

JOINT STEERING COMMITTEE FOR DEVELOPMENT OF RDA

MINUTES OF APRIL 2007 MEETING

Library and Archives Canada, Ottawa

16-20 April 2007

[Note: does not include Executive Sessions]

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Minutes: of the thirty-fourth meeting of the Committee held at Library and Archives Canada, Ottawa, 16-20 April 2007.

Present: Deirdre Kiorgaard, Australian Committee on Cataloguing, in the Chair
John Attig, American Library Association (new representative)
Marjorie Bloss, RDA Project Manager
Jennifer Bowen, American Library Association (former representative)
Alan Danskin, British Library
Tom Delsey, RDA Editor
Nathalie Schulz, Secretary
Margaret Stewart, Canadian Committee on Cataloguing
Hugh Taylor, CILIP: Chartered Institute of Library and Information Professionals
Barbara Tillett, Library of Congress

Sue Brown, Chair of the Committee of Principals, was also in attendance.

Observers in attendance:

Rachel Gagnon, Library and Archives Canada
Lynne Howarth, FIS, University of Toronto
Judy Kuhagen, Library of Congress
Bill Leonard, Library and Archives Canada
Denise Lim, Library and Archives Canada
Chris Oliver, McGill University Library

Executive Session 1

129 RDA Scope and Structure

129.1 Received and considered the following documents:
5JSC/RDA/Scope
5JSC/ALA/5
5JSC/Strategic/1/Rev
5JSC/Editor/RDA/Objectives and Principles/Rev/3

129.2 [Note: included in 5JSC/M/Restricted/129-169.]

130 Communication with other resource description communities

130.1 Received and considered the following documents:
5JSC/Chair/12
5JSC/Chair/10

130.2 [Note: included in 5JSC/M/Restricted/129-169.]

End of Executive Session 1

131 Approval of the agenda

- 131.1 The following documents were added to the agenda (5JSC/A/5):
5JSC/ACOC rep/2/ACOC response
5JSC/Editor/RDA/Part A/Sources of information
- 131.2 The minutes reflect those agenda items and document series that were discussed. During the meeting it was agreed that discussion of agenda item 14 (Punctuation within elements) would be deferred until responses to relevant questions in the cover letter of the March 2007 draft of chapter 3 have been received.

132 Minutes of the previous meeting held 16-20 October 2006

- 132.1 The minutes of the previous meeting (5JSC/M/100-128, 5JSC/M/Restricted/100-128) were accepted.

133 RDA Part I Internationalization

- 133.1 Received and considered the following documents:
5JSC/LC/5
5JSC/LC/5/BL response
5JSC/LC/5/ALA response
5JSC/LC/5/CCC response
5JSC/LC/5/CILIP response
5JSC/LC/5/ACOC response
5JSC/LC/5/Rev
5JSC/LC/5/Rev/ACOC response
5JSC/LC/5/Rev/BL response
5JSC/LC/5/Rev/CILIP response
5JSC/LC/5/Rev/CCC response
5JSC/LC/5/Rev/ALA response
- 133.2 The Chair said that the JSC would be discussing proposals A-O from 5JSC/LC/5/Rev. She noted that proposal P (revision of 3.5.0.4) had been discussed at the previous meeting and that proposals Q and R were scheduled for later discussion (see 5JSC/M/150).
- 133.3 General comments
- 133.3.1 The Chair noted that the BL had asked in 5JSC/LC/5/BL response whether the limitations on what can be achieved in terms of internationalization should be expressed. Alan Danskin said that the issue was to do with different traditions and there was an interest in what had been agreed at IME ICC4 in Seoul. Barbara Tillett confirmed that the IME ICC draft *Statement* would contain principles to cover all traditions.
- 133.3.2 The Chair said that ALA had a general comment regarding labels. Jennifer Bowen said that ALA had suggested that provisions for language of mathematical data of cartographic materials (e.g., language of the term "Scale") be added to specific instructions. The Editor noted that this was related to the issue of encoding. He added that in a case such as this, the label could be generated from the name and definition of the element and did not need to be recorded in the data. Margaret Stewart noted that there was a MARC 21 implication as there is currently an indicator to suppress the print constant. The Chair said that there was a general issue of whether labels are part of the encoding schema. She asked if there

was an ISBD issue. The Editor noted that according to ISBD “Scale” would be recorded as a word.

Action=Secretary (MARC 21 implications; ISBD implications)

133.4 A. Proposed revision of 1.5 (Language and script of the description)

133.4.1 The Chair said that CCC had made the comment that “add” in the first option in 1.5 is ambiguous. Margaret Stewart said that it was not clear whether the cataloguer is adding to an existing data element or creating a new one. The Editor said that in his revisions to chapter 1 he had turned the option into an alternative and this removed the issue, i.e., “If an element listed above cannot be recorded in the script used on the source from which it is taken, record it in a transliterated form.” Hugh Taylor said that this rewording dealt with the CILIP concern regarding the option.

133.4.2 The Chair said that ALA and CCC had made comments regarding the second paragraph. Jennifer Bowen noted that the suggestions were very similar. Barbara Tillett said that LC was happy for the paragraph to be split into two. The JSC discussed the placement for the option currently given after the second paragraph: “Optionally, record the additions in the language and script preferred by the agency preparing the description”. During the discussion Jennifer Bowen noted that ALA wanted an option to add data in transliterated form, and this had been lost with the rewording of the alternative after the first paragraph. The Editor said that there were three concepts involved: 1. there is data on the source that would either have the transliterated form substituting for the original script, or in addition to the original script; 2. there is data that is not present and needs to be supplied; and, 3. there is data available, but the cataloguer wants to add more. He added that for the second two types both language and script needed to be chosen. There was general agreement that for data that is added to the record, the first preference is the language of other parts of the description, and then the language of the catalogue. The JSC discussed the ALA suggestion that the phrase “the most appropriate language or script” be expanded. The JSC decided that the general phrase could not be replaced, as what will be done in each case is context specific. The Chair noted that this should be flagged as a training issue. The JSC agreed that the second paragraph at 1.5 in 5JSC/LC/5/Rev would be split into two, with the option after both.

Action=Editor; Secretary (Training issues)

133.4.3 Jennifer Bowen read out the ALA comment on the third paragraph; “It is the practice right now in the U.S. JACKPHY community, and spreading into Cyrillic as well, to provide both the original script and also the transliterated form in parallel fields for other elements, such as notes. In fact, the wording “in the language(s) and script(s)” suggests there are no restrictions on multiple languages and scripts for all of the “other elements”. We would like to preserve the option to do both for other elements the same as for the elements listed under the 1st bullet.” Jennifer Bowen confirmed that no restriction was intended.

133.4.4 The Chair said that in the fourth paragraph ALA and CCC had suggested that “transliteration” be used instead of “romanization”. The JSC agreed. The JSC also agreed to the ALA rewording of the exception and the addition of an option. The Editor noted that the option would be an alternative to the exception.

Action=Editor

133.5 B. Proposed revision of 1.6.2 (Numbers expressed as numerals or as words)

- 133.5.1 The JSC discussed the ALA suggestion that all transcribed elements be listed under the first paragraph, and all others under the second paragraph. The JSC decided to make the second paragraph the first paragraph and, in the paragraph on transcribed elements, refer to the list of transcribed elements at 1.5.
Action=Editor
- 133.5.2 Hugh Taylor noted that CILIP had not liked the removal of the edition statement from the list of recorded elements (which meant that the special instructions on numbers would not apply), but that it would be accepted as part of the wider move to transcription.
- 133.5.3 The JSC decided that the remaining comments on 1.6.2 were editorial and referred them to the Editor. The comments on examples were referred to the Examples Group.
Action=Editor; Examples Group 1
- 133.6 Barbara Tillett asked if there needed to be an extension to 5JSC/LC/5/Rev to cover Part B issues. The JSC later agreed this would be useful. (See also 5JSC/M/147.15.1)
- 133.7 C. Proposed deletion of 1.6.2.1 (Roman numerals)
- 133.7.1 The JSC agreed to the deletion.
Action=Editor
- 133.8 D. Proposed deletion of 1.6.2.2 (Numbers expressed as words)
- 133.8.1 The JSC agreed to the deletion.
Action=Editor
- 133.9 E. Proposed revision of 1.6.2.3 and renumbering as 1.6.2.1 (Script of numerals)
- 133.9.1 Jennifer Bowen said that she thought it had caused some confusion that the option at 1.6.2.1 was not mentioned at 2.6.0.3 and 2.9.0.3. She said that it was not necessary to discuss this further. The Editor said that the instruction would need to be broken into both an optional addition (to add numerals) and an alternative (to substitute numerals), and the alternative would come first.
Action=Editor
- 133.9.2 Jennifer Bowen said that ALA thought that it was more international to use Western-style Arabic numerals instead of recording numbers as they appear. She added that ALA would withdraw this as it was not supported by the other constituencies. She noted that ALA thought the option seemed redundant. The Editor said that it was needed to allow use of Western-style Arabic numerals. Jennifer Bowen withdrew the ALA comment.
- 133.9.3 The Chair noted that the CCC comment was no longer applicable.
- 133.9.4 Hugh Taylor said that CILIP had asked whether the option in the proposal is intended to provide for the substitution of roman numerals by some other system. Barbara Tillett said that it would allow for this.
- 133.10 F. Proposed revision of 2.2.2 (More than one preferred source of information)
- 133.10.1 Barbara Tillett noted that 2.2.2 had been covered in the JSC conference call on sources of information (Note: see 5JSC/M/141.14).

- 133.10.2 The Chair asked whether the revisions to 2.2.2 covered the ALA suggestion to add the language or script of the issuing body to the list of decision criteria. Barbara Tillett noted that this would involve research to find out the language or script of the issuing body. John Attig withdrew the suggestion.
- 133.11 G. Proposed revision of 2.5.1.3 (Recording edition statements)
- 133.11.1 In response to comments from the constituencies, the JSC agreed that “considered to be important” was not required in the instruction.
Action=Editor
- 133.12 H. Proposed revision of 2.6.0.3 (Numbering – Transcription)
- 133.12.1 Barbara Tillett suggested that the proposal that the caption be changed from “transcription” to “recording numbering” be left to the discretion of the Editor. The JSC agreed.
Action=Editor
- 133.12.2 The JSC discussed the ALA suggestion that the reference to 1.6 be restored. It was noted that there was a contradiction with listing the numbering elements in the list of elements to which 1.6.2 is applicable and then having at 2.6.0.3 “Record numbering in Western-style arabic numerals”. There was agreement that this element would not be transcribed. The Editor said that he would find a way to make this clear at 1.6, the issue being that 1.6 deals with transcription.
Action=Editor
- 133.12.3 The JSC discussed the CCC suggestion to collapse the first two paragraphs into one, and decided that this is not appropriate as the second should be labelled as an exception.
Action=Editor
- 133.12.4 Alan Danskin queried why the instruction was to record numbering in Western style arabic numerals even though some agencies might not normally use them. The JSC decided that the instruction would be to record the numbering in the numerals preferred by the agency as this would be more international. It was agreed that there still needed to be an exception not to substitute numerals if it makes the statement less clear, but that it would be generalised. It was noted that there was no need for the option at 2.6.0.3 in 5JSC/LC/5/Rev as it is now the basic instruction.
Action=Editor
- 133.13 I. Proposed revision of 2.6.3 (No designation on first issue or part)
- 133.13.1 The JSC agreed with the ALA suggestion to use “and script(s)” and the CCC suggestion to (in the second sentence) use “supply” instead of “record”.
Action=Editor
- 133.14 J. Proposed revision of 2.6.5 (New sequence of numbering)
- 133.14.1 The JSC discussed the CCC suggestion that the final parenthetical statement be retained and revised to: “(or its equivalent in the language and script of the title proper)”. Barbara Tillett noted that this could result in a mix of languages being used in the data element. She added that people could change the English terms to their own language. The Editor noted that this would be covered in the Introduction. The JSC decided to accept the wording in 5JSC/LC/5/Rev (i.e., without the final parenthetical statement).

Action=Editor

133.15 K. Proposed revision of 2.9.0.3 (Date of publication, distribution, etc. – Transcription)

133.15.1 The Editor said that, due to the changes made by LC, he agreed with the comments which said that use of the word “transcription” in the caption is not appropriate. The Chair noted that BL had said that the phrase “Western-style arabic numerals” is clumsy. Barbara Tillett suggested that if the option at a) became the instruction it would match 2.6.0.3 and remove the problem BL had with the wording. The Editor noted that there would no longer be an element for date of publication, but elements for publication, production, distribution, etc. He confirmed that he would treat each one the same. He asked if the instructions on chronograms would also need to be repeated. The JSC members said that they would be.

Action=Editor

133.15.2 The Chair confirmed that the ALA request to reinstate the reference to 1.6 was the same as that raised under H and had been discussed.

133.15.3 The Chair noted that ACOC and CILIP had said that the options a)-c) at 2.9.0.3 were actually alternatives. Barbara Tillett commented that option a) would now be the main instruction. The Editor added that it actually contained an alternative and an optional instruction. The Chair noted that CCC wanted options a) and b) reversed. The Editor said that option b) was not required as the base instruction (at 1.6) is to record what is found.

Action=Editor

133.15.4 The Chair said that both ALA and CCC had asked about fictitious dates. The Editor said that he thought there had been agreement that correction of fictitious dates would be made in a note. Margaret Stewart said that CCC would agree to this. John Attig said that the ALA preference would be to continue to add corrections to the data element but that this was inconsistent with other fictitious information which is recorded in a note. The JSC agreed that correction of fictitious dates would be made in a note.

Action=Editor

133.16 L. Proposed revision of 2.9.0.4 (Chronograms)

133.16.1 The Chair noted that at Line 352 in the Part I response table there was a comment from CILIP that this instruction should be aligned with DCRM(B). Hugh Taylor said that CILIP would withdraw this as there was no agreement from the other constituencies. The JSC agreed with the LC changes to 2.9.0.4. (Note: see also 5JSC/M/133.15.1)

Action=Editor

133.17 2.10.6.3 Numbering within series

133.17.1 Jennifer Bowen noted that ALA had requested confirmation as to whether numbering within series will be a recorded element. Barbara Tillett said that it had not been included in 5JSC/LC/5 as there were no changes required for internationalization. The Editor noted that the instruction referred to 1.6.

133.18 M. Proposed addition of new 2.10.6.4 (Numeric and/or alphabetic designation in more than one language or script)

133.18.1 The JSC agreed with the proposed addition.

Action=Editor

- 133.19 N. Proposed revision of current 2.10.6.4 and renumbering as 2.10.6.5 (Chronological designation)
- 133.19.1 Jennifer Bowen said that the ALA comment regarding the contradiction with 2.6.2.3 and 2.6.0.3 was similar to that made previously. The JSC agreed with the ALA proposed simplification of the wording. The Editor noted that in the Scope Analysis he had broken up the numbering into different sub-elements and this could make the simplified wording moot. (Note: see 5JSC/M/139).
Action=Editor
- 133.20 O. Proposed revision of current 2.10.6.5 and renumbering as 2.10.6.6 (New sequence of numbering)
- 133.20.1 The JSC agreed with the proposed revision.
Action=Editor
- 133.21 Part I response table
- 133.21.1 The JSC discussed the best way to deal with the comments in the Part I response table marked with the status “5JSC/LC/5/Rev”. The JSC decided to wait to see the revised wording in chapters 1 and 2 from the Editor before bringing forward any comments that are still outstanding.
Action=JSC

134 Persistent identifiers and URLs

- 134.1 Received and considered the following documents:
5JSC/ACOC/1
5JSC/ACOC/1/LC response
5JSC/ACOC/1/BL response
5JSC/ACOC/1/CCC response
5JSC/ACOC/1/CILIP response
5JSC/ACOC/1/ALA response
5JSC/ACOC/1/Rev
5JSC/ACOC/1/Rev/CILIP response
5JSC/ACOC/1/Rev/BL response
5JSC/ACOC/1/Rev/LC response
5JSC/ACOC/1/Rev/CCC response
5JSC/ACOC/1/Rev/ALA response
- 134.2 General comments
- 134.2.1 The Chair noted that ALA had requested clarification regarding the functional objectives of RDA, and the place of the FRBR “obtain” task. The Editor noted that these comments had been made prior to the October 2006 meeting. John Attig said that things had clarified themselves to a certain extent since then. The Chair said that in any case she thought that all of the instructions in the proposal could be justified in terms of the user task of identification.
- 134.2.2 The Chair said that BL had asked where the coverage was for URLs for resources in multiple languages. The Editor noted that more than one URL could be recorded. The Chair added that URLs were recorded for the resource being described.

- 134.3 The JSC discussed the responses to the questions in 5JSC/ACOC/1/Rev.
- 134.4 **Question 2.** Should the distinction between Standard identifiers and Other resource identifiers be retained?
- 134.4.1 Barbara Tillett said that she did not see any advantage in keeping them separate if they were not treated differently. The Chair said that if the distinction is removed, and the resource identifier is a required element, there would not be any mechanism to prefer standard identifiers over other resource identifiers. The Editor noted that the distinction was a carry-over from ISBD, which recorded the numbers in different areas.
- 134.4.2 Margaret Stewart said that CCC wanted to retain the distinction, and to limit standard identifiers to those assigned by standards bodies as these would be maintained and administered. The Editor noted that in the current context (e.g., self-registration of URIs) it was difficult to say what constitutes a standard number. Margaret Stewart said that she was willing to agree with the other constituencies in the interests of simplification. The JSC agreed to remove the distinction. The Chair said that the difference with ISBD should be noted.
Action=Editor; Secretary (ISBD issues)
- 134.4.3 The Editor commented that you couldn't just put in an identifier without saying what it is. The Editor noted that some resource identifiers came with their own encoding standard and others did not, and this would need to be made clear.
Action=Editor
- 134.5 **Question 1.** Should the definition of Standard identifier be expanded to include identifiers assigned by registration agencies of other standards bodies, and if so which ones?
- 134.5.1 The Chair noted this question was now moot in that there would no longer be a separate element for standard identifiers.
- 134.6 **Issue 3.** Persistent identifiers and Standard identifiers
- 134.6.1 The Chair said that this issue did not now need to be discussed.
- 134.7 **Question 4.** Where should the new instruction for Uniform Resource Locators be placed?
- 134.7.1 The JSC agreed that the instructions would be in chapter 5 and left the placement at the discretion of the Editor.
Action=Editor
- 134.8 **Question 5.** Should the "Uniform Resource Identifier" (URI) be used in place of "Uniform Resource Locator"?
- 134.8.1 The JSC decided not to use "Uniform Resource Identifier" in RDA as URNs and URLs are both URIs but are treated differently. There was agreement that URNs would be covered in chapter 2, and URLs in chapter 5. It was also agreed that actionable URNs would be covered by the instructions in chapter 5 (see 5JSC/M/134.16.1).
Action=Editor
- 134.9 **Question 6.** Should "global" be removed from the definition of Uniform Resource Locator as recommended in 5JSC/ACOC/1/ALA response?

- 134.9.1 The Editor suggested that the WC3 definition of Uniform Resource Locator be used. (Note: see 5JSC/M/134.17.1)
Action=Editor
- 134.10 **Question 7.** Should cataloguers take URLs only from the browser address window displaying the resource as suggested in *5JSC/ACOC/1/ALA response*?
- 134.10.1 John Attig said that ALA would withdraw this suggestion as none of the other constituencies agreed.
- 134.11 **Question 8.** Should the instructions at 5.X.0.3 and 5.X.0.4 (single and multiple URLs) be combined as suggested in *5JSC/ACOC/1/ALA response*?
- 134.11.1 The JSC agreed to combine the instructions, and that essentially 5.X.0.4 would become the instruction. The Chair said that CCC wanted to avoid implying that recording even one URL would be subject to the policy of the agency preparing the description. It was noted that the JSC would need to include this in the discussion on required elements. The Editor commented that the second paragraph of 5.X.0.4 was “data about data” and would be covered in the proposed Part C (see also 5JSC/M/134.19.1).
Action=Editor; JSC
- 134.12 **Question 9.** Should the second sentence [in 5.X.0.4] be deleted as suggested in *5JSC/ACOC/1/ALA response*?
- 134.12.1 The Chair said that it had been pointed out in the responses that the sentence had already been deleted from the proposal.
- 134.13 **Question 10.** Should the proposed new instruction [1.7.7] be given, and if so, in what form?
- 134.13.1 The Editor noted that the instructions on citing other works and manifestations had been removed from 1.7. He added that there were instructions to cover this in chapter 7. The Chair suggested that the Examples Group be asked to move the proposed additional examples to chapter 7 as appropriate. The Editor said that these examples would go under the instructions that told you to reference a related resource by use of a description.
Action=Examples Group 2
- 134.14 **Question 11.** Should RDA explicitly provide instructions for recording identifiers at all FRBR levels (work, expression, manifestation, and item), and if so, where should these instructions be placed?
- 134.14.1 The Chair asked if this would come up in discussion of later chapters. The Editor noted that the resource identifiers in the context of chapter 2 were for the manifestation or item. He added that identifiers for the work or expression would be covered by chapter 13.
- 134.15 The JSC discussed the constituency comments on the specific proposals in 5JSC/ACOC/1/Rev.
- 134.16 2.13.2.1. Recording other resource identifiers
- 134.16.1 The JSC discussed the wording for the final bullet proposed by ALA and LC and agreed on: “For resource identifiers that potentially resolve to an online resource see 5.X.”

