminary version of the revised draft was sent to the chair on Dec. 11, 2006, with the complete revised draft sent on Jan. 9, 2007. The Task Force has already identified corrections that need to be made to the revised draft, including correcting errors introduced at ALCTS during production of the draft.

Members of the Task Force have been frustrated throughout the process of revisiting/revising *Differences Between, Changes Within*. One of the charges for the Task Force was to advise CC:DA regarding the appropriateness of having a task force maintain a publication. While the going has been difficult, it is the sense of the Task Force that such a function was indeed appropriate. The major difficulties arose from working with ALCTS, where it appeared that perhaps the staffing level was working against this project, and from making very detailed changes through a process inherently prone to error. While maintaining such a publication is appropriate, perhaps using ALCTS Publishing is not so appropriate. The Task Force suggests that CC:DA consider self-publishing future documents as freely-available PDF files on its own web site, and maintaining the publication "masters" in a widely-used format such as Microsoft Word. While this would no longer generate a revenue stream for ALCTS, it is doubtful that the loss of revenue would be so great as to outweigh the benefits of better control over the documents by CC:DA and more timely publication.

A suggestion had been made to consider inclusion of *Differences Between, Changes Within* in the Library of Congress online publication *Cataloger's Desktop*. Preliminary inquiries have indicated interest on the part of Library of Congress, but this would require negotiation with ALCTS, which is beyond the charge of the Task Force.

Recommendations

1) CC:DA should request that ALCTS Publishing and Library of Congress Cataloging Distribution Service negotiate to include *Differences Between, Changes Within* in the Library of Congress online publication *Cataloger's Desktop*.

2) CC:DA should continue to appoint task forces to create/maintain publications that are of interest and high importance to catalogers and would not be created by others (e.g., rule-making bodies such as the Joint Steering Committee). However, this recommendation is dependent upon the following two recommendations.

3) Publications emanating from CC:DA should be self-published by CC:DA under a Creative Commons license, and made freely available in PDF format on the CC:DA web site.

4) If documents cannot be self-published by CC:DA, there must be a clear plan in place for working with ALCTS on editing and proofreading, to ensure accurate and timely publication (and revisions, when appropriate). The "official master" of the text should be in a file format that is widely used by working librarians and can be edited directly by the author(s)/task force (e.g., Microsoft Word). There should be no need for special typesetting capabilities not afforded by the file format chosen.

Future of the Task Force

The working life of the Task Force is scheduled to end in January 2007. The Task Force having already agreed upon changes to the original publication, the only work remaining at this date is careful proofreading of the draft, submission of further corrections based on the original list of changes, proofreading the corrected revision, etc. until final publication. This is certain to extend past the working life of the Task Force proper, and would require the work of only a few people. The chair requests that CC:DA take the appropriate action to continue, by either extending the Task Force (or a portion thereof), appointing a new ad hoc group or task force, or whatever other action it deems appropriate.