

To: Joint Steering Committee for Revision of AACR

From: Deirdre Kiorgaard, Chair, JSC

Subject: **RDA Examples Groups: Terms of Reference**

Background

JSC decided at its October 2004 meeting that all the examples which currently illustrate rules in AACR2 should be reviewed and reassessed for Resource Description and Access (RDA). Existing examples should be reviewed for currency, appropriateness, relevance, necessity and accuracy. New examples may be required in some cases. JSC decided to establish a working group to undertake this work on its behalf.

At the April 2006 meeting it was decided that two working groups would need to be assigned to this task: one group to review the examples for Part A, Chapters 1-5, and a second group to review those for Part A, Chapters 6-7 and Part B.

As at October 2007, both groups have made substantial progress in contributing new or changed examples for RDA, and in removing out of date or unnecessary examples. In the course of their work the groups have sought additional guidance on particular issues. In addition, the move to a new structure for RDA has necessitated some changes to their work. This revised charge has been developed to address both of these matters.

Membership and timeframes

- **Membership:** The Groups should comprise members drawn from JSC constituencies and other appropriate bodies.
- **Chair for Examples Group 1:** Denise Lim (Library and Archives Canada)
 - Section 1. Recording attributes of manifestation and item
 - Chapter 7 from Section 2. Recording attributes of work and expression
- **Chair for Examples Group 2:** Adam L. Schiff (University of Washington Libraries)
 - Section 2. Recording attributes of work and expression (except chapter 7)
 - Section 3. recording attributes of person, family and corporate body
 - Chapter 16 from Section 4. Recording attributes of concept, object, event and place
 - Section 5. Recording primary relationships between work, expression, manifestation and item
 - Section 6. Recording relationships to persons, families, and corporate bodies associated with a resource.
 - Section 8. Recording relationships between works, expressions, manifestations, and items
 - Section 9. Recording relationships between persons, families, and corporate bodies.

Examples will not be required for Section 4 (other than Chapter 16), Section 7, and Section 10.

- **Timeline:** The Groups should make interim reports to JSC meetings in accordance with the Project Plan.
- **Working text:** The Groups should use drafts of parts of RDA as they become available from the Editor, as well as consulting AACR2. The Groups will be provided with drafts on which to work. It should be noted that the text will be subject to change whilst the Groups are working on it; this will require flexibility and tolerance from the Groups.

Charge

The Groups are asked to undertake this review for their allocated sections of RDA and provide new, revised or existing examples to be included as needed for each instruction in all parts of RDA.

In addition, the JSC may specifically request that the Groups provide additional composite or complete examples where this would assist the constituencies in reviewing drafts.

Additional guidance on providing examples

The General Introduction of RDA will provide information about the nature of examples:

- Examples illustrate the application of the specific instruction under which they appear, and illustrate only the data that is addressed by that instruction.
- Examples are given without the preceding or enclosing punctuation that is prescribed for an ISBD presentation
- Examples which include more than one element will include ISBD punctuation.
- Examples showing how to construct an access point by adding specified elements to the name or title will use AACR2 punctuation (to be added in a new appendix) to separate/enclose elements within the access point.

It will also cover the use, in examples, of explanatory notes to refer to related elements.

General guidance

- Prefer examples with literary warrant wherever possible.
- Provide simple and clear cut examples. If an example has the potential to confuse, don't include it.
- Examples should not introduce anything which itself would require explanation (e.g. words that need to be defined).

Form of the Examples

- ***Language and script of examples***
 - Each example should follow the instruction that it illustrates with respect to language and script. Note: specific instructions may override the instructions on *Language and script of the*

description given in the relevant general instruction in the first chapter of each section.

- A number of instructions now refer to “the language [or script] preferred by the agency creating the data” rather than English. In the examples, the language preferred by the agency should be taken as English. Likewise, the script preferred by the agency should be taken as roman.
 - Non-English language examples and examples using different scripts, etc., should be given if they are necessary to illustrate an instruction.
 - To ensure that the examples can be understood, at least one example under each instruction should be of an English language resource.
 - Where relevant, use the ALA-LC Romanization Tables (1997) (e.g. prefer Pinyin to Wade-Giles in examples which require a transliteration for Chinese).
- **Capitalization:** The examples should follow *Appendix A*. *Capitalization* as instructed in the relevant general instruction in the first chapter of each section, and any specific guidance given in the instruction.
- **Punctuation and Display:**
- The examples should follow the relevant general instruction in the first chapter of each section, and the Appendices on display where relevant.
 - The Appendices on display of authority data will provide information on displaying authority data in MARC21 and in a display using AACR2 punctuation (e.g. use of a hyphen after an open date will be included in the information on AACR2 punctuation, and the examples should follow that punctuation).
 - Terminal punctuation is not to be used for any example, i.e., no distinction to be made between an annotation and an access point.
 - Whenever the instructions do not require information to be given in a specific form, different forms may be used in the examples, e.g., 1,000 vs. 1000 in extent to illustrate that there is not just one way of recording the numbers
- **Abbreviations:** The examples should follow *Appendix B*. *Abbreviations* as instructed in the relevant general instruction in the first chapter of each section, and any specific guidance given in the instruction.
- **Initial articles:** The examples should follow *Appendix C*. *Initial articles* where instructed to do so.

Explanatory text

- Include the *type of resource* in the explanatory text for instructions on access points used to record the relationship between a resource and a

person, family, or corporate body associated with the resource (as often the access points given are reflective of the type of resource).

- Where possible, add the *specific role of the creator* in the explanatory text for instructions on access points used to record the relationship between a resource and a person, family, or corporate body associated with the resource.

Use of the same examples

- Where relevant, use examples based on the same resource under different instructions, e.g. when the instructions show alternatives; when the instructions show different conventions (providing they are all applicable); under the instruction for entities associated with the work and again under entities associated with the expression, and again under instructions on identifying works and expressions.

Relationship to the instructions

- Examples that consist only of a word which is prescribed in the instructions are not necessary.
- When a see reference is made to another instruction, examples illustrating the see reference are not given.
- Only give examples illustrating alternatives at the Alternative. Later examples should illustrate only the application of the main instruction.
- Examples are illustrative, not prescriptive; therefore examples should not be created to make up for a perceived lack in an instruction. Instead, suggest a change or addition to the instruction through your JSC representative.
- Examples under general instructions should not require the application of a later instruction, or of a special instruction. An exception to this is the instructions on the construction of an access point.

Range of examples

- If the instruction mentions several things that fall within its scope, provide an example of each.
- Have a reason for including every example and do not include multiple similar examples.
- Overall, in drafts for constituency review, include where applicable:
 - examples that cover a variety of media types, carrier types, and content types
 - examples of web resources and archival resources
 - examples for works, etc., in different genres
 - examples for different types of creator, etc. (persons, families & corporate bodies)
 - examples drawn from the US, UK, Canada & AustraliaBut, do not include examples of each of these at every instruction*.

*Additional examples that the Groups have collected may be used (a) in the online product providing it has the functionality needed to hide these examples when desirable, and (b) in supplementary products.