134.17 5.X.0.1. Definition

134.17.1 The Editor said that all definition sections would now be scope sections. The Chair added that the JSC had agreed to look at the WC3 definition of URL. It was noted that some of the LC wording at 2.13.2 could be used at 5.X.0.1. Note: the next day the JSC reviewed the WC3 definition and decided that it was not suitable for use in RDA. The JSC agreed to remove “global” from the definition, so that it became: “the address of an online resource”. The JSC also agreed to expand the scope with the LC wording.

Action=Editor

134.18 5.X.0.3. Recording Uniform Resource Locators

134.18.1 The JSC asked the Editor to evaluate whether the reference to 1.7.7 should be replaced by a reference to chapter 7.

Action=Editor

134.19 5.X.0.4. Recording multiple Uniform Resource Locators

134.19.1 The Chair noted that the ALA and LC comments on the first bullet were covered by the combination of the instructions. She added that the JSC needed to discuss the ALA preference for the use of structured metadata to indicate the nature of multiple URLs. The Editor said that there was a question as to whether a qualifier to a URL was legitimate metadata. He noted that it meant recording data in an element that does not meet the definition of the element. He added that it had previously been noted that this was “data about data”, and that the JSC needed to discuss this in relation to encoding.

134.20 5.X.0.5. Recording changes in Uniform Resource Locators

134.20.1 The Chair noted that ALA wanted to simplify the instruction and LC wanted to either delete the first bullet or indent the next three bullets. The Editor noted that there was a difference from chapter 2 where incorrect and cancelled resource identifiers were retained with a qualifier. He suggested that the same thing needed to be done with URLs because if a URL had ever been used in a citation it should be retained in the record. The JSC agreed. The Editor noted that these qualifiers were “data about data”. Hugh Taylor said that CILIP wanted to reflect in the caption that many changes are not in the URLs themselves but the consequence of some other situation occurring. The Editor said he thought that paralleling the instructions with those in chapter 2 would resolve this issue.

Action=Editor

134.21 1.7.7. Notes Citing Uniform Resource Locators for related resources

134.21.1 The Chair noted that comments on 1.7.7 were moot as the instruction no longer exists.

134.22 3.11. Other formats

134.22.1 The Chair noted that it had already been agreed to refer the examples to the Examples Group.

134.23 MARC 21 fields 015, 026

134.23.1 The Chair noted that at the previous meeting it had been agreed to discuss two questions from the September 2006 RDA and MARC 21 discussion paper with 5JSC/ACOC Rep/1.

134.23.2 From the discussion paper: “015 National bibliography number – the mapping has treated this field in the same manner as field 010 and 016, i.e., “Out of scope” since they have been considered numbers identifying the bibliographic record and not the resource. Does JSC agree or can number carried in field 015 identify the resource and be mapped to 2.13?” The JSC decided that the 015 was out of scope for chapter 2 as it was not a resource identifier. The Editor noted that if you considered the bibliographic record as a work, the 015 would only fit in chapter 7 as an identifier for a related resource. The Chair suggested that this be discussed with chapter 7. [Note: was not discussed.]

134.23.3 From the discussion paper: “026 Fingerprint identifier – should this be considered a resource identifier and mapped to 2.13?” The Editor noted that there was a difference of opinion as to whether the fingerprint identifier for early printed materials was an attribute of the manifestation or of the item. He added that it was intended to be an attribute of the manifestation. The JSC discussed the issue and decided that the fingerprint identifier would be covered with resource identifiers in chapter 2.

Action=Editor

135 Change to AACR2 rule 5.5B1 (RDA 3.4.2.2.2) Extent of item for notated music, and Glossary definition of “Score”

135.1 Received and considered the following documents:

5JSC/ALA/4

5JSC/ALA/4/CCC response

5JSC/ALA/4/LC response

5JSC/ALA/4/BL response

5JSC/ALA/4/CILIP response

5JSC/ALA/4/ACOC response

135.2 Jennifer Bowen explained that ALA had put forward a proposal from the Music Library Association (MLA) to eliminate the use of “v./p./leaves of music” in favour of “score”. The Chair noted that all constituencies agreed with the proposal except the Library of Congress. Barbara Tillett explained that staff at LC thought that “score” should not be used for works written for one performer. The JSC agreed with the ALA argument that the term “score” is used more broadly by musicians and that this wider definition is now included in reference sources. Barbara Tillett said that LC would accept the change. It was noted that this would mean the removal of 3.4.2.2.2 in the latest draft of chapter 3.

Action=Editor

135.3 The JSC discussed the suggested changes to the definition of “score” suggested by CCC. Jennifer Bowen said that the MLA had been consulted, and they thought that the addition of the sentence as proposed by CCC proposed would be confusing. The JSC agreed, and made some small changes to the wording. Jennifer Bowen said that it had taken the MLA some time to construct the definition in the proposal and she wanted to consult with them. The JSC agreed.

Action=ALA representative

135.3.1 Revised wording:

Score. Graphical, symbolic, or word-based music notation representing the sounds of all the parts of an ensemble or a work for solo performer or electronic media. Do not confuse with Part (Music). *See also* Choir book, Chorus score, Close score, Condensed score, Miniature score, Part (Music), Piano [violin, etc.] conductor part,

Piano score, Short score, Table book, Vocal score.

Action=Glossary Editor

- 135.4 The JSC agreed with the two new definitions proposed by CCC. Jennifer Bowen said that she would confirm these with MLA.

Choir book. A large music book made to be placed on a stand in front of a choir. Each part is notated separately, usually in the configuration that presents, when the book is open, the soprano and tenor parts on the verso of a leaf, and the alto and bass parts on the recto of the next leaf.

Table book. A large music book made to be placed on a table and displayed in such a way that the performers can read their parts while seated or standing across or around the table. Each part is notated separately, usually in a configuration that presents, when the book is open, different parts in inverted and/or perpendicular positions.

Action= ALA representative; Glossary Editor

- 135.5 Jennifer Bowen said that she would check if MLA agreed with the CCC proposed changes to 5.5B1:

5.5B. Extent of item (including specific material designation)

5.5B1. Record the number of physical units of an item by giving the number of scores or parts in arabic numerals and one of the following terms as appropriate:

score
condensed score
close score
miniature score¹
piano [violin, etc.] conductor part
vocal score
piano score
chorus score
part
choir book
table book

1 score

1 vocal score

4 parts

1 choir book

If the item is a manuscript, precede the term by *ms.*

1 *ms.* score

[footnote:] ¹ Use for scores reduced in size and not intended primarily for performance.

Action=ALA representative

- 135.6 Barbara Tillett noted that it had already been agreed that “miniature score” would not be used in RDA.

Action=Editor; Glossary Editor**136 Provenance, custodial history and immediate source of acquisition**

- 136.1 The Chair reminded the JSC that, as agreed at the October meeting, the CILIP representative had prepared an informal proposal for instructions on provenance, custodial history, and immediate source of acquisition. The JSC agreed with this proposal, as amended by comments from the LC representative and the CCC representative.

- 136.1.1 Instructions to read:

2.X.0 BASIC INSTRUCTIONS ON RECORDING CREATION OF A COLLECTION OR AN ARCHIVAL RESOURCE

Contents

- 2.X.0.1 Definition
 - 2.X.0.2 Sources of information
 - 2.X.0.3 Recording creation of a collection or an archival resource
-

2.X.0.1. Definition

- Creation of a collection** is information about the person, family, or corporate body responsible for the initial creation, accumulation or formation of a collection, including archival resources.

2.X.0.2. Sources of information

- Take information on the creation of a collection from any source.

2.X.0.3. Recording creation of a collection or an archival resource

- Record information about the person, family, or corporate body responsible for the initial creation, accumulation or formation of a collection.

2.X.0 BASIC INSTRUCTIONS ON RECORDING CUSTODIAL HISTORY

Contents

- 2.X.0.1 Definition
 - 2.X.0.2 Sources of information
 - 2.X.0.3 Recording custodial history
-

2.X.0.1. Definition

Custodial history is a record of previous ownership or custodianship of a resource.

2.X.0.2. Sources of information

➤ Take information on custodial history from any source.

2.X.0.3. Recording custodial history

➤ Record transfers of ownership, responsibility, or custody or control of the resource. Add the years of ownership to the name of a previous owner.

2.X.0 BASIC INSTRUCTIONS ON RECORDING IMMEDIATE SOURCE OF ACQUISITION

Contents

2.X.0.1 Definition

2.X.0.2 Sources of information

2.X.0.3 Recording immediate source of acquisition

2.X.0.1. Definition

Immediate source of acquisition is the source from which the agency directly acquired the resource and the circumstances under which it was received.

2.X.0.2. Sources of information

➤ Take information on the immediate source of acquisition from any source.

2.X.0.3. Recording immediate source of acquisition

➤ Record the source from which the resource being described was acquired, the date of acquisition, and the method of acquisition, if this information is not confidential.

Action=Editor

136.2 The Editor said that he had some concerns regarding the use of the term “creation”, as the “creator” would be covered in chapter 6 (see 5JSC/M/149.6).

137 Discussion Paper on Mode of Issuance in RDA

137.1 Received and considered the following document:
5JSC/Editor/RDA/Mode of issuance

137.2 The Chair reminded the JSC that at the October 2006 JSC meeting there had been a discussion on the mode of issuance paper prepared by the Editor insofar as it affected the instructions in chapter 3 (5JSC/M/114). Later in the meeting, it was noted that after the

October meeting there had been further discussion on whether a change in carrier characteristics would result in a new description. The JSC decided to discuss the issue with comments on 1.3 (Changes requiring a new description). [Note: was not discussed.]

Action=JSC

- 137.3 The Editor noted that Judy Kuhagen had, in an email, presented a different approach to the situation that occurs when a resource is both integrating and a serial or multipart monograph. Judy Kuhagen said that her comments also reflected the view of serials people at LC and CPSO. She said that the focus should be on what is being described, with the knowledge that parts can be described separately and exhibit different behaviour to the whole. The practical reality for day to day cataloguing is to describe the overall behaviour of the resource you have decided to describe. If an analytic record is prepared for a single part of a monographic series, it would be a monograph record, and it would not matter that the parent record is a serial. If a record were prepared for the parent resource as a whole, the focus would be on the behaviour that is most prevalent.

The Editor said that he was not talking about a part within a whole, but cases where the whole resource is behaving in two ways simultaneously. An example of this is the new type of electronic journal that has discrete parts added periodically which may have integrating elements (e.g., collaborative authoring). When dealing with resources such as this it needs to be clear which RDA instructions apply. Even if the behaviour does not happen throughout the whole resource, if the integration is affecting the source of information for identification of the resource this will have an impact. Judy Kuhagen noted that this was behaviour over time, which was something that AACR2 did not address well, although an effort had been made with the revisions to chapter 12. She added that the issue centred on when to redo an existing description as opposed to creating a new description. The Editor said that what he was trying to get across with his analysis of mode of issuance is that AACR2 treated the different categories of mode of issuance as mutually exclusive. He said that in the future there are likely to be more resources that exhibit characteristics of multiple modes of issuance.

- 137.4 Judy Kuhagen noted that in the case of a library creating a description for a serial based on volume 2, when the first volume was received with a slightly different title, some libraries would back up the description to reflect this, and others would not but would simply add another access point. The JSC discussed whether RDA should include instructions for “best practice” in this situation. The JSC decided that instructions would be written in terms of what should be done. Barbara Tillett noted that it also needed to be clear what to do if you did not have the first issue. The JSC agreed that, the description should be based on the first issue; if it was not, and the first issue became available later, it should be revised to reflect the first issue. Otherwise, there is the potential for multiple records for the same resource.
- 137.5 The Editor said that in 5JSC/Editor/RDA/Mode of issuance he had tried to capture all instructions that deal with changes over time. He noted that there was also an extract from the Part I response table of line numbers that dealt with mode of issuance, and that some line numbers in the extract from the RDA wiki had also been given this status.
- 137.6 2.1 Basis for identification of the resource
2.1.1 Comprehensive description
- 137.6.1 Line 91: Create new section "Resource issued as a single unit" (CCC)

The Editor said that the first section in the table in the document was “Basis for identification of the resource”. He noted that there had been a suggestion from the constituencies to include instructions in the draft for “resource issued as a single unit”. He added that in the draft discussed in October 2005, he had provided separate instructions for each of the major categories of mode of issuance, but the JSC had decided that this was too repetitive (5JSC/M/41.17). The JSC discussed the issue, and decided that in the online product it would be most useful to treat each mode of issuance discretely. It was agreed that a general principle would be given first if possible, and that separate instructions would be given for each of the modes of issuance where this was possible. The Chair noted that it would assist with the constituency review to make this decision clear, and communicate it in the cover letter.

Action=Editor; Secretary (Cover letter)

- 137.6.2 Judy Kuhagen asked whether the instructions on the type of description at 1.1.4 should come before the instructions on mode of issuance (at 1.1.2). She noted that the mode of issuance could be different whether you were describing the whole or the part. The Editor noted that the section in 1.1 contained expanded definitions. He added that he would take this suggestion into consideration.

Action=Editor

- 137.7 2.1.1.1 Resource issued in successive parts

- 137.7.1 Line 93: Final para: use "the basis for the identification of the resource" (CCC)

The Editor noted that the comparable instructions in AACR2 were those on “Basis of description”. He explained that this is broader than 2.1, which is to do with basis of identification for the resource. The JSC agreed to use “basis for identification of the resource” in the instructions.

Action=Editor

- 137.7.2 Line 94: Simplify wording, add option for agencies that want to "back-up" the description (LC)

The Chair noted that when a description is not based on the first issue, and the first issue becomes available, there are two ways to change it, either to redo the description, or to add notes. Judy Kuhagen said that currently 2.1.1.1 did not tell you what to do if you received the first issue after the description had been created. The JSC discussed this, and it was noted that the proposed LC option did not specify redoing the description or adding notes, but left it open to interpretation. The JSC agreed to include in RDA the general concept that a description should be revised when new information becomes available.

Action=Editor

- 137.7.3 Line 92: 4th para: Move after 1st para (ALA); 1st para, ii) and iv) reword (CCC)

The JSC agreed to leave these editorial changes to the Editor.

Action=Editor

- 137.8 2.1.1.2 Integrating resource

- 137.8.1 Line 95: 1st para: add refs to areas of 2.2 (ALA)

John Attig said that this was an editorial comment and was not substantive.

137.9 2.1.1.3 No source of information identifying the resource as a whole

137.9.1 Line 101: Para c): clarify (ALA)

Jennifer Bowen read from the ALA response: “This needs clarification because it is not clear if integrating resources are covered by the general information given in the first bullet. We question why integrating resources are split out from the general instruction here. In 2.1.1.3c), it says that when an integrating resource has no separate source of information identifying the resource as a whole, to “use an alternative source issued in a) or b) above, as appropriate”. It is not clear under what circumstances one should apply option a) “resource issued as a single unit” vs. option b) “issued in two or more parts simultaneously” to electronic integrating resources. Since they are integrating, would they be considered a “resource issued as a single unit”? Or would a website be considered “issued in two or more parts simultaneously”... Would a site containing two or more parts be considered “issued simultaneously” if the parts were not all added to the site at the same time (since the site is continually updated)?”

The Editor said that part of the issue was to do with how to tell if an online resource has more than one part. He added that this is why the definition of “part” is important. The instructions and conventions in AACR2 assume that you can make distinctions necessary to categorise a resource in terms of mode of issuance based on physical evidence. In the digital environment, this evidence is no longer available. The JSC discussed the issue and decided that if there are no discernable parts the resource should be treated as a single unit. The Editor said that he would work this into RDA, possibly at 1.1 or 2.1. The Chair suggested that the issue should be kept on the agenda for post-publication of RDA.

Action=Editor; Secretary (List of issues for consideration after first release of RDA)

137.9.2 Line 102: Add exception for replacement volume sets (ALA)

Jennifer Bowen noted that some of the constituencies had indicated agreement in the response table. Barbara Tillett said that she had an issue with introducing this sort of case law. Judy Kuhagen said that LC CPSO and AALL had discussed the issue of treating replacement volume sets as integrating resources. She added that CPSO had concerns about the implications for identification of the whole resource. Hugh Taylor and Alan Danskin said that there was no pressure from their constituencies to introduce this change. As there was no agreement, ALA withdrew the suggestion.

137.10 2.1.2 Analytical description

137.10.1 Line 104: Para c): add additional instructions

Jennifer Bowen read from the ALA response: “This instruction seems to assume that a component part of an integrating resource is also always an integrating resource, which is not always the case (there are occasionally newsletters issued as part of a printed integrating resource; a component part of an updating website can be a monograph or serial). ALA suggests including additional instructions to choose sources for component parts that are monographs, serials and updating resources as they would be treated if they were issued alone.” The JSC agreed with the Editor’s suggestion that changing the caption from “Parts of an integrating resource” to “Integrating resource” would resolve the issue raised by ALA.

Action=Editor

137.11 Title proper

137.11.1 The Editor commented that in the case of a title in two or more forms there was an exception for serials to choose a full form over an acronym or initialism. He asked if this exception was justified. Barbara Tillett explained that this provision was part of the agreements made with the ISBD and ISSN communities during the revision of chapter 12. Judy Kuhagen noted that this was originally an ISSN convention, as the long title is used as the basis of the key title. The JSC decided that the exception would be maintained, but after the first release of RDA it would be discussed with the ISSN and ISBD communities to see if it can be removed. It was confirmed that, as agreed at line 160 in the response table, the exception would be extended to integrating resources to match AACR2.

Action=Editor; Secretary (List of issues for consideration after first release of RDA)

137.12 2.3.0.3 Transcription

137.12.1 Line 140: Expand to include integrating resources

The exception reads: “For inaccuracies in the title proper of a resource issued in successive parts follow the instructions in 2.3.1.7a”. The JSC agreed to include integrating resources to match the status quo in AACR2 and to flag the exception for later discussion with the ISBD and ISSN communities.

Action=Editor; Secretary (List of issues for consideration after first release of RDA)

137.12.2 The Editor said that the next section in the table was: “Title proper includes statement mentioning earlier title, etc.” (Included in paragraph a) in 2.3.1.7 Basic instructions on recording the title proper). The JSC agreed to apply 2.3.1.7 a) to serials and integrating resources to match AACR2 12.1B1 (Lines 141, 162).

Action=Editor

137.12.3 The Editor noted that when the date, name, number, etc. in the title proper varied, there was an exception for serials to replace these by the mark of omission (2.3.1.7 b). He added that according to the mode of issuance table this would also occur for integrating resources which are also serials. Judy Kuhagen checked and said that in AACR2 the instruction only applied to serials. The JSC confirmed that 2.3.1.7 b) would apply only to serials.

137.12.4 Line 143: Exception: reword and add text for introductory words (LC)

The Chair noted that the LC suggestion would result in the exception at 2.3.0.3 reading as: “For inaccuracies in the title proper of a serial or multipart monograph follow the instructions in 2.3.1.7a). For introductory words, etc., follow the instructions in 2.3.0.5.” The Editor suggested that reference to 2.3.0.5 was not required as the first paragraph in 2.3.1.7 referred you to 2.3.0. The Editor confirmed that he would change the wording at the exception at 2.3.0.3 to match 2.3.1.7 a). It was noted that the issue of introductory words was covered by the CILIP comment at line 149 (see 5JSC/M160.5).

Action=Editor

137.13 2.3.1.11 Recording changes in the title proper

137.13.1 The Editor explained that he did not think it was clear what to do when a resource is both an integrating resource and a serial. The JSC decided to include instructions under a) Multipart monographs and b) Serials to make it clear that if the issue used as the basis of

the description operates in an integrating fashion that the title proper should be changed to reflect the latest iteration.

Action=Editor

137.13.2 Line 167: Reword as not all agencies will "back-up" [new proposal] (LC)

Discussed at Line 94 (5JSC/M/137.7.2). Line numbers 174, 210, 211, 216, 220, 221, and 222 on the same topic not discussed individually as the same principle would apply.

137.14 2.3.3.3 Basic instructions on recording other title information

137.14.1 Line 181: 1st para: Reword (CCC)

Margaret Stewart explained that the rewording was to make it clear that the instruction was limited to serials and integrating resources. The JSC agreed and asked the Editor to make any editorial changes as required.

Action=Editor

137.15 2.3.3.6 Recording changes in other title information

137.15.1 Line 195: Para c) 2nd para: reword (LC)

The JSC confirmed agreement with ACOC's suggestion to use 2.4.2 as template for changes.

Action=Editor

137.16 2.3.5 Earlier/later title

137.16.1 Line 206: Delete and include instructions with section on variant titles (ALA)

Jennifer Bowen explained that ALA was concerned about the use of "earlier" and "later" in the caption and instructions and the potential for confusion with serial cataloguing practices. Barbara Tillett said that was why LC had suggested that the caption include "and not requiring a new record" (line 207). The JSC decided not to move the instructions to the section on variant titles, as having a separate element subtype conforms to distinctions in MARC 21. The JSC asked the Editor to make the meaning clear, e.g., "title variations on earlier or later issues or parts".

Action=Editor

137.17 2.3.5.1 Definition

137.17.1 Line 208: 2nd bullet: clarify that "other title information" may have variant forms (ALA)

Withdrawn by the ALA representative.

137.17.2 Line 209: Reword and add refs to 2.1.1.2 and 2.1.1.1 (CILIP)

Hugh Taylor said that he thought that the CILIP comment arose from similar concerns to those expressed by ALA (Line 206) and LC (Line 207). The JSC agreed it was covered.

137.18 2.3.5.3 Basic instructions on recording earlier/later titles

137.18.1 Line 213: Change caption (ALA)

Jennifer Bowen said that the original comment was related to lines 206 and 207.

137.18.2 Line 214: 1st para: add new first sentence (ALA)

Jennifer Bowen explained that ALA wanted to add this sentence; “Record major changes to the title proper as instructed in 2.3.1.11.” Barbara Tillett noted that LC agreed, but had noted in the response table a concern with the wording as only serials have major changes. The JSC agreed to the ALA suggestion as changed by LC, and to provide a reference to the appropriate instruction in chapter 7.

Action=Editor

137.18.3 Line 215: 2nd para: use "variations in title" (ALA)

Related to the ALA comment at line 207

137.19 Statement of responsibility

137.19.1 The Editor said that in the table at “Change in statement of responsibility” for Serials it said: “if the addition or deletion of, or a change to a statement of responsibility requires a change in the primary access point, create a new description; otherwise, make a note on the addition, deletion, or change if considered important.” He noted that the JSC needed to discuss what to do now that “primary access point” was no longer in RDA. He suggested that this be discussed with Part B, along with similar instructions for change in publisher. (see 5JSC/M/149.7)

137.20 2.5.0.6 Change in edition information

137.20.1 Line 272: Para a) add guidance (ALA)

Jennifer Bowen read out the ALA comment: “Guidance for recording multiple edition statements on multiple sources within the resource would also be useful when all parts of a resource are issued simultaneously with multiple edition statements.” In the response table some of the constituencies disagreed and LC questioned if this meant adding too much detail. The comment was withdrawn by ALA

137.20.2 Line 273: Para b) & c): add ref to 1.3 (ALA)

Withdrawn by the ALA representative.

137.20.3 Line 274: Change scope of a) and b) (LC)

The JSC agreed with the LC suggestion except for the deletion of “either for identification or for access”.

Action=Editor

137.21 2.7.0.7 Change in name of publisher, distributor, etc.

137.21.1 Line 312: Change caption; reword instructions to account for changed publisher etc.(LC)

The Chair noted that the table showed there was agreement with the suggested changes. The Editor noted that the instructions would be changed to treat publication, distribution, etc. separately. The JSC asked the Editor to make the appropriate changes to reflect LC’s suggestion.

Action=Editor

137.22 2.8.0.6 Change in place of publication, distribution, etc.

137.22.1 Line 327: Change wording (LC)

Barbara Tillett said that the issue was the same as that at line 312. The JSC agreed with the changes.

Action=Editor

137.23 2.9.0 Basic instructions on recording date of publication, distribution, etc.

2.9.0.2 Sources of information

137.23.1 Line 347: 4th para: Query re beginning date; add "released" (ALA)

Jennifer Bowen said that the ALA point was that many Chinese and Japanese monographic sets are released out of sequence. In such cases, the last numbered issue/part is not always the same as last released issue/part. The JSC agreed to add "released" to 2.9.0.2 4th paragraph.

Action=Editor

137.23.2 Line 348: 4th and 5th paras: change wording (LC)

Barbara Tillett explained that the LC changes were to use "multipart monographs and serials" instead of "a resource issued in successive parts" and to make it clear that information is to be taken from "the source of information for the first and/or last issue or part or from another source." For integrating resources, the focus is on the "source of information for the first and/or last iteration or from another source". The JSC agreed.

Action=Editor

137.23.3 Line 349: 5th para: Query re ending date (ALA)

Jennifer Bowen said that the ALA comments were covered by the LC change at line 348.

137.24 2.10.6.7 Separately numbered issues or parts

137.24.1 Line 403: Para a): Expand to all multipart monographs (ALA); Para a): use "multipart monograph" in the instruction (CCC)

The JSC agreed with the suggested changes.

Action=Editor

137.25 2.14.1 Issue or part used as the basis for the description of a serial or multipart monograph

137.25.1 Line 438: Keep notes on earliest and latest parts consulted separate (ALA)

The JSC agreed.

Action=Editor

137.25.2 Line 439: 1st para: add "released" (ALA)

The JSC agreed as at line 347.

Action=Editor

- 137.25.3 Line 440: Paras a) and c) Do any constituencies combine information in a single note? (CCC)

Margaret Stewart said that CCC wanted to know if any of the other constituencies followed the AACR2 provision to combine information on earliest and latest parts consulted. The JSC confirmed the decision made at Line 438 to keep the notes separate.

- 137.26 4.10.1.6 Simultaneous edition

- 137.26.1 Line 655: Add instructions for replacement volumes (New proposal) (ALA)

It was noted that the proposal had earlier been withdrawn by ALA.

- 137.27 Signalling mode of issuance

The Chair noted that at the previous meeting it had been agreed to discuss further the need to signal mode of issuance in RDA (5JSC/M/103.7.1). The Editor noted that mode of issuance was actually a concatenation of multiple characteristics. He explained that in the RDA-ONIX Framework (5JSC/Chair/10), ExtensionMode (succession or integration) is separate from RevisionMode (correction, substitution, transformation). There are also attributes for ExtensionTermination and RevisionTermination (determinate, indeterminate, not applicable) and ExtensionRequirement and RevisionRequirement (essential, inessential, not applicable). The JSC agreed that it did not want to record mode of issuance at this level of complexity. The Editor noted that you only got to the categories of “multipart monograph” and “serial” after you layered intended termination on mode of issuance. The JSC members agreed that people did want to filter searches on these terms. The Editor said that he would work on adding an element, but that it might not be ready by the internal JSC May 30 deadline for the revision of chapter 1-2, 4-5. He suggested that the element would be in chapter 2 after the element for series and before the element for frequency.

Action=Editor**138 Additions to RDA based on MARC 21 elements**

- 138.1 Received and considered the following documents:

5JSC/ACOC rep/2

5JSC/ACOC rep/2/LC response

5JSC/ACOC rep/2/BL response

5JSC/ACOC rep/2/CCC response

5JSC/ACOC rep/2/CILIP response

5JSC/ACOC rep/2/ALA response

5JSC/ACOC rep/2/ACOC response

- 138.2 The Chair reminded the JSC that, following on from a request from the JSC at the October 2006 meeting, she had prepared a proposal for four additions to RDA based on MARC 21 elements.

- 138.3 Tag 263 - Projected Publication Date

- 138.3.1 The Chair noted that none of the constituencies had been enthusiastic about including this element in RDA. She suggested that inclusion not be pursued. The JSC agreed.

138.4 Tag 507 - Scale Note for Graphic Material

138.4.1 The Chair said that all constituencies wanted to include scale for graphic materials in some form. Margaret Stewart said that CCC was unsure whether it would be a note or an element. The Chair said that the instruction was incorrectly framed as a note and perhaps it should have been an element. The Editor referred to the Scope analysis table, and said that this contained an element for scale with several element subtypes (scale of still image or three-dimensional form; scale of cartographic content; additional scale information, etc.). The Chair confirmed that this approach would meet the BL and CILIP request for a general instruction relating to scale. The JSC agreed with the general approach.

Action=Editor

138.4.2 Hugh Taylor noted that CILIP had asked whether it was intentional or desirable that the instruction could be used for any manifestation that is a facsimile of another manifestation and where the scale proportions are recorded or can be determined. The Editor replied that the answer was “no” as the instructions were to be placed in chapter 4 and dealt with the scale of the content only.

138.4.3 John Attig commented that the phrase “ratio of an image to the image ...” in the scope was not consistent with the definition in MARC 21. The JSC decided that the scope would be broadened, but that the wording needed to be clarified to something similar to: “The scale of graphic content is the proportion or ratio of an image or three-dimensional form to the entity it represents.”

Action=Editor

138.5 Tag 518 - Date/Time and Place of an Event Note

138.5.1 The Chair noted that no specific proposal had been developed, but that the constituencies had commented on the two recommendations in 5JSC/ACOC rep/2.

138.5.2 Recommendation 1: It is recommended that the Editor incorporate provision for events, such as recording and broadcast, in the revised instructions for notes on the place and date of publication, distribution, manufacture, and production.

The Chair said that there was agreement in principle with this recommendation. She suggested that the Editor work with this when revising the instructions for place and date of publication. The Editor noted that the decision had previously been made to treat the event as the element, with sub-elements for agent, location, and date. The JSC discussed the different events in the lifecycle of a resource, i.e., creation, capture, production (including manufacture), publication (including issuing, broadcasting, and releasing), and distribution.

Action=Editor

138.5.3 Recommendation 2: It is recommended that the JSC discuss whether (or when) provision for events relating to the finding of objects, naturally occurring or otherwise, be introduced to RDA.

The Chair noted that a number of the constituencies had indicated that they did not want these instructions to be included in RDA if they were covered by specialist manuals (e.g., CCO). She asked if the JSC still agreed with the following in the RDA strategic plan: “Improve the coverage of materials such as digital resources, three-dimensional objects, visual materials, manuscripts and archives”. The Chair commented that the date of finding

a three-dimensional object is a key part of describing it. The JSC discussed the issue and decided that if it could be done easily, provision for events relating to the finding of objects would be included in RDA. The Chair said that she would undertake to research the terminology.

Action=ACOC rep, Editor

The Chair asked about the suggestion from BL and CILIP that gap analysis be done with other standards. The JSC decided not to pursue this for the first release of RDA, but agreed that ideally it would be done in the future.

Action=Secretary (List of issues for consideration after first release of RDA)

138.6 Tag 524 - Preferred citation of Described Materials Note

138.6.1 The Chair noted that BL and CILIP had said in their responses that this seemed more relevant to the “obtain” user task than the “identify” user task. John Attig said that his understanding was that these citations were not used to obtain resources in the archival context. The JSC agreed with the ALA rewording of the scope to clarify the usage of “citation”. It was noted that the MARC 21 definition only referred to the custodian of the resource, and the proposed scope expanded this to “creator, publisher, or custodian, etc.”. The JSC agreed to expand the scope, and to include “indexing and abstracting services” before the “etc.”. The JSC also agreed with the suggestion to record the authority for the citation. The Editor noted that this was in the category of “data about data”. The JSC referred the comments on the examples in the proposal to the Examples Group.

Action=Editor; Examples Group 1

139 Numbering for serials: alternative instruction

139.1 Received and considered the following documents:

5JSC/LC/10

5JSC/LC/10/ALA response

5JSC/LC/10/CCC response

5JSC/LC/10/BL response

5JSC/LC/10/CILIP response

5JSC/LC/10/ACOC response

139.2 The Chair noted that ACOC, BL, and CILIP had all questioned the need to move information on numbering for serials to a note in order to avoid a display problem. She added that they had also suggested that the beginning and ending date be recorded in separate elements. The Editor explained that in the Scope analysis table that he had prepared, there were separate element sub-types for: numeric and/or alphabetic designation of first issue or part; chronological designation of first issue or part; numeric and/or alphabetic designation of last issue or part; and, chronological designation of last issue or part. He added that keeping these sub-types separate would allow you to generate a customized display, including text such as “Began with” if this is desired. The Editor said that this would result in better structured metadata, and there would be no need to record punctuation such as hyphens and parentheses. The JSC agreed with this approach.

Action=Editor

139.3 Jennifer Bowen said that it would be important to communicate how the element sub-types would display together, perhaps by having an example in ISBD format. The Editor suggested that this could be included in the appendix of full examples. The JSC agreed,

and noted this as a task for the Examples Group. The Chair said that this was another issue to discuss with MARBI.

Action=Examples Group 1; Secretary (MARC 21 implications)

- 139.4 The Chair asked what the other constituencies thought of the ACOC suggestion to supply the numbering if it can be readily ascertained, even if the description is not based on the first/last part. The JSC agreed. Alan Danskin asked if the source of the numbering would need to be recorded in a note. The Editor said that this fell into the category of “data about data”.

Action=Editor

140 Analysis of the proposed CONSER standard record vis à vis RDA

- 140.1 Received and considered the following document:
5JSC/Editor/1

- 140.2 The JSC discussed whether to make a response to the proposed CONSER standard record. The JSC decided not to comment for the following reasons: RDA is an evolving standard, and to make a decision now could pre-empt future decisions; the CONSER standard record is based on AACR2 practice, and amongst other issues, the JSC has yet to consider all of the implications of the transition from uniform titles to names of works and expressions. The Chair said that she would draft an email along these lines in time for the CONSER Operations Committee meeting at the beginning of May 2007. The JSC agreed that the most appropriate channel to communicate this would be via the ALA representative to the JSC. The JSC decided as a matter of policy not to respond to any requests of this kind while RDA is being developed and the text is still in draft.

Action=Chair; ALA representative

- 140.3 The JSC noted that there were a number of issues raised by the CONSER standard record that it would be beneficial for the JSC to discuss. The Chair said that she (along with the Secretary) would prepare a document to facilitate discussion at the October 2007 meeting.

Action=Chair and Secretary

141 Sources of information

- 141.1 Received and considered the following document:
5JSC/Editor/RDA/Part A/Sources of information

- 141.2 The Chair noted that the JSC had held a teleconference on 21 February (22 February in Australia) 2007 to discuss sources of information. She added that the JSC had before them a summary document containing notes from the teleconference, with comments from subsequent email messages inserted. The teleconference was structured around questions in a discussion guide prepared by the Editor (5JSC/Editor/RDA/Part A/Sources of information). The Editor noted that the discussion guide was based on constituency responses to the instructions on sources of information in the December 2005 draft of RDA part I. [The minutes below include extracts from the summary document.]

- 141.3 **Discussion guide question 1:** Should the guidelines on choosing a preferred source of information be treated as general guidelines for purposes of identifying the resource being described, or should they be presented only as guidelines on choosing the preferred source of information for the title proper?

- 141.3.1 At the teleconference the JSC agreed that the guidelines should be presented as general guidelines. The guidelines in 2.2.1.0.2 should make it clear that the source chosen as the preferred source should include the title proper, as it is an essential part of the “information required for the identification of the resource”. After the teleconference the LC representative prepared revised wording for 2.2.1.0, 2.3.0.2, and 2.3.5.2.
- 141.3.2 **Subsequent issues Q1.1:** Does the concept of preferred sources apply to data elements that are not expected to be transcribed?
- 141.3.3 John Attig (the originator of the question) said that he was satisfied with the Editor’s email comment: “The instructions on preferred sources of information all refer to sources from which "information" is to be taken. That does not presume that the "information" will be recorded in the form in which it appears (i.e., that it will be transcribed). As it happens, the specific instructions on sources of information given under those elements that are not transcribed generally override (or partially override) the general instructions on preferred sources. In some cases (e.g., date of publication, etc.), the overriding instructions give preference to the source from which the title proper is taken. In other cases (e.g., frequency), the overriding instructions allow the information to be taken from any source. That does not mean, however, that the concept of preferred sources has no relevance for elements that are not transcribed.”
- 141.3.4 **Subsequent issue Q1.2:** Does the JSC support the suggested changes to wording supplied by LC?
- 141.3.5 Margaret Stewart said that she did not think that the reference added at 2.2.1.0.3 (“If the resource bears no title itself and has no title associated with it that can be found in other sources, devise a title as instructed in 2.3.7.”) was appropriate to include in the general guidelines. The JSC agreed that 2.2.1.0.3 would not be included in the draft.
- 141.3.6 John Attig asked whether in cases where there is no title proper you would be able to pick a preferred source of information. The Editor said that he had some issues with bringing the title proper into how you choose the preferred source. He added that the problem is that the current instructions on choosing the title proper referred you to what is on the preferred source of information. The JSC discussed how to ensure that the instructions are not circular. The Editor noted that the general guidelines at 2.2.1.0 are directional, and that there were references to the type of description at 2.1, and specific instructions based on the presentation format of the resource at 2.2.1.1-2.2.1.4. Jennifer Bowen commented that the original problem that the JSC was trying to solve was to avoid someone selecting a preferred source of information that did not have a title on it. The Editor said that even if the resource did not have a title there still needed to be a preferred source. The Editor noted that for resources consisting of multiple pages or leaves the preferred source was the title page, and for resources consisting of moving images it was the title frame(s) or title screen(s). He added that there was only an issue if there was no source that by definition bore a title, in which case there was a choice between a list of sources. He suggested that it could be made clear that you would choose the first of these sources which had a title. The JSC asked the Editor to redraft the appropriate instructions at 2.2.1 to say “use as the preferred source of information, the first of the following sources which bears the title”. The JSC agreed that the general guidelines at 2.2.1.0 would not contain any reference to the title proper.
- Action=Editor**

141.3.7 The JSC discussed the change that LC had made at 2.2.1.2.3 and 2.2.1.3.1 from "... a label permanently printed on or affixed to ..." to "... a label permanently printed on it that is affixed to" The JSC decided not to make this change as the existing wording is clear.

141.3.8 The JSC discussed the suggested changes made by LC to 2.3.0.2 (sources of information for titles). The first change was to 2.3.0.2 a) to read "a) For the title proper, use the first preferred source of information (as specified in 2.2.1) containing the title proper." The Chair noted that "containing the title proper" would not be included based on the previous discussion. The JSC agreed with the Editor that "first" would not be included as this summarised the rule that was being referred to. Barbara Tillett asked if there needed to be a reference to 2.2.2 (More than one preferred source of information). The Editor said that he would ensure that there was a reference at 2.2.1 to 2.2.2.

Action=Editor

141.3.9 The JSC discussed the following addition to 2.3.0.2 suggested by LC: "d) For earlier and later titles proper, use the first preferred source of information (as specified in 2.2.1) containing the title proper". The Editor agreed that this instruction had been missing from the draft, but that it would be edited to match what had been removed from 2.3.0.2 a). The JSC decided that 2.3.0.2 e) would not contain any reference to earlier and later titles.

Action=Editor

141.3.10 The Editor noted that the LC suggested revision to 2.3.5.2 (sources of information for earlier/later title) contained a reference back to 2.3.0.2, which is problematic as this is a summary of the guidelines. The JSC asked the Editor to provide whatever references and explanatory text are needed.

Action=Editor

141.4 **Discussion guide question 2:** If it is appropriate to apply the guidelines on choosing a "preferred source of information" to elements other than just the title proper, should they apply to all elements covered in chapter 2, or only to specified elements?

141.4.1 At the teleconference the JSC agreed that:

(1) we provide general instructions, (2) that specific instructions for specific elements, where given, would override the general instructions, and (3) if there are no specific instructions for an element, the general instructions apply.

The JSC did not agree with the following paragraph in the Discussion guide on sources of information: "There are also explicit overriding instructions under sources of information for earlier/later title, specifying sources of information on earlier iterations and later issues or parts. The assumption is that an earlier/later title may be taken from any source within an earlier iteration or later issue or part. If that assumption is valid, it should probably be clearly stated."

An earlier/later title cannot be taken from any source, but from the same source as the title per 2.3.0.2. Earlier/later titles also include parallel titles.

The JSC request that the Editor revise the text accordingly.

Action=Editor

141.4.2 **Subsequent issue Q.2.1:** What distinctions need to be made between titles proper, parallel titles, and other title information, in the instructions on choosing a source for earlier/later titles?

141.4.3 This was discussed during the review of the LC draft wording at 2.3.0.2.

141.5 **Discussion guide question 3:** Should accompanying material be treated as part of the “resource itself” for purposes of defining sources of information for identification of the resource?

141.5.1 The Chair noted that there were no subsequent issues to discuss as a result of the decisions made at the teleconference:

The JSC agreed that both possibilities outlined in the first paragraph under "Factors to be considered" in the Discussion guide on sources of information should be allowed, i.e.

... "accompanying material" ... could be viewed either as part of the resource (if the description is viewed as a comprehensive description of the resource as a whole, and the accompanying material is treated as a component of the resource) or as a related resource (if the description is viewed as an analytic description of the principal component(s) of the resource, and the accompanying material is treated as a related resource).

The JSC request that the Editor include a paragraph which explains both possibilities, using wording like that given above. The JSC preferred that this information be given in the body of the instruction rather than in a footnote.

Action=Editor

141.6 **Discussion guide question 4:** Should a container be treated as part of the “resource itself” for purposes of defining sources of information for identification of the resource?

141.6.1 At the teleconference it was decided that:

The JSC wanted to allow the possibility of using the container as a source. For example if an item in a container which is being described separately (analytically) does not carry identifying information, then the container should be able to be used as a source.

The JSC request that the Editor suggest wording to cover this situation. It was noted that similar situations might also arise in relation to accompanying material.

Action=Editor

141.6.2 The Editor said that this was covered by the draft wording already in the discussion guide. John Attig said that there had been a concern within ALA that for certain types of material the typical source of information will be the container, and that they would prefer not to have to note the source of the title proper in each of these cases, or include the title in square brackets. The Editor said that in cases where the container is typical for that type of material it would be considered part of the resource itself, and no square brackets would be used.

141.7 **Discussion guide question 5:** Should the term “formally presented” be defined?

141.7.1 From the teleconference notes:

The JSC agreed that a definition would be useful, and suggested the following definitions (based on LC's revision of the ACOC suggestion):

Formally presented: Text in a prominent location appearing in isolation as opposed to appearing within other text.

Text for 2.2.1.3.3 and 2.2.1.4.1: “metadata embedded in textual form”

141.7.2 **Subsequent issue Q.5.1:** Should the text for 2.2.1.3.3 and 2.2.1.4.1 be "embedded metadata in textual form" or "metadata embedded in textual form"?

141.7.3 Hugh Taylor noted that the two phrases had different meanings. The JSC agreed to use “embedded metadata in textual form” as found in the draft instructions in the discussion guide.

141.7.4 **Subsequent issue Q.5.2:** Would “Information in a prominent location appearing in isolation as opposed to appearing within other text” be preferable to “Text in a prominent location appearing in isolation as opposed to appearing within other text.”?

141.7.5 The JSC agreed with this suggestion from the Editor.

Action=Glossary Editor

141.8 **Discussion guide question 6:** Should resources consisting of a single page or leaf (or an image of a single page or leaf) be included in the same category as resources consisting of multiple pages or leaves (or images of multiple pages or leaves)?

141.9 From the teleconference notes:

The JSC agreed that they should be treated in the same category, and suggested the following:

Change the caption to:

2.2.1.1 Resources consisting of ~~multiple~~ pages or leaves (or images of ~~multiple~~ pages or leaves)

Change the first sentence along the following lines (note: this includes changes as suggested in response to Q. 8 below):

2.2.1.1.1

For a resource consisting of pages or leaves (e.g., a book or an issue of a periodical, a sheet map) or images of pages or leaves (e.g., a microform reproduction of a musical score, a PDF file of a text, or a JPEG image of a broadside), use the title page, sheet or card (or its image) as the preferred source of information.

Delete the final sentence:

~~*For a resource consisting of a single page or leaf, or a single page or leaf image (e.g., a sheet map or a JPEG image of a broadside), follow the instructions given under 2.2.1.4.*~~

Action=Editor

141.9.1 The Chair noted that in the subsequent email comments Hugh Taylor had said that the suggested wording for 2.2.1.1.1 is awkward. Also the Editor had noted that further revisions may be needed to cover ‘one or more pages or leaves’; to cover single sheets,

cards etc.; and to remove “broadside” from the parenthetical example. The JSC asked the Editor to try to edit the instruction so that it covered multiple categories.

Action=Editor

141.10 **Discussion guide question 7:** Should the term “title page” be defined to include more than one page?

141.10.1 The Chair noted that at the teleconference the JSC had agreed that the title page should be defined to include more than one page (i.e., retain the AACR2 concept), but that the Editor had a number of subsequent questions. The Editor said that the JSC needed to decide which of the following (originating from different places in AACR2) would be included in the definition: (1) both recto and verso of the leaf bearing the page on which the title proper appears; (2) facing pages on which the information traditionally given on the title page appears; (3) pages on successive leaves bearing the information traditionally given on the title page. The JSC decided to include (2) and (3) in the definition of “title page”.

Action=Glossary Editor

141.11 **Discussion guide question 8:** Is a separate set of instructions for resources consisting of a set of graphic images necessary?

141.11.1 The Chair noted that there were no subsequent issues to discuss as a result of the decisions made at the teleconference:

The JSC agreed that they did not want to lose the possibility of using the title sheet as a source; but would prefer a general instruction if possible.

It was agreed that this could be accomplished by saying “use the title page, sheet or card” in the general instruction. JSC supported the revised instruction for 2.2.1.1.1 as given above.

Action=Editor

141.12 **Discussion guide question 9:** Should a separate set of instructions be added for resources consisting of sound?

141.12.1 The Chair commented that it had been agreed at the teleconference that these instructions would not be needed, but that the Editor had some follow-up questions. The Editor said that if there were no separate instructions for resources consisting of sound, these resources would be covered by the instructions for “other resources”. Jennifer Bowen said that it was important to include in these instructions the instruction to prefer the use of eye-readable information, as this had been a significant part of the original ALA suggestion for resources consisting of sound. The Chair noted that the JSC had discussed this under question 10 at the teleconference and agreed. The Editor commented that the “other” category would not cover everything that had been in the original ALA suggestion. The Chair suggested that the JSC look at what the Editor was going to draft and see if the ALA concerns had been addressed. The JSC agreed.

Action=Editor; JSC

141.13 **Discussion guide question 10:** Should the instructions on other resources be simplified to give preference to the source of formally presented information within the resource itself that provides the most complete information?

141.13.1 From the teleconference notes:

The JSC agreed that they did not want to require the cataloguer to ‘open’ every resource to find the source with the most complete information, but to prefer the use of eye-readable information. This issue arose with all resources that require equipment to view.

The JSC discussed whether this was best given as a general instruction in 2.2.1.0, or in the individual instructions under 2.2.1.1, 2.2.1.3, and 2.2.1.4. It was noted that this may depend on how cataloguers use the RDA product.

The JSC requested that the Editor use his judgement regarding the most appropriate placement of the instructions.

Action=Editor

- 141.14 **Discussion guide question 11:** Should the rewording of the instructions on sources of information in different languages or scripts follow the wording recommended in 5JSC/LC/5/Rev or the wording recommended in 5JSC/RDA/Part I/LC response?

- 141.14.1 The Chair confirmed that the decision made at the teleconference was clear to the Editor:

The JSC agreed to use the wording given in 5JSC/LC/5/Rev, including “iv) the first occurring of the sources”. CCC withdrew their earlier objection to this.

Action=Editor

- 141.15 **Discussion guide question 12:** Are the general guidelines on other sources of information applicable to all elements covered in chapter 2 or only to certain elements?

- 141.15.1 The Chair confirmed that the decision made at the teleconference was clear to the Editor:

The JSC noted that this question was similar to that asked in question 2, although that related to “preferred” sources, whereas this related to “other” sources. The JSC agreed that the same principle should apply in both cases.

Action=Editor

- 141.16 **Discussion guide question 13:** Is the convention of bracketing information taken from outside the resource appropriate in the RDA context?

- 141.16.1 From the notes on the teleconference:

The JSC noted that square brackets were a useful shorthand way of communicating this information, and that the records should not be cluttered up with too much metadata about the metadata. However it was noted that square brackets were not necessarily understood by catalogue users.

On balance, the JSC agreed to revise the instructions at 2.2.4.1, along the following lines: "Indicate if information taken from outside the resource itself is used in any of the following elements:"

An instruction should be provided to the effect that "indicate" means this information can be given by appropriate coding, by using the existing convention of square brackets, or in a note “if considered important for identification or selection”. Examples could show a variety of approaches, with explanatory text provided under each.

The JSC further noted that, now that square brackets are only used when information has been taken from outside the resource itself, this situation will arise much less frequently.

The JSC would appreciate it if the Editorial team could provide further information on this.

Action=Editor; Editorial Team; Examples Group 1

141.16.2 The Chair noted that discussion on punctuation instructions had been deferred until responses to the questions in the cover letter to chapter 3 had been received.

Action=JSC (Punctuation)

141.17 The JSC did not discuss the comments in the part I response table to do with sources of information. The JSC members agreed to review their constituency suggestions after seeing revised draft text from the Editor and bring forward any concerns that had not been dealt with.

Action=JSC

Executive Session 2

142 Communication with other resource description communities (continued)

142.1 [Note: included in 5JSC/M/Restricted/129-169.]

143 RDA Project plans

143.1 [Note: included in 5JSC/M/Restricted/129-169.]

144 Risk assessment for RDA content development

144.1 [Note: included in 5JSC/M/Restricted/129-169.]

End of Executive Session 2

Executive Session 3

145 Joint meeting with the Committee of Principals

145.1 Received and considered the following documents:
5JSC/Annual report/2006

5JSC/Strategic/1/Rev

145.2 [Note: included in 5JSC/M/Restricted/129-169.]

End of Executive Session 3

146 Editor's draft of RDA chapters 6-7

146.1 Received and considered the following documents:

5JSC/Editor/RDA/Part A/Chapter 6/Rev

5JSC/Editor/RDA/Part A/Chapter 7/Rev

5JSC/Editor/2

5JSC/RDA/Prospectus/Rev/3

5JSC/RDA/Part A/Chapters 6-7

5JSC/RDA/Part A/Chapters 6-7/Chair follow-up/1

5JSC/RDA/Part A/Chapters 6-7/Chair follow-up/2

5JSC/RDA/Part A/Chapters 6-7/Chair follow-up/3

5JSC/RDA/Part A/Chapters 6-7/Chair follow-up/4

5JSC/RDA/Part A/Chapters 6-7/Chair follow-up/5

5JSC/RDA/Part A/Chapters 6-7/LC response

5JSC/RDA/Part A/Chapters 6-7/CCC response

5JSC/RDA/Part A/Chapters 6-7/BL response

5JSC/RDA/Part A/Chapters 6-7/ACOC response

5JSC/RDA/Part A/Chapters 6-7/ALA response

5JSC/RDA/Part A/Chapters 6-7/CILIP response

146.2 Chapter 6 - Structure

146.2.1 The Editor explained that in the draft he had prepared for the JSC in March 2007, he had incorporated the major decisions from the October 2006 meeting. The order of chapters 6 and 7 was reversed, and all instructions on determining the primary access point had been removed from the chapter. The Editor said that he had regrouped the instructions and examples formerly in sections 7.2-7.5 into four sections to parallel the four broad categories of relationships between group 1 and group 2 entities in FRBR. The first grouping is for access points for creators and contributors of content. The Editor explained that there was too fine a line between works and expressions to make a distinction between them. The second grouping is for access points for other persons, families, and corporate bodies associated with the content of the resource. This grouping is not represented in FRBR, as it covers people/bodies to whom a work is attributed, or who are associated with a resource (FRBR covers creation of the work and realization of the expression). The third grouping on access points for producers, publishers, etc. is at the manifestation level. The fourth grouping, access points for owners, custodians, etc. relates to items.

146.2.2 The Editor noted that the separate instructions for musical works and art works had been removed, and the examples moved into the appropriate general instruction in the section on access points for creators and contributors of content. He added that the instructions for legal works, religious works, official communications, and academic disputations had been retained as separate sections. He commented that if these instructions had been rolled into a general section most would have been moved into the section on other persons, families, and corporate bodies associated with the content of the resource.

146.2.3 Hugh Taylor said that he was trying to visualise how people would get to the right section in the online version. The Editor suggested that people would approach RDA with the role

in mind and would find the appropriate instructions by using the index or keyword searches. He added that it would also be possible to filter by category of work. John Attig said that he thought that the current position of the instructions on designation of role could mean that they were not found easily. The JSC discussed designation of role, and agreed to make the instructions more prominent, and move them after the general instructions. The Editor suggested that designation of role could be seen as “data about data” as it was not an attribute of the resource, or of the person, family, or body, but an attribute of the relationship between the person, family, or body and the resource. Barbara Tillett said that she did not think it was “data about data”, as it was telling you what the relationship is. The JSC agreed that designation of role would be conceptualised as an attribute of the relationship, and for that reason placed in the chapter on relationships. The Editor said that when the instructions moved to the front of the chapter at 6.2, they would no longer instruct to “add” a designation of role, but to “record” it.

Action=Editor

146.3 Required access points

- 146.3.1 The Editor said that he had followed the decision made at the April 2006 meeting to label all elements. He added that in doing this he was conscious that the responses to 5JSC/ACOC rep/1 relating to chapter 6 had not been discussed. John Attig said that when he saw the label “required as applicable” at the element for creators, this implied to him that all of the creators were required, and it needed to be indicated clearly that it was limited to the first named. The Editor explained that in his definition of creator it only applied to one. John Attig noted that there was the same issue for collaborators. The Chair suggested that the JSC return to the issue once all definitions and categorizations were in place (see 5JSC/M/159.6).

146.4 Role designations

- 146.4.1 The Editor said that in comments on 7.6.2 in the June 2006 draft at least one constituency had suggested that RDA should incorporate a list of role designations. The Chair said that ACOC thought that if RDA is content standard it should provide the values to record. The JSC discussed the issue. It was noted that if RDA did include a list there would need to be an alternative to use an existing list. The Editor added that in this case there would have to be an indication of which list was being used. The JSC discussed the list of MARC 21 relator codes, and it was noted that this list was not “clean” as it contained both general and specific roles that were mutually contradictory. Alan Danskin said that one recommendation arising from the follow-up meeting on the RDA/ONIX Framework was that: “There are other sets of controlled vocabularies within RDA (for example, “Relator” and Audience codes) which may benefit from the same analytic approach as content and carrier categories.”
- 146.4.2 The Editor noted that the element subtypes in the chapter were in effect high-level role designators. He later added that it would be refinements on these roles which would be included in the list. The JSC agreed to include a list of role designations in RDA. Two possible collaborators in this work are the MARC 21 and ONIX communities. Barbara Tillett said that LC would prepare a “starter” list of designations for JSC discussion in preparation for the release of the revised draft of chapter 6 in June. The Chair asked LC to highlight any issues raised as part of the process and the future steps. The JSC agreed that the list of role designations would be included in an appendix, and there would be an alternative to use a standard list.

Action=Secretary (MARC implications); LC

146.4.3 The Editor said that an issue in terms of designation of role is how the element subtypes in RDA are defined. He added that there was a significant difference between the AACR2 definitions of “personal author” (used as the basis for the RDA definition of “creator”) and “collaborator”, and the MARC 21 relator codes for “creator” and “collaborator”. Barbara Tillett said that she thought that creators and collaborators were both responsible for creation of the work. The Chair said that ACOC also did not want the separation between creators and collaborators. It was noted that it was the act of creation that was significant, not the number of people involved. The JSC agreed not to have a separate element subtype for collaborators.

Action=Editor

146.4.4 The Editor asked if there were any other comments on the element subtypes. Barbara Tillett said that the list of subtypes was very text based. The Chair said that ACOC had suggested that if the end result was the same (i.e., an access point), that there should just be one general instruction. She added that ACOC wanted less distinction between roles, although the roles did need to be understood. The Editor confirmed that there would still be the same broad divisions i.e., “Access points for creators and contributors of content”, “Access points for other persons, families, and corporate bodies associated with the content of the resource”, “Access points for producers, publishers, etc.”, “Access points for owners, custodians, etc.”. The JSC decided that there would be only two element subtypes in the first section: creators and contributors. The JSC discussed the best way to give an indication in the text of the types of roles that are contributors. The JSC decided that, under the general instruction, headings for the roles would be given with examples under each. The Editor pointed out that there was another list of roles in the section on “other contributors”. The JSC agreed that examples for these roles would be useful.

Action=Editor; Examples Group 2

146.4.5 The Editor said that he was not sure where the examples on originating bodies and issuing bodies would fit. He added that under the AACR2 rules these bodies would have been the main entry. Barbara Tillett noted that the scope for the instruction included sponsoring bodies, and these were very different from issuing bodies, as the responsibility was often purely financial. The Editor suggested that the sub-element could be “Authorising bodies”, and that these would be distinct from issuing bodies. He added that this meant that in 6.3 there would be three sub-elements: creators, contributors, and authorising bodies. The JSC agreed.

Action=Editor

146.4.6 The Editor asked where the instructions on “persons, families, and corporate bodies associated with later parts, issues, or iterations” would fit in the reconceived section. Judy Kuhagen noted that LC had considered proposing that the instructions be deleted. The JSC agreed to delete the instructions.

Action=Editor

146.4.7 The JSC decided that there did not need to be a separate sub-element for “Persons, families, and corporate bodies to whom a work has been attributed”, and that the examples would be included under this heading in the “creator” sub-element.

Action=Editor

146.4.8 The JSC discussed the instruction “For serials and integrating resource, provide an access point for an editor only if considered important for access.” The JSC decided that the instruction would be deleted. Judy Kuhagen asked if the general instruction would allow cataloguers not to give an access point for an editor. The JSC decided that this would be

covered as access points for contributors would be optional, and that only creators would be “required if applicable”. The JSC decided to defer discussion on whether an access point for authorising bodies would be required until later in the meeting (see 5JSC/M/159.6).

Action=Editor

- 146.4.9 John Attig said that he was concerned about the use of “producer” in “Access points for producers, publishers, etc.” as the term has so many meanings. The Editor noted that “production” would be an event, and that the agent for the event would be the producer. The JSC discussed the best way to make the meaning of “producer” clear, and agreed that the scope would specify that these instructions apply to manifestations. In the same way, it will be explicit that the section on access points for creators and contributors applies to works and expressions, and that the instructions on access points for owners and custodians apply to items.

Action=Editor

- 146.4.10 The JSC discussed the instructions for access points for persons and corporate bodies associated with legal works, religious works, and official communications; and which roles would be labelled as required. The Editor commented that in very few cases were the persons or corporate bodies involved creators or contributors. He added that there were currently footnotes in the instructions on legal works to specify when an access point is required, and these matched situations that in AACR2 have corporate body main entry. The JSC decided not to do any rationalization of the special instructions because there had been a strong recommendation in the past from ALA that all special rules be kept in one place. It was also decided that access points for roles described in the special instructions would be optional. It was noted that this was possible because these instructions were separate from the instructions on naming the work in chapter 13. The JSC agreed this needed to be made clear in the covering letter. The Chair noted that the previous unsuccessful exercise to simplify the special rules was done without the benefit of compressed general instructions, and there could be different reactions to this draft.

Action=Editor; Secretary (Cover letter)

- 146.5 Change in responsibility

- 146.5.1 The Editor noted that the instructions on change in responsibility had been revised to reflect the elimination of the distinction between primary and additional access points. Barbara Tillett circulated suggested changes to the instructions. The JSC agreed with the changes, including accepting that it did not need to be explicitly stated that existing access points for earlier parts/issues/iterations are to be retained. The Editor said that he would ensure that the wording was consistent with the rest of the chapter.

Action=Editor

- 146.6 Examples

- 146.6.1 The Editor said that the JSC had received a report from Examples Group 2 detailing alternatives for the form of examples. He added that he was concerned about the option to have examples that do not show the element that is the subject of the instruction. He noted that writers of other content standards (e.g., CCO) did not seem to mind giving the access point as an example. The JSC deferred making a decision until after the discussion of chapter 7 (see 5JSC/M/146.11).

- 146.7 Chapter 7 (Related Resources) – Structure

- 146.7.1 The Editor explained that the chapter had been organised by the taxonomy of relationship types developed by Tillett, as this was the structure preferred by the majority of the JSC members. He added that, in line with the decision at the October 2006 meeting, within each broad relationship type, relationship subtypes were defined with reference to the specific FRBR entity or entities involved (i.e., work, expression, manifestation, or item). A number of problematic terms, “citation”, “access point”, “embedded description” and “informal reference” had been removed. The JSC members affirmed that they were pleased that these terms were no longer being used. The Editor said that all references to the use of “coded values” as a means of indicating the nature of the relationship had been deleted. He noted that in response to ALA comments on the June 2006 draft, there was now a section on FRBR primary relationships. He added that the instructions for music resources, art resources and legal resources had been eliminated, and the examples relocated.
- 146.7.2 John Attig noted that there were no instructions on shared characteristics. The Editor said that he thought it had been agreed not to include these as there was not a relationship, there was only a common value in two or more descriptions.
- 146.8 Required relationships
- 146.8.1 The Editor explained that all relationships other than the primary relationship between a work, expression, manifestation, and item had been provisionally designated as optional. He added that this reflected what was in ACOC/rep/1 but had not yet been discussed. He noted that making the relationship to the work required was different from AACR2 in which uniform titles are optional. The Chair said that it was required because recording the relationship was essential to fulfil an FRBR user task. The Editor noted that in the IME ICC draft *Statement*, the uniform title is listed as “indispensable”.
- 146.8.2 John Attig noted that the techniques for recording relationships between resources were labelled as optional. The Editor said that he was conscious of the ALA comment that it should be the element which is required, not the relationship. John Attig said that he could see that the requirement had to be specific to the relationship, and you could not require the data element without this. The Editor said that he would remove the “optional” labels from the instructions on the techniques as these were general guidelines.
Action=Editor
- 146.8.3 John Attig said that in several places in the draft he was happy to see the distinction made between linked records and controlled access points. The Editor said that he was trying to reflect what was in the implementation scenarios (5JSC/Editor/2). The Chair commented that Examples Group 2 had struggled with the instructions on the composite record. The Editor noted that these are the type of record that people are used to, and correspond to the third of the implementation scenarios (flat file database structure). Barbara Tillett said that she was pleased that the instructions on linked records did not specify whether these were bibliographic records or authority records, as this left it open for future possibilities. The JSC agreed to make clear how the chapter relates to the implementation scenarios clear in the cover letter of the draft.
Action=Secretary (Cover letter)
- 146.9 Designating relationship type
- 146.9.1 The Editor noted that in the Scope analysis he had included “designation of relationship” as a refinement to parallel the inclusion of “designation of role” in chapter 6. He said that

in the revised draft, de facto designations of relationship type had been used to organise the instructions under each type of relationship. He noted that in some cases these were different from the taxonomy used in MARC 21 and Dublin Core. He added that relationship designators would assist in mapping to other standards. The JSC decided that the instructions on designation of relationship would be included after the general instructions, to parallel the approach taken for role designators in chapter 6. John Attig volunteered to prepare a starter list of relationship designators for JSC comment.

Action=John Attig; Secretary (MARC implications)

146.10 “Orphan” relationships

146.10.1 The Editor explained that “orphan” relationships were those that did not have a place, either because of their definition, or because they did not fit with the taxonomy. He noted that under accompanying relationships, “accompanying manifestation (or item)” had been defined to parallel the AACR2 definition of “accompanying material”: “a manifestation (or item) that is issued with and intended to be used with the resource being described”. Barbara Tillett suggested that “intended to be used with” was not required. After discussion, The JSC agreed. The Editor suggested that the definition for “accompanying material” would need to parallel that for “accompanying manifestation”.

Action=Editor; Glossary Editor (definition of “accompanying material”)

146.10.2 The Editor said that there was also the issue of “bound with” resources that were excluded by the existing definition of “accompanying manifestation (or item)”, because they were not “issued with” the item, but bound together after the fact. This information might be needed to fulfil FRBR “obtain”. The JSC agreed that it wanted “bound with” resources to be covered in the section on accompanying manifestation (or item).

Action=Editor

146.11 Examples

146.11.1 The Chair explained that she had asked Examples Group 2 to prepare a paper that listed alternatives for the form of examples in chapters 6-7. She noted that the draft before the JSC had examples in the form of an access point. She added that there were concerns about this because the instructions for creating access points were in Part B, and the form of the access point in an example could vary between different authority files. The Chair said that Examples Group 2 had presented 5 different options for examples in chapter 6, all beginning with “Access point for”.

146.11.2 The JSC discussed the options presented by Examples Group 2. Some of the JSC members expressed a preference for option 4: “Statements that name the entities along with an indication of the resource being described for which the access points are being made.” The Editor said that his concern was that elsewhere in RDA the example contained the data element you had just been instructed to record. For this reason, JSC decided to keep the examples in the form of an access point. The Editor suggested that in the interests of good metadata, there should be separate elements in Part B for birth dates, death dates and other additions to names. The JSC agreed to consider this (see 5JSC/M/147.8.2). The JSC agreed that the introduction to Part A will make it clear that construction of the access points is to be done according to the instructions in Part B.

Action=Editor

146.11.3 The JSC asked the Chair to communicate the decision to Examples Group 2. The JSC decided to include in the cover letter for the revised chapters 6-7 details of the different

options for the form of examples prepared by the Group, and to indicate those preferred by the JSC.

Action=Chair; Secretary (Cover letter)

146.12 Constituency comments on Chapters 6-7

146.12.1 The JSC decided not to discuss in detail the constituency comments on the June 2006 draft of chapters 6-7 as many of them were superseded by the decisions made at the current meeting or the October 2006 meeting. The Chair said that she would work with the Secretary to answer the questions posed in the responses from other rule makers.

Action=Chair and Secretary

147 Draft of RDA Part B - Access Point Control (including Revised draft statement of objectives and principles for RDA)

147.1 Received and considered the following documents:
5JSC/Editor/RDA/Part B

5JSC/Editor/RDA/Objectives and Principles/Rev/3

147.2 The Chair noted that there were a number of papers to be discussed in relation to Part B, including a draft from the Editor that had only been seen by the JSC. The Editor commented that in preparing the draft he had come across special characters used in transliteration (which came from AACR2) that he was unable to represent. He added that the co-publishers were aware of the issue, and he was hopeful they would have a solution. He noted that the problem characters had been shaded in the draft, and this would need to be made clear when it eventually went out for constituency review in December 2007.

Action=Secretary (Cover letter for Part B)

147.3 The Editor led a discussion of the numbered issues in the cover letter of the draft of Part B.

147.4 1. Scope

147.4.1 The Editor explained that FRAD was the underlying model for Part B. The Chair noted that a new draft of FRAD had just been issued for worldwide review. Barbara Tillett said that the use of "controlled access point" in FRAD was causing some controversy as it covered both the authorized and variant forms of a name. The Editor noted that in the draft of Part B he had used the term "preferred access point" for the authorized form.

147.5 2. Relationship to other standards for access point control

147.5.1 The Chair noted that it had been agreed at the October 2006 meeting that a list of other standards and tools would be maintained as a wiki on the JSC Web site (5JSC/M/117.2). The Editor said that there would be a reference to the wiki at 0.2.1.3.

Action=Editor

147.6 3. Functional objectives and principles of access point control

147.6.1 The Editor explained that this section of the draft paralleled the latest version of the objectives and principles. He said he was aware that the JSC had yet to discuss the additions made to the objectives and principles document (5JSC/Editor/RDA/Objectives and Principles/Rev/3) for Part B. He suggested that Barbara Tillett highlight the changes

in the latest IME ICC draft *Statement* so that the JSC could see if any changes were needed to the objectives and principles.

- 147.6.2 Barbara Tillett referred to “Approved Draft Based on Responses through April 6, 2007 showing additional recommended changes from IME ICC4 participants, Seoul, Korea, March 6, 2007 not yet approved – clean copy”. She noted that as previously mentioned there was some controversy regarding 5.2 “Forms of controlled access points”. Another area of controversy was at 5.2.4.1 (Forms of Uniform title), although the intent was the same as in earlier drafts of the *Statement*. She noted that the latest group of participants had removed the “year (s) of publication or issuance” from the list of indispensable access points, but that this was still under discussion.
- 147.6.3 The Editor explained that in the Objectives and Principles document under “Responsiveness to User Needs” there were three objectives which originated with FRAD, but were not in the IME ICC *Statement*:
- *clarify* the relationship between two or more entities represented by controlled access points;
 - *clarify* the relationship between the entity represented by a controlled access point and a name by which that entity is known (e.g., name used in religion versus secular name);
 - *understand* why a particular name or title, or form of name or title, has been chosen as the basis for a controlled access point.

He added that he had used different terminology to that in FRAD, which has “contextualise” instead of “clarify” and “justify” instead of “understand”. The Chair confirmed that the JSC agreed with the use of the terms suggested by the Editor.

- 147.6.4 The Editor said that the text for the principle of “Representation” was his attempt to capture what was in section 5 of the IME ICC *Statement*. He said that the JSC needed to review this to ensure that the two were in synch with each other.

Representation

The descriptive data should reflect the resource’s representation of itself.

The name or form of name designated as the preferred name for a person, family, or corporate body should be the name or form of name most commonly found in resources associated with that person, family, or corporate body, or a well-accepted name or form of name suited to the users of the catalogue.

The title or form of title designated as the preferred title for a work should be the original title of the work, the title most commonly found in resources embodying the work, or a well-accepted title or form of title suited to the users of the catalogue.

References to the preferred name or title should be made from variant names and titles and from variant forms of the name or title that are found in resources associated with the entity or in reference sources, or that the user might be expected to use when searching for a name or title.

- 147.6.5 Barbara Tillett suggested that “common usage” should be more prominent to match the changes made to 5.2.4.1 in the *Statement*:

5.2.4.1 The uniform title should be the commonly known title in the language and script of the catalogue when one exists for the resource, otherwise

5.2.4.1.1. the uniform title should be the original title or

5.2.4.1.2. the title most frequently found in manifestations of the work.

147.6.6 The JSC discussed the significant change to AACR2 practice that this would represent. The rules in AACR2 chapter 25 for works created after 1500 specify using the form of title in the original language as the uniform title. There was recognition that use of the commonly known title would benefit users of the catalogue in some cases, but that the choice of the commonly known title would be subjective. The JSC agreed that there would be no changes to the form of access points without strong justification. The JSC decided to discuss 5.2.4.1 in the IME ICC *Statement* further at the October meeting, and also to become involved in the IME ICC voting process. Hugh Taylor volunteered to prepare a paper outlining the issue that could be responded to by the constituencies. The JSC members asked him to include the principles involved in choosing the title and the consequences of changing to match the IME ICC *Statement*.

**Action=LC representative (arrange IME ICC voting forms for JSC members);
CILIP representative**

147.6.7 Barbara Tillett noted that in AACR2 uniform titles are optional, while they would be required in RDA. She pointed out that this would be a major change. The Editor said that what would be required was to record the relationship between a manifestation and a work or expression embodied in the manifestation. He noted that this was the only way to satisfy the user task to find all manifestations of a work. The Chair said that this should be noted as a change to AACR2 practice.

Action=Secretary (Change to AACR2)

147.6.8 The Editor asked if there were any changes to the IME ICC *Statement* that would have an impact on the principle of “Language preference”. It was noted that the following sentence was consistent with IME ICC 5.3.4.1, but not with current practice: “If there is a commonly used title for a work in the language and script of the catalogue, preference should be given to that title.”

147.6.9 The Chair said that there was one other change in the IME ICC document that she wanted to discuss, the removal of “year (s) of publication or issuance” from the list of indispensable access points at 7.1.2.1. John Attig noted that in RDA the year was a required descriptive element. Barbara Tillett said that even as a descriptive element it could be used as an access point, e.g., in filtering searches. The Chair proposed that the JSC support including the year at 7.1.2.1 and suggest that the phrase “indispensable elements for access” be used in the IME ICC *Statement*.

147.6.10 The Editor suggested that as the JSC members review the draft of Part B they look at the instructions listed in part 3 of the cover letter of the draft and see how they relate to the IME ICC *Statement*.

Action=JSC

147.6.11 The JSC members suggested some further revisions to 5JSC/Editor/RDA/Objectives and Principles/Rev/3. It was noted that no revisions were required to the document to coincide with the constituency review of revised chapters 6-7.

p. 2 Objectives – Clarity: Barbara Tillett said that she would work on clearer wording for this paragraph.

Action=LC representative

p. 5 Objectives – Continuity: JSC discussed whether it should be included that strong justification will be required for changes. It was decided that the objective did not need to change but that this would be a “message” about RDA.

p. 5 Principles – Relationships: remove “bibliographical”.

p. 6 Principles – Uniformity: remove “numerals” as there will not be an Appendix on numerals. The comment was made that principle of uniformity conflicts with the principle of representation. The Chair noted that this issue would need to be revisited.

Action=Editor

147.7 4. Terminology

147.7.1 The Editor explained that the FRAD term “preferred” (indicating the designated usage of a controlled access point) had been used instead of the term “authorized”.

147.7.2 The Editor noted that Part B would be organized differently to Part A and that the headings in the text would not signify elements. He suggested that throughout RDA elements be labelled as “Required” only, rather than “Required element”. He added that the context would make it clear whether it was an element, or a sub-element, or a relationship. The JSC agreed.

Action=Editor

147.8 5. Examples

147.8.1 The Editor noted that the examples in the draft of Part B did not use a bold typeface for the entry element in a controlled access point as is done in AACR2 chapters 22-26. The Editor asked about the AACR2 practice of using italics for subheadings, some additions to names and subordinate names. The JSC decided that italics would not be used in examples.

147.8.2 The Editor suggested that in the interest of well-formed metadata, additions to names should be separate elements. He added that this would be more consistent with Part A. The JSC agreed. The Chair noted that this would avoid the current practice in examples in Part II of AACR2 of using ellipses at the end of examples to indicate that more may need to be added to the heading.

Action=Editor

147.8.3 The JSC discussed the placement of instructions in chapter 14 (Other information used in access point control). The JSC agreed that instructions in chapter 14 would be moved to the relevant chapter, e.g., 14.2 Other information used to identify persons to Chapter 9 (Access points for persons).

Action=Editor

147.9 6. Required elements

147.9.1 The JSC decided to discuss Part B required elements later in the meeting. [Note: discussion did not occur.]

147.10 7. Transcription

147.10.1 The Editor asked if the decisions made during the discussion of 5JSC/LC/5/Rev would apply to Part B. The Chair noted that LC had already agreed to prepare something on internationalization of Part B for the October 2007 meeting.

147.11 8. Punctuation

147.11.1 The Editor commented that AACR2 had been inconsistent in terms of including instructions for punctuation as opposed to showing punctuation only in the examples. He said that with the decision to treat additions to names as elements, this would remove the need for some punctuation specifications to be included in the instructions. He added that the information on punctuation used to separate elements would be in Appendix E. He noted that GARR did not prescribe all of the punctuation that would be included. Barbara Tillett commented that GARR was only used in Italy and not internationally. The Editor noted that if RDA did not use GARR, something did need to be used to put everything back together. The JSC discussed which presentation standard to use in Appendix E. One option is to continue to use the punctuation in AACR2 and consider this the RDA punctuation. The JSC asked the Secretary to ensure that further discussion of Appendix was included in the RDA Project Plan, Sub plan B. The JSC noted that once decisions on the Appendix had been made it would be useful if the second Examples Group prepared complete examples for Part B.

Action=Secretary; Examples Group 2

147.12 9. Simplification

147.12.1 The Editor said that the “special” rules in AACR2 chapters 22-26 had been included in Part B as additional instructions without any substantive changes. The JSC agreed that any simplification of these instructions could only be considered after the first release of RDA. It was acknowledged that this meant carrying forward some “case law” type rules into RDA. It was agreed that this decision would be included in the cover letter for Part B when it is issued for constituency review.

Action=Secretary (List of issues for consideration after first release of RDA; Part B cover letter)

147.13 10. Name vs. addition

147.13.1 The Editor said that it appeared that in some cases in AACR2 terms of honour and words or phrases accompanying a surname are to be treated as part of the name (22.1C, 22.8A1), and in other cases as additions to the name (22.15A, 22.15B1, 22.16D1). He added that these would now be separate elements.

147.13.2 Barbara Tillett asked what was meant by the preferred form of name, is it the full access point, or just the name part of the access point in inverted order? The Editor replied that the access point per se would not be an element; it was actually a concatenation of several elements. To create a preferred access point you would start with the preferred name and add to it. It might be possible to show three ways of referring to the preferred form, paralleling those used in chapter 7: using an identifier, using the name on its own, or using the name plus other elements (the equivalent to a description).

147.14 11. Access points for families

- 147.14.1 The Editor noted that investigations following the April 2006 meeting by LAC had shown that neither ISAD(G) nor ISAAR(CPF) provide substantive guidance on the formulation of access points for families. In addition, the relevant instructions in DACS and RAD contradict each other. He added that he had modelled the draft instructions in chapter 10 on those in chapter 9 (Access points for persons). The JSC agreed to discuss 5JSC/LC/6 later in the meeting (see 5JSC/M/152).
- 147.15 12. Additions to names of places
- 147.15.1 The Editor noted that the instructions for names of places taken from AACR include jurisdictions that no longer exist (e.g., Yugoslavia), and reflect a strong Anglo-American bias. Barbara Tillett suggested that LC could include proposals for change in the paper on internationalization of Part B. The JSC agreed.
Action=LC
- 147.16 13. Use of access points representing works, etc.
- 147.16.1 Included in discussion of the Strawman revision of section 13.1 (see 5JSC/M/148).
- 147.17 14. Additions to access points for manifestations and items
- 147.17.1 Included in discussion of the Strawman revision of section 13.1 (see 5JSC/M/148).
- 147.18 15. Access points for the Bible
- 147.18.1 Included in discussion of 5JSC/LC/8 and responses (see 5JSC/M/153).
- 147.19 16. Added entries
- 147.19.1 The Editor noted that scattered rules in AACR2 chapters 25 and 26 referred to “added entries”. He added that these references would be removed.
Action=Editor
- 147.20 17. Access points for series and serials
- 147.20.1 The Editor said that he thought that this issue had been covered when the JSC discussed the alternatives for organizing chapter 7. He noted that there had been agreement to treat series and serials as works. He added that this meant that the instructions in the chapter on names of works needed to be adequate to cover these types of resources. The Chair suggested that the issue be raised in the cover letter of the next draft.
Action=Secretary (Cover letter for Part B)
- 147.21 ALCTS Task Force on Non-English Access
- 147.21.1 John Attig noted that it had been suggested that the report of the ALCTS Task Force on Non-English Access be discussed at the meeting. He said that only one of the recommendations of the Group was relevant to RDA: “As Resource Description and Access (RDA) is developed, it is recommended that CC:DA and CC:AAM consider and comment on any impact that the new rules will have on cataloging non-English materials. This review should be referred to appropriate liaisons and groups when appropriate language expertise is lacking.”

147.21.2 John Attig also referred to an email forwarded by Jim Agenbroad to the JSC. John Attig said that his understanding was that in RDA the basic assumption was to record data in the vernacular, with an option to add transliteration. He asked whether this would carry through to Part B. The Editor explained that at 8.5 (Language and script of controlled access points), because there was nothing in AACR2, he had replicated what was in RDA chapter 1: “Record names and titles used in controlled access points in the language and script in which they appear on the sources from which they are taken.” He added that the alternative to record a transliterated form would be modified (as it had been for the rule in Part A (see 5JSC/M/133.4.2)) so that it could be in addition to the original script. John Attig noted that a section of this community wanted to be able to use vernacular data, but was aware that there were technical issues. He added that some in the community also wanted to be allowed to transliterate, and the instructions allowed for this. The Editor noted that the language and script of the record and the transliteration scheme used fell into the category of “data about data”. He added that keeping together vernacular and transliterated forms of the same data was an issue for the record format.

147.21.3 Barbara Tillett said that the issue was that currently the choice had been made not to use the original script as the preferred form. She noted that library systems were not yet able to handle access points in multiple scripts, although that would be desirable in the future. The Editor said that he would make the same changes to 8.5 as had been made to the equivalent instruction in Part A as part of the 5JSC/LC/5/Rev discussion. Agencies would need to develop policies. The Chair suggested that the Editor raise this issue again in the cover letter for the next draft of Part B.

Action=Editor; Secretary (Cover letter for Part B)

147.21.4 Barbara Tillett pointed out that “vernacular” had been used in the discussion and that as this had a number of connotations, “original script” was the preferred term.

147.21.5 John Attig said that he would discuss with Jennifer Bowen the best way to respond to Jim Agenbroad’s email.

Action=ALA representative

148 Strawman revision of section 13.1 (Constructing access points for works, etc.)

148.1 Received and considered the following document:
5JSC/Editor/RDA/Part B/Chapter 13/13.1 strawman [See Appendix A for this document]

148.2 The Editor explained that the 13.1 strawman had been prepared to help the JSC make decisions on suggestions in the responses to the June 2006 draft of chapter 7 that would radically change AACR2 practice on choice of primary access point. He added that he had also based the strawman on the principles of attribution, common usage or practice, and differentiation. John Attig said that he had some concerns regarding the principle of attribution, as not all attributions are equal. He said that his understanding of attribution is that you do not rely only on the sources, but on consensus of opinion in order to achieve accuracy. The Editor replied that the principle applied to all access points, not just the preferred access point, but that the preferred access point must be correct. John Attig said that in this context the principle was OK.

148.3 John Attig said that he was also concerned about the reference to “common citation practice” in the principle on common usage or practice. The Editor noted that none of the additional instructions at 7.7-7.12 had been included in the strawman, and that was where this principle was likely to come into play. He added that an alternative had been added at

13.1.1.0.2 to allow use of the citation practices of other communities in response to a comment from ALA. John Attig said that he was not sure what was meant by “citation practice” and his first thought was of citation manuals. The JSC noted that this alternative referred to an Appendix and discussed whether the special rules for music, law, religion, etc. should move there. The JSC decided that it was not appropriate to include instructions such as these in an appendix, and that the additional instructions would be included in chapter 13. It was noted that this was in the interests of continuity, and it was a desirable long-term goal to simplify the “additional” instructions. The Editor said that he would find a place for the instructions in chapter 13, possibly at the second level of numbering.

Action=Editor; Secretary (List of issues for consideration after first release of RDA)

- 148.4 The JSC discussed in turn each of the substantive changes in the strawman.
- 148.5 **To the extent that specific instructions formerly given under 7.2.1-7.2.8 have been retained, they have been combined with the general guidelines formerly given under 7.2.01-7.2.0.6.** (See 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 40.)
- 148.5.1 The Editor said that there had been comments that 7.2.1-7.2.8 was repetitive of 7.2.0.1-7.2.0.6. The JSC agreed with the combination of the guidelines.
- 148.6 **The guidelines and instructions draw a clearer distinction between new works and new expressions of a work.** (See 5JSC/RDA/Part A/Chapters 6-7/ACOC response, p. 4; 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 31 and p. 40; 5JSC/RDA/Part A/Chapters 6-7/BL response, p. 2; and 5JSC/RDA/Part A/Chapters 6-7/CILIP response, p. 6.)
- 148.6.1 The JSC agreed.
- 148.7 **The instructions make no reference to the presentation of information on the resource being described.** (See 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 3 and p. 40.)
- 148.7.1 The Editor noted that AACR2 referred to the “resource being described” but that the focus was now on describing works. He noted that this would impact on the anomalous rules in AACR2 relating to changes between editions. The JSC agreed with the change.
- 148.8 **The alternative at 13.1.1.0.2 makes allowance for following the citation practices of specialist communities even when they conflict with the general guidelines and instructions.** (See 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 31.)
- 148.8.1 The Chair noted that it had already been agreed not to make this change (see 5JSC/M/148.3).
- 148.9 **The instructions at 13.1.1.1.1 omit any specific criteria for considering a corporate body to have responsibility for a work.** (See 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 42 and p. 43.)
- 148.9.1 Margaret Stewart noted that if RDA did not contain these criteria (from AACR2 21.1B2), the national agencies would need to have rule interpretations. The JSC asked the Editor to reinstate the criteria.
- Action=Editor**

- 148.10 **The instructions at 13.1.1.2.1 have been reworked to omit the “rule of three”.** (See 5JSC/RDA/Part A/Chapters 6-7/ACOC response, p. 4; 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 33; and 5JSC/RDA/Part A/Chapters 6-7/LC response, p. 6. and p. 7.)
- 148.10.1 The Editor explained that he had reworked the instructions so that the name of the first creator would be used in the access point for the work. He noted that this would have a significant impact, in that many works that would formerly have had title main entry would now use the first named creator. The JSC discussed the importance of making it clear that this would apply to creators/collaborators only and not to contributors. The JSC agreed to the removal of the “rule of three”.
- 148.10.2 The Editor noted that the concept of the “first named” was difficult to include when there was no reference to manifestations in the instructions. He added that he had instead used the phrase “commonly named first when citing the work”. The JSC agreed to use this phrase. The Editor noted that in most cases there was only one manifestation of a work.
- 148.10.3 The Editor commented that the instructions for musical works were different. He added that he would add back in references to the special additional instructions.
Action=Editor
- 148.11 **The alternative at 13.1.1.2.2 makes allowance for including the name of more than one collaborator in the access point representing a collaborative work.** (See 5JSC/RDA/Part A/Chapters 6-7/ACOC response, p. 3.)
- 148.11.1 Barbara Tillett said that even as an alternative this would result in a huge change to existing practice. Hugh Taylor noted that this situation could be handled by work records. The Editor replied that libraries were currently stuck in scenario 2 in the database implementation scenarios (5JSC/Editor/2). The JSC decided to include the alternative in the draft that went out for constituency review and ask for comment.
Action=Secretary (Cover letter for Part B)
- 148.11.2 The JSC agreed that it was important for constituencies to know how the suggestions from the constituencies represented in the strawman had been dealt with. The JSC asked the Secretary to include the strawman in the meeting minutes. [Note see Appendix A].
Action=Secretary
- 148.12 **The instruction at 13.1.1.2.3 makes allowance for citing a collaborative work by its title in cases where the work is commonly cited in that form.** (See 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 32.)
- 148.12.1 The Editor noted that this change was to compensate for the removal of the rule of three. John Attig said that this proposal was part of the discussion on mixed responsibility in the ALA response. He suggested that as the JSC had not accepted other suggestions in that discussion it should not accept this one. The JSC asked the Editor to remove the instruction.
Action=Editor
- 148.13 **The instruction at 13.1.1.3.1 provides for citing a compilation using the name of the compiler in cases where the work is commonly cited in that form.** (See 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 32.)
- 148.13.1 John Attig said that the justification for the ALA comment was that it is arguable that in some cases the compiler is the creator of a compilation. The JSC agreed that in certain

circumstances a compiler is a creator, and in these cases the access point for the work would use the name of the creator. It was noted that the definitions in chapter 6 would be important for determining when a compiler acted as a creator. It was agreed that there needed to be an instruction for when the compiler is not the creator, i.e., to use the title to name the compilation.

Action=Editor

148.14 **The instruction at 13.1.1.6.3 is a consolidation of the separate instructions for works for which an unknown person, and unknown family, or an unknown corporate body or unnamed group is responsible formerly given under 7.2.7.3, 7.2.7.4, and 7.2.7.5.** (See 5JSC/RDA/Part A/Chapters 6-7/ACOC response, p. 5; and 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 52.)

148.14.1 The JSC agreed. The JSC discussed whether to use “unidentified” instead of “unknown” and decided not to.

148.15 **The guidelines and instructions on performances formerly given under 7.2.0.5 and 7.2.8 have been deleted. A footnote has been added at 13.1.1.4.1 indicating the criteria for treating a performance as an adaptation.** (See 5JSC/RDA/Part A/Chapters 6-7/LC response, p. 6 and p. 8.)

148.15.1 John Attig said that this change addressed some ALA concerns, but that he was concerned that it was not explicit that this is where performances are covered. The Editor explained that in the context of naming the work, performances are expressions. The work would only be named in terms of the performer if the performer is the creator. It was noted that this was a significant change to AACR2 where popular sound recordings are entered under the principal performer. The JSC agreed to the change in the strawman.

148.16 The Editor noted that the strawman had limited examples. He added that the examples would be broken down into elements.

149 **Draft of RDA Part B - Access Point Control (continued)**

149.1 The JSC discussed some general issues relating to the draft of Part B.

149.2 Subject access in RDA

149.2.1 John Attig noted that in the past the subject entities had been seen as out of scope for RDA. He suggested that it be acknowledged in the scope statement for each chapter in Part B that names can be used as subjects. Barbara Tillett noted that the JSC still needed to discuss whether subjects would be included in the list of required elements at 1.4. The JSC agreed to defer the discussion (see 5JSC/M/159.7).

149.3 Chapter 12

149.3.1 John Attig asked whether chapter 12 would only cover names of jurisdictions used as access points, or names of places for use as qualifiers, etc. The Editor replied that the scope was the same as chapter 23 in AACR2. John Attig noted that this was narrower than the FRBR entity “place”. The JSC asked the Editor to consider whether the difference between the scope of “place” in RDA and FRBR needed to be clarified.

Action=Editor

149.4 Changes of name

149.4.1 Margaret Stewart noted that 11.1.2 dealt with changes of name. She asked whether the LCRI on minor changes to corporate names could be incorporated. It was noted that the instruction only applied if you thought the name had changed. The JSC discussed the issue and decided that the LCRI would not be built in. It was agreed that 11.1.2 should be reworded to use “create a new preferred name” instead of “create a new access point”.

Action=Editor

149.5 Further comments on Part B

149.5.1 Barbara Tillett said that she had a number of detailed comments on the draft of Part B, and asked how she should register them. It was agreed that any JSC representatives that wanted to would submit informal comments on the draft by 29 June.

Action=JSC

149.6 Archival resources

149.6.1 It was noted that creation of an archival resource had been highlighted during the discussion on provenance, custodial history, and immediate source of acquisition. The Editor commented that depending on the nature of the resource, a large proportion of it could be incoming correspondence, which meant that the role was that of compiler. John Attig noted that the issue was the creation of the aggregation, as opposed to creation of the individual items. The JSC agreed that this is another case where the compiler can be viewed as the creator. The JSC asked the Editor to make this clear, possibly under the scope statement for “creator” in chapter 6.

Action=Editor

149.7 Change in statement of responsibility/publisher

149.7.1 The Secretary noted that the JSC had agreed to discuss with Part B the entry in the Mode of Issuance table under “Change in statement of responsibility” for Serials: “if the addition or deletion of, or a change to a statement of responsibility requires a change in the primary access point, create a new description; otherwise, make a note on the addition, deletion, or change if considered important.” (see 5JSC/M/137.19.1). The JSC agreed to replace “change in the primary access point” with “change in the access point for the work”. The Editor noted that all changes requiring a new description would also be listed at 1.3.

Action=Editor

149.7.2 The JSC discussed the entry in the Mode of Issuance table under “Change in publisher / distributor / manufacturer / producer” for Serials: “if the change requires a change in the primary access point, create a new description; otherwise, make a note on the later name if considered important.” The Editor said that he thought this provision was taken from *Differences between Changes Within*. Judy Kuhagen noted that there was an LCRI for this and it related to when the name of the publisher was used as a qualifier for a serial. The JSC decided not to introduce this into RDA.

Action=Editor

150 Proposals affecting 7.9.5. Treaties, International Agreements, etc.

150.1 Received and considered the following documents:

5JSC/CCC/1

5JSC/CCC/1/LC response

5JSC/CCC/1/BL response

5JSC/CCC/1/ACOC response
 5JSC/CCC/1/CILIP response
 5JSC/CCC/1/ALA response

5JSC/LC/5
 5JSC/LC/5/BL response
 5JSC/LC/5/ALA response
 5JSC/LC/5/CCC response
 5JSC/LC/5/CILIP response
 5JSC/LC/5/ACOC response
 5JSC/LC/5/Rev
 5JSC/LC/5/Rev/ACOC response
 5JSC/LC/5/Rev/BL response
 5JSC/LC/5/Rev/CILIP response
 5JSC/LC/5/Rev/CCC response
 5JSC/LC/5/Rev/ALA response

- 150.2 The Chair noted that all constituencies agreed with the proposal in 5JSC/CCC/1. She noted that CILIP has asked whether the proposal would render the special rules concerning the Holy See redundant. She added that points Q and R in 5JSC/LC/5/Rev also needed to be discussed.
- 150.3 Q. Proposed revision of 7.9.5.1, deletion of 7.9.5.2, and revision of 7.9.5.3
- 150.3.1 Barbara Tillett noted that the proposed revisions would result in use of the title as the primary access point for all treaties. Judy Kuhagen explained that LC had started by wanting to remove the preference for the government whose access point is first in English alphabetic order, and then had simplified the instructions further. She added that using the title was the only way to ensure the same result when naming the work in any language. She noted that the access points for the jurisdictions would still be present.
- 150.3.2 John Attig asked what others thought of the ALA suggestion that the first named government appearing in the name of the treaty be used as the primary access point for bilateral treaties. The JSC members suggested this would not work as the order can change between signings, and some treaties do not name the countries. John Attig said that ALA would prefer that bilateral treaties be entered under the signatories rather than the title. He said that ALA would like the opportunity to present another solution.
- 150.3.3 Margaret Stewart said that CCC was in agreement with the LC proposal, and it would have no impact on 5JSC/CCC/1. Judy Kuhagen noted that CCC was expanding what was covered by the LC proposal. The JSC asked LC to prepare a follow-up to 5JSC/CCC/1/LC response combining the wording in 5JSC/CCC/1 with that in 5JSC/LC/5/Rev. It was agreed that if ALA wishes to offer another solution for consideration it will issue a response to this document.
Action=LC; ALA
- 150.4 R. Proposed revision of 7.9.5.4 (renumbered as 7.9.5.3)
- 150.4.1 Hugh Taylor asked if there was a way that agreements conducted by the Holy See could be included in 7.9.5.1, as the result of the instructions was the same. It was noted that the reason that the instructions were currently separate is that historically the Holy See was not considered a national government. Hugh Taylor said that he would work informally

with LC to see if something could be included in the LC follow-up to 5JSC/CCC/1/LC response.

Action=CILIP representative

151 Rule proposals for archival and manuscript resources

151.1 Received and considered the following documents:

5JSC/LC/3

5JSC/LC/3/CILIP response

5JSC/LC/3/ACOC response

5JSC/LC/3/CCC response

5JSC/LC/3/ALA response

5JSC/LC/3/BL response

5JSC/LC/3/LC follow-up

151.2 The Chair noted that there were two outstanding issues relating to Part B from the proposal to be discussed. She added that the relevant comments were summarised in the response table for 5JSC/LC/3/LC follow-up under two headings: 22.1 Primary access point, and Part III of RDA: Access Point Control.

151.3 22.1 Primary access point

151.3.1 The Editor noted that in the current drafts there were no instructions on primary access point. He said that it had already been agreed that the definition of creator would encompass creators of archival resources.

151.4 Part III of RDA

151.4.1 The Chair commented that the text in 5JSC/LC/3/LC follow-up under this heading was discursive. Judy Kuhagen explained that it was not intended as wording for RDA. She noted that some information on creators was included in bibliographic records in the archival community, while others included this information in authority records. She added that alternatively there could be very full archival authority records. The Editor noted that in chapter 14 he had incorporated FRAD, which had tried to accommodate the archival community. The JSC discussed whether the primary purpose of the authority record is to control the form of access points. The Editor noted that it had already been agreed to move elements from chapter 14 into the other chapters, which would mean that the chapter title would become the name of the entity, e.g., "Persons". John Attig noted that archival cataloguing and museum practice followed a different set of principles. He added that any reconciliation of principles would need to happen by discussion with those other communities. The Chair suggested this be added to the list of post first release issues. The Editor suggested that title of the part "Access point control" could be too limiting. The JSC decided not to change the title of the part. It was suggested that the cover letter to Part B include the relationship of Part B to practices in other communities.

Action=Secretary (List of issues for consideration after first release of RDA; Cover letter for Part B)

152 Family names

152.1 Received and considered the following documents:

5JSC/LC/6

5JSC/LC/6/BL response

5JSC/LC/6/CCC response
 5JSC/LC/6/CILIP response
 5JSC/LC/6/ACOC response
 5JSC/LC/6/ALA response

- 152.2 Barbara Tillett said that LC had been asked by the JSC to prepare the original proposal on family names. She suggested that the instructions not be included in RDA as there was no agreement on the form of family names. She noted that the disagreement centred on whether families were like persons or like corporate entities. She added that she did not think they were a separate category. The Chair noted that the BL saw families as having a subject relationship to the resource. She added that the other constituencies appeared to welcome engagement with the issue. The Editor said that in the current draft of Part B he had kept the instructions on names of families in line with those for names of persons. He noted that DACS and RAD differed in how they treated family names.
- 152.3 The JSC discussed the issue and agreed that ideally something on formulating names of families (as a separate category) should be included in the first release of RDA. The Chair said that if Margaret Stewart were willing to help, she would see if an ACOC or ACOC rep proposal could be prepared for discussion at the next meeting. The Editor said that part of the issue is what constitutes a family. Barbara Tillett noted that this was cultural. John Attig said that the ALA response to 5JSC/LC/6 had raised a number of issues that should be considered. The Editor said that if efforts to include instructions on family names failed this would have an impact on the text elsewhere, e.g., the phrase “persons, families, and corporate bodies”.

Action=ACOC representative; CCC representative

153 Bible Uniform Titles

- 153.1 Received and considered the following documents:
 5JSC/LC/8
 5JSC/LC/8/BL response
 5JSC/LC/8/CILIP response
 5JSC/LC/8/CCC response
 5JSC/LC/8/ALA response
 5JSC/LC/8/ACOC response
- 153.2 The Chair said that all constituencies supported the removal of Christian bias in Bible uniform titles, but that questions remained as to the best way to do this, and the best time.
- 153.3 Barbara Tillett noted that there was agreement that RDA should include an instruction for sacred scriptures entered under author. She added that it had been recommended that this be treated in the body of the text, rather than in a footnote as it had been in 5JSC/LC/8.
Action=Editor
- 153.4 Barbara Tillett said that there was agreement in the responses that the abbreviations “O.T.” and “N.T.” should be spelt out in full. She noted that there was also agreement that the books of the Bible should be entered directly after “Bible” without the intervening “O.T.”, “N.T.”, or “Apocrypha”. The comment was made that there was agreement in principle, but there was concern regarding the extensive changes that would be required to authority files.

- 153.5 The JSC discussed the alternative proposed by LC: “Because different religious groups may use “Bible” to refer to canons with varying content, some cataloguing agencies may substitute a more specific term to represent the Bible (or parts of the Bible) used in a certain religious context, e.g., **Hebrew Bible** or **Tanakh** as a substitute for **Bible**, **Old Testament**, or **Christian Bible** as a substitute for Bible”. John Attig said that ALA was uncomfortable with the alternative rule, and thought that if the goal was removing bias it did not go far enough. He said that there was also a concern regarding the reliance on the Authorized Version of the Bible. Hugh Taylor said that CILIP also had difficulty with the alternative. Margaret Stewart said that CCC would prefer that “Bible” be qualified. Alan Danskin noted that BL would prefer the subheadings be used, e.g., “Bible. Christian Bible”. The JSC decided that due to lack of agreement, no change would be made to AACR2 rule 25.17A for the first release of RDA. It was noted that it would be more appropriate to make any change in the context of the future revised governance structure for the JSC.

Action=Secretary (List of issues for consideration after first release of RDA)

- 153.6 The JSC discussed whether it would be worth making the other changes proposed by LC for the first release of RDA. The JSC decided to consult the constituencies as to whether the strong justification for change will outweigh the disruption to existing files. The JSC asked the constituencies to indicate whether they agree that the following changes should be included in the first release of RDA:

The Old and New Testaments will be referred to by their spelled out forms, not the existing AACR2 abbreviations “O.T.” and “N.T.”

Access points for individual books of the Bible will use the name of the book immediately following “Bible” rather than interposing the name of the appropriate Testament.

Access points in the form “Bible. Old Testament”, “Bible. New Testament”, and “Bible. Apocrypha” will be used to identify those parts of the Bible as aggregate works.

The JSC asked the constituencies to issue a follow-up to their responses to 5JSC/LC/8.

Action=ACOC, ALA, BL, CCC, CILIP

Executive Session 4

154 Arrangements for reviewing and editing RDA drafts

154.1 [Note: included in 5JSC/M/Restricted/129-169.]

155 RDA Glossary Editor

155.1 [Note: included in 5JSC/M/Restricted/129-169.]

End of Executive Session 4

156 RDA Scope and Structure

- 156.1 Received and considered the following documents:
 5JSC/RDA/Scope
 5JSC/ALA/5
 5JSC/Strategic/1/Rev
 5JSC/Editor/RDA/Objectives and Principles/Rev/3
- 156.2 The Chair said that the JSC had held some general discussions on the RDA Scope and structure document and the ALA response to it (5JSC/ALA/5) in Executive session at the start of the meeting. She noted that the document had been prepared with two audiences in mind, the JSC constituencies, and the IEEE/LOM community. She added that it represented the current thinking about RDA and that this was not necessarily represented in the publicly available drafts. The JSC intended that the RDA Scope and structure document be maintained in the same way as other documents that set the framework for RDA. Finally, she noted that there were some issues that required further discussion: encoding of RDA data; “data about data”; and, selectivity in use of FRBR and FRAD.
- 156.3 “Data about data”
- 156.3.1 The Editor referred to the Scope analysis table. He explained that each RDA element had been given the classification of “element”, “element sub-type” or “description”. The Editor said that he was concerned about those elements labelled as notes. He added that chapter 3 notes fell under the definition of elements as they were all free-text representations of characteristics. However, for notes covered by chapter 2 (e.g., notes on titles), he had put a question mark in the classification column. He said that in some cases these were “data about data” e.g., the note on the source of the title proper. The Editor said that he wanted to be sure that the JSC was comfortable with moving these instructions to a notional Part C or an appendix. He said that some notes were neither an element sub-type nor “data about data”, e.g., “Title varies”.
- 156.3.2 The Chair asked if it was possible to define the parameters for “data about data”. The Editor said that in many cases there would be a list or source to refer to to provide an encoding vocabulary, e.g., “Cover title”, or the content would be controlled, e.g., the language, the transliteration scheme. Barbara Tillett asked why it was necessary to make these distinctions. The Editor said that ALA had commented that it was not clear what each of the “things” in RDA is. He added that the input of the DC community was that this is important for well-formed metadata. RDA is moving away from just being a manual into the creation of a metadata scheme. As RDA is not using ISBD, we are relying on proxy schema; in the future we may move to registering RDA as a schema.

Barbara Tillett said that she was concerned about the reorientation of cataloguers and orientation of new cataloguers, and that she thought that this structure should be behind the scenes. The Editor said that the issue was there were people looking behind the scenes and saying that there are problems. He said that he wanted to have the current discussion as preparation for the upcoming data model meeting. He confirmed that he would share the Scope analysis with the attendees at that meeting. It was agreed that the document would be made public after the data model meeting. The Editor said that the “Corresponding DC-Lib term” column would not be included in the public version of the document as it needed to be checked.

Action=Editor

- 156.3.3 The Editor noted that there were some elements that had sub-elements. He added that this structure had been used in order to show relationships between one piece of data and another. The Chair confirmed that no one wanted to revisit this decision.
- 156.4 Encoding RDA data
- 156.4.1 The Editor referred to the document “Encoding RDA data” (issued after the meeting as 5JSC/Editor/3). He noted that that RDA could be seen as a metadata schema. He added that characteristics of other metadata schemas had been built in, such as specifying and defining elements, element sub-types and sub-elements; and establishing parameters for value representations. He said that it was also an application profile as it built in requirements and it references or supplies specific encoding schemes. The Editor said that there was still the question of how broad the application profile should be, and whether it is just for libraries. John Attig noted that this question was constantly being posed. Barbara Tillett said that she thought it was clear that RDA would be mainly for libraries, and that it was there as an option for other communities to consider using. The Chair noted that some alternatives had been introduced to RDA that some had said should not be part of a library application profile.
- 156.4.2 The discussion returned to “data about data”. The Editor suggested that the “data about data” which was moved to an appendix would be those with a vocabulary encoding scheme. He suggested that these would be like “free-floaters” and could be added to any element, in a similar way to DC refinements. Examples of this would be the language of the data, and the source of the data. The Chair noted that this work had not yet been scheduled. The Editor said that some “data about data” would come up with Part B and he would work on it at the same time. The Editor confirmed that the JSC was comfortable with one appendix or a group of appendices for this data. The JSC discussed when the work would be done. It was noted that none of the “data about data” is required for resource discovery. The JSC agreed to provide something for the first release of RDA. The work will begin with the “data about data” relating to the elements in Part B.
- Action=Editor**
- 156.4.3 The JSC discussed the three alternatives for recording RDA values as outlined in the “Encoding RDA data” document: elements for which RDA specifies controlled lists of values; designations used to indicate roles and relationships; and, elements for which there is an internationally recognised encoding scheme.
- 156.4.4 The Editor noted that controlled lists of values were found mostly in chapter 3, although there were some in chapter 4. He said that the issue was that in RDA these were shown as text strings in natural language. He added that there had been debate within the JSC as to whether there should be an alternative to record an equivalent coded value. He said that there had been some unease about this. He added that it had been suggested that there be something in the general chapters or Introduction about substitution of terms by coded values from another vocabulary encoding scheme (which would need to be identified). The JSC discussed the issue, noting that it is no different to build a crosswalk from a term or a coded value, but that fixed length data elements are better for machine processing. Another aspect is that you may want to display an alternative term for users in your own language. There was a discussion on whether what is recorded is the same as what is stored. The point was made that an equivalent coded value is not a parallel vocabulary. During the discussion the Editor suggested that the entries in controlled lists could be referred to as “values” rather than “terms”. He noted that this language is somewhat alien

to the library community. The JSC decided to continue to use “term” and to revisit the issue after reviewing the responses to chapter 3.

Action=JSC

- 156.4.5 The Editor noted that designations to indicate roles and relationships had been discussed earlier in the meeting (see 5JSC/M/146.4 and 5JSC/M/146.9)
- 156.4.6 The Editor said that during the discussion on resource identifiers it had been agreed that if there was a specified encoding format it would be used (see 5JSC/M/134.4.3). He added that the use of an international standard encoding scheme had come up in discussions on duration. He noted that to date there had been no agreement on specifying the use of an international standard. John Attig said that you needed to consider whether the duration or date would be used for display or for machine processing, limiting or sorting. The Chair commented that even if data was stored one way it could be displayed another way. The Editor said that if the year of publication was seen as an indispensable access point by the IME ICC, thought would need to be given to recording it in a normalized form.
- 156.5 Selectivity in use of FRBR and FRAD
- 156.5.1 John Attig said that the issue was whether this needed to be spelled out in the Scope document. The Editor noted that more elements from FRAD might be included now that there would be an appendix on “data about data”. The Chair asked if it was necessary to specify in what cases RDA goes beyond FRBR. The Editor said that in most cases this was to extend the scope of application of an attribute. He said that there were very few cases where RDA had an attribute that was not in FRBR, and that some of these such as the “Description based on” note fell into the category of “data about data”.
- 156.5.2 The Chair confirmed that ALA would supply informal suggestions for changes to the Scope and Structure document. She added that no other constituency responses were required.

Action=ALA

157 RDA Appendices Group

- 157.1 Received and considered the following documents:
5JSC/Chair/9
5JSC/Chair/9/Chair follow-up/1
5JSC/Chair/9/Chair follow-up/2
- 157.2 The Chair asked the Chair of the RDA Appendices Group, Judy Kuhagen, to speak to the Group’s status report (5JSC/Chair/9/Chair follow-up/2).
- 157.3 Appendix A – Capitalization
- 157.3.1 Judy Kuhagen said that the Group had not made much progress on this Appendix as it was waiting on JSC decisions. She added that the Appendix would need to be reorganized to remove the current organization by ISBD areas.
- 157.3.2 Judy Kuhagen said that at the October 2006 meeting the JSC had disagreed with the Group’s suggestion for a general instruction on punctuation in chapter 1, but had not provided any other guidance. She noted that the Group needed JSC decisions on lines 59, 61, 74, and 81 from the part I response table. She said that the Group would find it easier to work with the revised version of 1.6 that was to be prepared by the Editor. The Editor

said that he had incorporated at 1.6 what had been agreed so far, and would incorporate what had been agreed at this meeting.

- 157.3.3 The JSC discussed punctuation and transcription. It was noted that currently some punctuation was changed only because it conflicted with ISBD punctuation. The JSC agreed that elements would be transcribed as found including punctuation, but that there would be a reference to Appendix D for the ISBD punctuation. This Appendix will instruct you to change the punctuation if it conflicts with the prescribed punctuation. The Editor said that there might need to be a separate section in 1.6 on punctuation.

Action=Editor

- 157.3.4 Judy Kuhagen said that there needed to be a discussion on what to do with upper and lower case letters. It was noted that it would be easy for people to land at 1.6.1 containing instructions for capitalization and not realise that there were options at 1.6 which, if applied, would mean this was not followed. The Chair said that the issue was reconciling linear use of the text with jumping in via keyword access. She suggested that the Editor propose a solution. The Editor said that he was not sure what could be done. Judy Kuhagen said that the Appendices Group would draft a general instruction for the Appendix.

Action=Appendices Group

- 157.4 Appendix B – Abbreviations

- 157.4.1 Judy Kuhagen said that the Group had begun removing abbreviations but needed further decisions from the JSC including those on chapter 3 and Part B.

- 157.5 Appendix C – Initial articles

- 157.5.1 Judy Kuhagen said that language experts at LC were checking on the problem, as noted by CCC, of the presence of some partitive articles in the AACR2 appendix. The Chair noted that the addition of new languages to the Appendix would be solicited after the first release of RDA. Judy Kuhagen said that the statement about the languages being the “most commonly used” would be removed. Judy Kuhagen asked whether discussions on initial articles in relation to Part B could mean that the appendix is not required. The Chair said that the decision had been made and the JSC did want the appendix. The Editor pointed out that regardless of the instruction, you still needed to know what the initial article is, either to omit it, or to indicate that it is to be disregarded in filing. Judy Kuhagen said that the Group could go ahead and finish this Appendix.

- 157.6 The Chair asked John Attig whether he would remain on the Group now that he is a member of the JSC. John Attig said that he would and that Judy Kuhagen had a realistic expectation of what he would be able to contribute.

158 RDA Examples Groups

- 158.1 Received and considered the following documents:

5JSC/Chair/1

5JSC/Chair/1/Rev

5JSC/Chair/1/Rev/Chair follow-up

5JSC/Chair/1/Rev/Chair follow-up/2

5JSC/Chair/1/Rev/2

5JSC/Chair/1/Rev/2/Chair follow-up/1

5JSC/Chair/2
 5JSC/Chair/2/Rev
 5JSC/Chair/2/Rev/2
 5JSC/Chair/2/Rev/3

- 158.2 The Chair noted that Denise Lim, Chair of Examples Group 1 was present at the meeting. Denise Lim said that the turn around times to supply examples for drafts were getting shorter, which did not leave enough time for discussion within the Group. The JSC agreed that accuracy is more important than quantity of examples. The JSC also agreed that the Examples Group should select the examples rather than providing a pool from which the JSC needed to select. It was noted that an example for every material type was not required for every instruction. The Chair said that she would communicate these decisions to the Chair of the Examples Group 2. Barbara Tillett said that any examples rejected for RDA should be kept as they could be used in training or a future document.

Action=Chair

- 158.3 Margaret Stewart noted that there seemed to be an expectation that full examples would be provided for RDA, and asked who would do this. The Editor suggested that the examples that had been created for chapter 3 could be built on. The JSC agreed that full examples would be in the form of a labelled RDA display, ISBD display, MARC 21 display, and Dublin Core display. Only a small core of full examples would be needed. It was noted that post the first release more examples could be provided and other display formats could be illustrated.

Action=Secretary (List of issues for consideration after first release of RDA)

- 158.4 The Chair noted that the JSC is conscious of the enormous amount of work being done by the Examples Groups, in particular by the Chairs.
- 158.5 The Chair asked Rachel Gagnon, a member of Examples Group 2 if she had any comments to make. Rachel Gagnon said that there had been email discussions in the Group regarding the role of examples. The JSC agreed with the Group that the role of examples is to illustrate and not to provide extra information about an instruction.

159 Levels of description, access, and authority control

- 159.1 Received and considered the following documents:
 5JSC/ACOC rep/1
 5JSC/ACOC rep/1/CILIP response
 5JSC/ACOC rep/1/LC response
 5JSC/ACOC rep/1/ACOC response
 5JSC/ACOC rep/1/ALA response
 5JSC/ACOC rep/1/CCC response
 5JSC/ACOC rep/1/BL response
- 159.2 The Editor explained that he had made minor changes to the list of required elements (1.4). He said that now that all statements of responsibility had been grouped together under one element, he had made it clear that the required element is the statement of responsibility relating to the title. He added that information about what to do if there is more than one statement of responsibility had been moved from a footnote. He noted that as had been agreed in the Part I table the parenthetical was now written in the plural:

“statement(s) identifying person(s), family (families), or corporate body (bodies) with principal responsibility”.

- 159.3 The Editor said that as agreed at the April 2006 meeting he had split the list of required elements into two lists, those required for any kind of resource, and those that are required if applicable to the type of resource. He added that there is currently no distinction between those elements which absolutely must be present in the description (i.e., the title proper), and those which are required if present on the resource. The JSC discussed the issue. The Editor noted that there are actually four distinctions that could be made: 1. there is never a record without this element; 2. the element is required if applicable (any type of resource); 3. the element is required if applicable to a particular type of resource; 4. the element is optional. The comment was made that the first category was catered for by having an instruction to supply the element if it is not present in those cases. The JSC decided to revert to one list of required elements, and to use the shorter label “Required” in all cases. It was noted that the existing paragraph at 1.4 would make the situation clear: “When describing a resource, include as a minimum all the elements listed above that are applicable to that resource.”

Action=Editor

- 159.4 The Editor said that he added the element “Carrier type” to the list. Barbara Tillett asked about “Content type”. The JSC decided to wait for responses to the revised chapter 3 before making a decision. Later in the discussion, the JSC decided to add “Content type” to the list, as the addendum to the revised draft of chapter 3 had it labelled as a required element. It was noted that comments had been requested on the “Media type” element in general. The Editor noted “Numbering (for serials) was now “Numbering of serials”.

Action=Editor

- 159.5 The Editor said that the required elements “Publisher, distributor, etc. (if more than one only the first recorded)” and “Date of publication, distribution, etc.” needed to be discussed in light of the decision to group elements by the event, i.e., creation, capture, production, publication, and distribution. He noted that each event would have an agent, a location, and a time. The JSC discussed what to include in the list of required elements, and decided that it was necessary to see the reworked instructions and how the elements are defined before making a decision.

Action=JSC

- 159.6 The Editor noted that before the inclusion of chapters 6 and 7 in Part A, the rationale for the list of required elements was the “identify” function. He noted that it would now need to include the “find” function. The JSC confirmed that the following would be added to the list of required elements: first named creator; and, the inherent relationship between a manifestation and the work or expression embodied in the manifestation. The Secretary asked whether the “authorising body” would be required. The JSC decided that it would not be.

Action=Editor

- 159.7 Barbara Tillett asked whether subject elements would be included in the list of required elements. It was noted that either a subject element would have to be included in chapter 4 or it could be handled by a general statement. The Chair suggested that as LC had raised the issue previously, Barbara Tillett could bring wording for a general statement to the next meeting. The JSC agreed to discuss it then.

Action=LC representative; JSC

- 159.8 The Secretary noted that the list of required elements included in the FAQ on the JSC Web site needed to be updated. It was agreed that the Editorial team would update the list, and include a statement that it is being reviewed in relation to the publication elements, chapters 6-7, and Part B.

Action=Editorial Team

160 RDA: Resource Description and Access Part I - Constituency Review of December 2005 Draft

- 160.1 Received and considered the following documents:

5JSC/RDA/Part I

5JSC/RDA/Part I/Chapter 3

5JSC/RDA/Part I/Chair follow-up/1

5JSC/RDA/Part I/Chair follow-up/2

5JSC/RDA/Part I/Chair follow-up/3

5JSC/RDA/Part I/Chair follow-up/4

5JSC/RDA/Part I/Chair follow-up/5

5JSC/RDA/Part I/LC response / 5JSC/RDA/Part I/Chapter 3/LC response

5JSC/RDA/Part I/CCC response

5JSC/RDA/Part I/Chapter 3/CCC response

5JSC/RDA/Part I/ACOC response / 5JSC/RDA/Part I/Chapter 3/ACOC response

5JSC/RDA/Part I/ALA response

5JSC/RDA/Part I/BL response / 5JSC/RDA/Part I/Chapter 3/BL response

5JSC/RDA/Part I/CILIP response / 5JSC/RDA/Part I/Chapter 3/CILIP response

5JSC/RDA/Part I/Chair follow-up/6

5JSC/RDA/Part I/Sec follow-up

5JSC/RDA/Part I/Sec follow-up/Rev

5JSC/RDA/Part I/Sec follow-up/Rev/2

- 160.2 The JSC prioritized, and then discussed some line numbers from 5JSC/RDA/Part I/Sec follow-up/Rev/2, using a version of the table that included comments from the RDA wiki.

- 160.3 Alternatives for unknown publishers, etc., places and dates

- 160.3.1 The JSC discussed alternatives to the terms “Publisher unknown” (2.7.1.3), “Place of publication unknown” (2.8.1.3), and “date unknown” (2.9.1.3.) as proposed in responses to the December 2005 draft of Part I.

- 160.3.2 2.7.1.3 No publisher identified

Line 315: Change heading to "No publisher identified or no publisher" (CCC)

Line 316: Use "Publisher not stated" or "Publisher not given" (CILIP)

Line 317: Use "Publisher not named" (LC)

It was noted that there were difficulties with using "unnamed", as the publisher does have a name. The JSC decided that as the focus of chapter 2 is identification, what will be recorded is “Publisher not identified”. John Attig asked about the use of square brackets around the phrase. The Secretary replied that it had been agreed to revisit this issue after obtaining the responses to the revised chapter 3. The Chair noted that the statement “Publisher not identified” was “data about data” but that you might want to treat it in the same way as the element had it been there. She added that it was similar to “Title varies” and said that there needed to be a general decision on how to handle this type of data.

Action=Editor; JSC

160.3.3 2.8.1.3 Place of publication not identified in the resource

Line 329: Change heading to "Place of publication not identified in the resource or no place of publication" (CCC)

Line 330: 2nd para: Use "Place not stated" or "Place not given" (CILIP)

Line 331: 2nd para: Use "Place not named" (LC)

The JSC agreed that the instruction would be to record "Place of publication not identified".

Action=Editor

160.3.4 2.9.1.3 Date of publication not identified in the resource

Line 366: 3rd para: Use "Date not stated" or "Date not given" (CILIP)

Line 367: 3rd para: Use "undated" and reword (LC)

The JSC agreed that the instruction would be to record "Date of publication not identified". It was noted that this pattern would be followed for each type of date.

Action=Editor

Line 359: Make clear that "[date unknown]" is a last resort, restore examples from AACR2 (ALA)

It was noted that this line number was dealing with a different aspect of the issue and should be left in the wiki.

160.3.5 2.9.0.2 Sources of information

Line 346: 3rd para: need consistency "named" vs. "identified" (CCC)

The JSC agreed that the third bullet would read: "If the date of publication, distribution, etc., is not identified within the resource itself ..."

Action=Editor

160.3.6 2.9.5.3 Recording date of production for an archival resource or a collection

Line 375: Final para: prefer "date unknown". (CCC)

The JSC agreed that this instruction would be to record "Date not identified".

Action=Editor

160.4 1.6.6 Letters or words intended to be read more than once

160.4.1 Line 77: Reinstate AACR2 rule (ACOC, ALA)

John Attig noted that the Editor had added the following comment to the status column in the wiki: "Confirm acceptance of deviation from principle of transcribing without interpolation". He added that it is a challenge to transcribe as you see in this situation, as the words are not intended to be read as they are presented. The Editor said that to reinstate the AACR2 rule would be to reverse a previous decision. Barbara Tillett noted that this meant not transcribing. The Chair commented that you would be transcribing as if the text is repeated. Barbara Tillett said that she was not happy about this, but was willing to go with the majority view. The JSC agreed to reinstate the AACR2 rule.

Action=Editor

160.5 2.3.0.5 Introductory words, etc.

Line 149: Add wording for "in case of doubt" (LC)

Hugh Taylor said that CILIP was in favour of deleting the instruction completely and was willing to prepare a brief proposal. John Attig noted that the instruction was one that had been added to AACR2 relatively recently. The Editor commented that the instruction was really about naming the resource, and what is part of the title. The JSC agreed that CILIP would prepare a proposal. The Secretary was asked to send Hugh Taylor the reasoning for the original change made to AACR2.

Action=CILIP; Secretary

160.6 Alternative titles as variant titles

160.6.1 2.3.1 Title proper

Line 157: Treat alternative titles as variant titles (ALA)

John Attig noted that the ALA suggestion would be a change to current rules and would result in RDA differing to the ISBD. The JSC discussed the issue and agreed that the alternative title is not a variant of the title proper. The JSC decided that an element subtype for “Alternative title” would be added to the title element. There was further discussion regarding the “or” that may be included on the resource, and what should be recorded to make the alternative title accessible using a browse or a left-anchored search. It was noted that it could be considered an introductory word to the alternative title. The JSC asked the CILIP rep to include this situation in the paper on introductory words.

Action=Editor; CILIP rep

160.6.2 2.3 Title

Line 135: Query no definition or instruction for alternative title (Also line 142)

The JSC agreed that this was covered by the decision at Line 157.

160.7 2.3.8.4 Title variations, inaccuracies, and deletions

160.7.1 Line 241: 2nd para: Treat identification and access requirements separately

Hugh Taylor noted that there had been agreement with the CILIP suggestion (in the wiki) for the second paragraph: “If an inaccuracy in a title has been transcribed as it appears on the source of information when recording a title proper, etc., make a note giving the corrected form of the title if it is considered to be important for identification.” The Secretary read out the additional CILIP comment: “That leaves the question of the need for an access point to be addressed in Part B, which seems to be its proper place. What it doesn't allow, of course, is the option to give an access point in place of a note when the corrected form is considered to be important for identification, but the CILIP line was that giving a note *shouldn't* be optional in such circumstances anyway.” The Editor noted that the only place titles are covered is in chapter 2; except for the title of the work that is in Part B. John Attig commented that this is actually a variant title. The JSC agreed to remove the second paragraph from 2.3.8.4, and to move the provisions to the instructions on variant titles. As a result, the option to provide an access point in lieu of making a note is not required. Judy Kuhagen suggested that the third paragraph of 2.3.8.4 also be moved. The JSC agreed. She noted that LC had proposed changes to the wording including adding an option (line 242). The Editor replied that the option was not required in the new context. The Secretary confirmed that the changes proposed at lines 241 and 242 had now been superseded.

Action=Editor

160.8 Part I response table

160.8.1 The JSC discussed how to resolve the remainder of the comments in the Part I response table (5JSC/RDA/Part I/Sec follow-up/Rev/2). The Chair asked the JSC to submit to the Secretary the line numbers to be withdrawn, and to send suggestions for line numbers to be discussed together, and possible teleconference topics. The Chair said that she would load the comments on chapters 4, 5 and 6 (i.e., Part I chapter 6) into the wiki.

Action=JSC; Chair

160.8.2 The Secretary asked what comments from the wiki should be included in a public version of 5JSC/RDA/Part I/Sec follow-up/Rev/2 “for the record”. The JSC decided that decisions will be exemplified in RDA drafts. It was noted that the JSC members do need a way to track the decisions that have been made outside of meetings.

Executive Session 5

161 Outcomes of CoP meeting

161.1 [Note: included in 5JSC/M/Restricted/129-169.]

162 Scope of JSC Web sites and document distribution

162.1 [Note: included in 5JSC/M/Restricted/129-169.]

163 Formal recognition of individuals and groups contributing to the development of RDA

163.1 [Note: included in 5JSC/M/Restricted/129-169.]

End of Executive Session 5

164 Update on related projects and other resource description communities

164.1 Barbara Tillett provided an update on a number of projects and meetings:

164.1.1 FRAD: the final draft has been issued for world-wide review with comments requested by July 15.

164.1.2 FRBR Review Group: The Group is revising the expression entity wording based on comments arising from the world-wide review.

164.1.3 ISBD: there will be a preliminary edition of the consolidated ISBD this year. The work of the Working Group on Material Designations will not be included in this edition. The Chair noted that Lynne Howarth had told her that the Group is watching the work of the JSC with interest and will evaluate whether to make a formal response to chapter 3.

164.1.4 World Digital Library project: IFLA will be involved in the development of guidelines.

164.1.5 IFLA and IPA: IFLA and the International Publishers Association met in Turin, Italy in early March 2007, and discussed cooperation between libraries and publishers on bibliographic control.

164.1.6 NLM and NAL: Barbara Tillett met with the NLM and NAL in November and will meet with them again in June. She is updating them on progress with the drafts and responding

to their questions. This joint group will also talk about implementation, options, and training/orientation.

- 164.1.7 Unicode: there have been discussions amongst the NACO nodes (and LAC) regarding including non-roman references in authority records. They have agreed on a model, but have not yet developed guidelines. This will not occur before January 2008.
- 164.1.8 VIAF: There has been success with the first stages of the software. There are plans to expand the membership and include data from the Bibliothèque nationale de France. There have been experiments with using OAI to keep data up to date, and there will be work on including Cyrillic and Arabic scripts.
- 164.1.9 The Library of Congress is involved in various programs to obtain records from publishers and vendors.
- 164.2 The JSC members discussed their participation in upcoming outreach activities.
- 164.3 The Chair said that the National Library of Australia is working on a People Australia project that will combine NLA authority data with data from a range of sources, e.g., the Australian Dictionary of Biography.

165 Next meeting

- 165.1 The Chair confirmed that the next meeting would be held from October 15-19 in Chicago. She said that she would contact the CoP to suggest dates for the April 2008 meeting.
Action=Chair

166 Actions arising out of the JSC Meeting October 2006

- 166.1 The JSC discussed the following outstanding actions from the October 2006 meeting:
 - 166.1.1 Chair: Obtain copy of presentation from Diane Hillmann (5JSC/M/Restricted/121.10)

It was noted that a URL had been circulated.
 - 166.1.2 Chair: report to CoP the JSC's thoughts on the RDA/ONIX recommendations (5JSC/M/Restricted/126.4)

The Chair commented that she was not yet in a position to share anything with the CoP about the next steps. It was noted that this had been discussed in executive session on the first day of the meeting.
 - 166.1.3 Project Manager: FAQ on cataloguing using RDA (5JSC/M/109.14.1)
Action=Project Manager
 - 166.1.4 JSC: Discuss the LC suggestion that categorizing labels in examples should be in a different font (5JSC/M/104.12.1)

The Secretary said that she would find the source of the original comment and refer it to the Examples Group.

Action=Secretary

- 166.1.5 JSC: Consider intellectual property issues to do with using MARC 21 terms (5JSC/M/107.10.1)

The Secretary said that use of definitions from FRBR and FRAD had also been discussed. The Editor said that the Glossary Editor would need to identify when definitions came from another source so that the publishers can clear copyright. The Chair said that she would include this in the Glossary Editor's tasks.

Action=Glossary Editor

- 166.1.6 JSC: Discuss "more than one person, family, or corporate body responsible for creating the work" (5JSC/M/110.15)

The Secretary noted that this comment had originated with the second Examples Group. The Editor said that the instruction was now in chapter 13 and would be simplified. The Chair suggested that the Editorial Team look at the Examples Group's questions once chapter 13 had been re-drafted.

Action=Editorial Team

- 166.1.7 JSC: discuss the abbreviation of "Department" to "Dept." in controlled access points (5JSC/M/111.4.4)

JSC agreed to carry forward what is in AACR2, and not to abbreviate "Department".

- 166.1.8 JSC: notify ISBD Review Group and ISSN Network regarding decisions on change in type of carrier (5JSC/M114.7.2)

The Editor noted that there had been email discussion on this issue since the last meeting. JSC agreed to carry-over the discussion.

Action=JSC

- 166.1.9 JSC: discuss issue of how multiple occurrences of an element fit into an ISBD display with the ISBD Review Group (M/114.11.2)

The JSC agreed that this is an action for the Chair.

Action=Chair

- 166.1.10 JSC: discuss comments in part 1 response table on 6.4 and 6.5 (5JSC/M/116.44-45)

It was noted that discussion of these comments would be done via the wiki.

167 Statement of policy and procedures for JSC

- 167.1 Received and considered the following document:
5JSC/Policy/4/Rev

- 167.2 The Chair confirmed that no changes were required to the JSC policy document.

168 JSC program of work

- 168.1 See Appendix B.

169 Outcomes from April 2007 meeting

169.1 The JSC agreed that in future, meeting outcomes would be discussed at the end of each meeting day rather than at the end of the meeting.

Action=JSC

169.2 For the outcomes of this meeting, see: <http://www.collectionscanada.ca/jsc/0704out.html>.

Appendix A: 5JSC/Editor/RDA/Part B/Chapter 13/13.1 strawman
Draft 2007-03-25

Strawman revision of section 13.1
(Constructing access points for works, etc.)

The attached draft is a strawman revision prepared by the Editor to assist JSC in discussing the incorporation of guidelines and instructions on choosing the primary access point that were covered in the June 2006 draft of Part A, chapter 7 into Part B, chapter 13 as guidelines and instructions on constructing access points for works, etc.

The draft represents a substantially condensed and simplified version of guidelines and instructions that were given under section 7.2 in the June 2006 draft of chapter 7, reworked to serve as guidelines and instructions on “naming” works, expressions, manifestations, and items.

The draft is based on the following principles, drawn from the RDA Objectives and Principles document:

Attribution

The access points provided should reflect attributions of responsibility made either in manifestations embodying the work or expression or in reference sources, irrespective of whether the attribution of responsibility is accurate.

Common usage or practice

The formulation of name-title and title access points representing works, expressions, manifestations, and items should follow common citation practice.

Differentiation

The access point control data should serve to differentiate the entity represented by the controlled access point from other entities represented in the file.

In addition to condensing and simplifying the guidelines and instructions, and reworking them as instructions on “naming” works, expressions, manifestations, and items, the Editor has made the following substantive changes in response to constituency comments on the June 2006 draft of chapter 7:

- To the extent that specific instructions formerly given under 7.2.1-7.2.8 have been retained, they have been combined with the general guidelines formerly given under 7.2.01-7.2.0.6. (See 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 40.)
- The guidelines and instructions draw a clearer distinction between new works and new expressions of a work. (See 5JSC/RDA/Part A/Chapters 6-7/ACOC response, p. 4; 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 31 and p. 40; 5JSC/RDA/Part A/Chapters 6-7/BL response, p. 2; and 5JSC/RDA/Part A/Chapters 6-7/CILIP response, p. 6.)
- The instructions make no reference to the presentation of information on the resource being described. (See 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 3 and p. 40.)
- The alternative at 13.1.1.0.2 makes allowance for following the citation practices of specialist communities even when they conflict with the general guidelines and instructions. (See 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 31.)
- The instructions at 13.1.1.1.1 omit any specific criteria for considering a corporate body to have responsibility for a work. (See 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 42 and p. 43.)

- The instructions at 13.1.1.2.1 have been reworked to omit the “rule of three”. (See 5JSC/RDA/Part A/Chapters 6-7/ACOC response, p. 4; 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 33; and 5JSC/RDA/Part A/Chapters 6-7/LC response, p. 6. and p. 7.)
- The alternative at 13.1.1.2.2 makes allowance for including the name of more than one collaborator in the access point representing a collaborative work. (See 5JSC/RDA/Part A/Chapters 6-7/ACOC response, p. 3.)
- The instruction at 13.1.1.2.3 makes allowance for citing a collaborative work by its title in cases where the work is commonly cited in that form. (See 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 32.)
- The instruction at 13.1.1.3.1 provides for citing a compilation using the name of the compiler in cases where the work is commonly cited in that form. (See 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 32.)
- The instruction at 13.1.1.6.3 is a consolidation of the separate instructions for works for which an unknown person, and unknown family, or an unknown corporate body or unnamed group is responsible formerly given under 7.2.7.3, 7.2.7.4, and 7.2.7.5. (See 5JSC/RDA/Part A/Chapters 6-7/ACOC response, p. 5; and 5JSC/RDA/Part A/Chapters 6-7/ALA response, p. 52.)
- The guidelines and instructions on performances formerly given under 7.2.0.5 and 7.2.8 have been deleted. A footnote has been added at 13.1.1.4.1 indicating the criteria for treating a performance as an adaptation. (See 5JSC/RDA/Part A/Chapters 6-7/LC response, p. 6 and p. 8.)

None of the “additional” instructions on choosing the primary access point for musical works, art works, legal works, religious works, official communications, and academic works (formerly given under 7.7-7.12) have been included in the strawman draft. The alternative at 13.1.1.0.2 allows for adapting the general guidelines and instructions given under 13.1.1.1-13.1.1.6 to reflect citation practices in particular fields. The alternative makes reference to an appendix. If JSC determines that such an approach is viable, the proposed appendix could provide a synopsis of citation practices in fields such as music, law, religion, government, cartography, archives, etc., that could be used as the basis for adapting the general guidelines and instructions when applying the alternative.

For the purposes of the strawman draft, only a minimal number of examples have been included. The examples are derived for the most part from the June 2006 draft of chapter 7, with adjustments made as necessary to reflect the revised context and instructions.

13.1 CONSTRUCTING ACCESS POINTS FOR WORKS, ETC.

Contents

- 13.1.1 Controlled access points representing works
- 13.1.2 Controlled access points representing expressions
 - 13.1.3 Controlled access points representing manifestations and items

13.1.1 CONTROLLED ACCESS POINTS REPRESENTING WORKS

Contents

- 13.1.1.0 General guidelines on constructing controlled access points representing works
- 13.1.1.1 Works attributed to a single person, family, or corporate body
- 13.1.1.2 Collaborative works
- 13.1.1.3 Compilations of works by different persons, families, or corporate bodies
- 13.1.1.4 Adaptations and revisions
- 13.1.1.5 Commentary, annotations, illustrative content, etc. added to a previously existing work
- 13.1.1.6 Works of uncertain or unknown origin

13.1.1.0 **General guidelines on constructing controlled access points representing works**

- 13.1.1.0.1 ➤ Construct the access point representing an original work or a new work based on a previously existing work following the instructions given under 13.1.1.1–13.1.1.6.

Alternative:

- 13.1.1.0.2 In cases where citation practices in a particular field (e.g., music, law, religion) differ from those reflected in the instructions given under 13.1.1.1–13.1.1.6, adapt the instructions as necessary to reflect practice in that field (see appendix X).

- 13.1.1.0.3 ➤ If the access point constructed following the instructions given under 13.1.1.1–13.1.1.6 is the same as the access point for another work by the same person, family, or corporate body, or another work cited by the same title, make additions to the access point to differentiate it from the other work following the instructions given under 13.3.

- 13.1.1.0.4 ➤ For new expressions of an existing work (e.g., abridgements, translations, musical arrangements, etc.), follow the instructions on constructing access points representing expressions given under 13.1.2.

13.1.1.1 **Works attributed to a single person, family, or corporate body**

- 13.1.1.1.1 ➤ If responsibility for the work is attributed to a single person, family, or corporate body, and the work is commonly cited using the name of that person, family, or body, construct the access point representing the work by combining (in this order)
- a) the preferred access point for that person, family, or corporate body, formulated according to the guidelines and instructions in chapter 9, 10, or 11, as applicable
 - b) the preferred title for the work, formulated according to the instructions given under 13.2.

Hemingway, Ernest. Sun also rises

Burne-Jones, Edward. The doom fulfilled

Hines, Earl. The indispensable Earl Hines
(A selection of recordings by the jazz pianist)

Swift, Jonathan. Tale of a tub
(Originally published anonymously but known to be by Jonathan Swift)

Dennis, John. True character of Mr. Pope
(Published anonymously but generally attributed to John Dennis)

- 13.1.1.1.2 ➤ For works of uncertain attribution, follow the instructions given under 13.1.1.6.

13.1.1.2 **Collaborative works**

- 13.1.1.2.1 ➤ If the work is presented as a collaboration between two or more persons, families, or corporate bodies, and is commonly cited using the name(s) of one or more of those persons, families, or bodies, construct the access point representing the work by combining (in this order)
- a) the preferred access point for the person, family, or corporate body commonly named first when citing the work, formulated according to the guidelines and instructions in chapter 9, 10, or 11, as applicable
 - b) the preferred title for the work, formulated according to the instructions given under 13.2.

Johns, Edward. Health for effective living
(Written by Edward Johns, Wilfred C. Sutton, and Lloyd E. Webster)

Felix, Jiří. Color guide to familiar garden and field birds, eggs, and nests
(Written by Jiří Felix and illustrated by Kv-toslav Hísek)

Rosemont, Walter L. Robot

(A ballet. Music by Walter L. Rosemont, choreography by Stanislaw Povitch)

Alternative:

13.1.1.2.2

Include in the access point representing the work the preferred access points for all collaborators commonly named when citing the work (in the order commonly cited), formulated according to the guidelines and instructions in chapter 9, 10, or 11, as applicable.

Poole, E. G.; Kelk, B. Calcium montmorillonite (fuller's earth) in the Lower Greensand of the Baulking area, Berkshire

13.1.1.2.3

- If the work is commonly cited by its title, construct the access point representing the work using the preferred title for the work, formulated according to the instructions given under 13.2.

Lady from Shanghai
(A motion picture)

13.1.1.3

Compilations of works by different persons, families, or corporate bodies

13.1.1.3.1

- If the work is a compilation of works by different persons, families, or corporate bodies, and is commonly cited using the name of the compiler, construct the access point representing the work by combining (in this order)

- a) the preferred access point for the compiler, formulated according to the guidelines and instructions in chapter 9, 10, or 11, as applicable
- b) the preferred title for the compilation, formulated according to the instructions given under 13.2.

Dorfman, Robert. Economics of the environment
(Selected readings. Edited by Robert Dorfman and Nancy S. Dorfman)

Bevans, Charles I. Treaties and other international agreements of the United States of America, 1776-1949
(Compiled under the direction of Bevans)

Alternative:

13.1.1.3.2

If there is more than one compiler, include in the access point representing the compilation the preferred access points for all compilers commonly named when citing the compilation (in the order commonly cited), formulated according to the guidelines and instructions in chapter 9, 10, or 11, as applicable.

[Example]

13.1.1.3.3

- If the compilation is commonly cited by its title, construct the access point representing the work using the preferred title for the compilation, formulated according to the instructions given under 13.2.

13.1.1.3.4

- If the compilation lacks a collective title, use the access point representing the first work in the compilation as the access point for the

compilation.

Vizinczey, Stephen. In praise of older women
(*First work in a compilation without a collective title also containing
Feramontov by Desmond Cory and The graveyard shift by Harry
Patterson*)

13.1.1.4

Adaptations and revisions

- 13.1.1.4.1 > If the work is an adaptation¹ or revision of a previously existing work that substantially changes the nature and content of that work, and is presented as the work of the person, family, or body responsible for the adaptation or revision, construct the access point representing the new work by combining (in this order)
- a) the preferred access point for the person, family, or body responsible for the adaptation or revision, formulated according to the guidelines and instructions in chapter 9, 10, or 11, as applicable
 - b) the preferred title for the adaptation or revision, formulated according to the instructions given under 13.2.

Moncrieff, W. T. Sam Weller
(*A dramatization of scenes from Dickens's Pickwick papers*)

Fletcher, Frank P. Harp and psaltery
(*Paraphrases of selections from Psalms*)

Tausig, Carl. Nouvelles soirées de Vienne
(*Based on music by J. Strauss*)

Turner, C. (Charles). Children crying
forfeits
(*An engraving by Turner based on an original painting by Joshua
Reynolds*)

Winchell, Constance M. Guide to reference
books
(*A new edition based on Isadore Gilbert Mudge's sixth edition of the
same work*)

- 13.1.1.4.2 > If more than one person is responsible for the adaptation or revision, construct the access point representing the work following the instructions on collaborative works given under 13.1.1.2.
- 13.1.1.4.3 > If the adaptation or revision is commonly cited by title, use the preferred title for the adaptation or revision as the access point representing the work.

Don Giovanni
(*A film adaptation of Mozart's opera*)

- 13.1.1.4.4 > If the work is presented simply as an edition of the previously existing work, treat it as an expression of that work (i.e., use the access point representing the previously existing work). If it is considered important

¹ Treat a performance that involves a substantial level of creative responsibility for adaptation, improvisation, etc., on the part of the performer(s) as an adaptation.

for identification to name the particular expression, construct an access point representing the expression as instructed under 13.1.2.

13.1.1.5

Commentary, annotations, illustrative content, etc. added to a previously existing work

- 13.1.1.5.1 ➤ If the work consists of a previously existing work with added commentary, annotations, illustrative content etc., and it is presented as the work of the person, family, or corporate body responsible for the commentary, etc., construct the access point representing the work by combining (in this order)
- a) the preferred access point for the person, family, or body responsible for the commentary, etc., formulated according to the guidelines and instructions in chapter 9, 10, or 11, as applicable
 - b) the preferred title for the commentary, etc., formulated according to the instructions given under 13.2.

Todd, Eric C.E. The Federal Expropriation Act
(A commentary by Eric C.E. Todd that includes the text of the act)

- 13.1.1.5.2 ➤ If more than one person is responsible for the added commentary, etc., construct the access point representing the work following the instructions on collaborative works given under 13.1.1.2.

- 13.1.1.5.3 ➤ If the work is presented simply as an edition of the previously existing work, treat it as an expression of that work (i.e., use the access point representing the previously existing work). If it is considered important for identification to name the particular expression, construct an access point representing the expression as instructed under 13.1.2.

13.1.1.6

Works of uncertain or unknown origin

- 13.1.1.6.1 ➤ If the work has been attributed to one or more persons, families, or corporate bodies, but there is uncertainty as to the probable person, family, or body responsible, construct the access point for the work using the preferred title for the work, formulated according to the instructions given under 13.2.

The law scrutiny
(Variously attributed to Andrew Carmichael and William Norcott)

- 13.1.1.6.2 ➤ If reference sources indicate that one person, family, or corporate body is probably responsible for creating the work, construct the access point representing the work using the preferred access point for that person, family, or body and the preferred title for the work as instructed under 13.1.1.1).

- 13.1.1.6.3 ➤ If the person, family, or corporate body responsible for the work is unknown, or if the work originates from an unnamed group, construct the access point representing the work using the preferred title for the work, formulated according to the instructions given under 13.2.

Angry thoughts
(Person responsible unknown)

A memorial to Congress against an increase of

duties on importations
(Attributed to "citizens of Boston and vicinity")

13.1.2**CONTROLLED ACCESS POINTS REPRESENTING EXPRESSIONS**

- 13.1.2.1 ➤ Construct an access point representing a particular expression of a work by adding to the access point for the work (see 13.1.1) an element or elements identifying the expression following the instructions given under 13.3.X–13.3.X.

13.1.3**CONTROLLED ACCESS POINTS REPRESENTING
MANIFESTATIONS AND ITEMS**

- 13.1.3.1 ➤ Construct an access point representing a particular manifestation or item by adding to the access point for the work embodied in the manifestation or item (see 13.1.1) an element or elements identifying the manifestation or item following the instructions given under 13.3.X–13.3.X.

Appendix B

RDA Project Plan - B. Content Development as at 7 September 2007

(shaded dates in the timeline are those after 7 September 2007, those after the October 2007 meeting are yet to be confirmed)

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
	B.0	Overall RDA				
	B.0.1	Preparation of meeting Outcomes				
	B.0.1.1	October 2005 Outcomes			Done	2005-11-14
	B.0.1.2	April 2006 Outcomes			Done	2006-05-29
	B.0.1.3	October 2006 Outcomes			Done	2006-11-23
	B.0.1.4	April 2007 Outcomes			Done	2007-05-18
	B.0.2	Revise draft Prospectus				
	B.0.2.1	Revision after October 2005 meeting			Done	2005-12-12
	B.0.2.2	Revision after April 2006 meeting			Done	2006-06-20
	B.0.2.3	Revision after October 2006 meeting			Done	2007-03-21
	B.0.2.4	Revision after April 2007 meeting			Done	2007-06-18
	B.0.3	Revise Strategic plan				
	B.0.3.1	Revision after October 2005 meeting			Done	2005-12-12
	B.0.3.2	Revision after April 2006 meeting			Done	2006-05-29
	B.0.4	Revise Policy and procedures document			Done	2005-12-12
	B.0.5	Statement of objectives and principles				
	B.0.5.1	Revision after October 2005 meeting		B.3.3	Done	2005-12-12
	B.0.5.2	Revision before October 2006 meeting				
2006-09-18	B.0.5.2.1	Revise draft objectives and principles	Ed		Done	2006-09-18
2007-04-16	B.0.5.2.2	Discuss draft objectives and principles at meeting	JSC/Ed		Done	2007-04-19
	B.0.5.3	Revision to accompany part B				
2007-10-15	B.0.5.3.1	Discuss draft objectives and principles at meeting	Ed	IME ICC draft		
2007-12-01	B.0.5.3.4	Issue objectives and principles and post	Sec			

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
		to Web site				
	B.0.6	Add extra level of numbering				
2006-05-02	B.0.6.1	Check with online product developer that there are no negative implications to numbering change	Ed		Done	2006-05-02
2006-05-12	B.0.6.2	Change numbering for part A (chapters for review)	Ed		Done	2006-06-19
2007-06-30	B.0.6.3	Change numbering for part A (other chapters) (B.1.7.15)	Ed		Done	2007-06-30
	B.0.7	RDA Scope statement				
2006-12-15	B.0.7.1	Draft scope statement	Ed		Done	2006-12-07
2007-04-26	B.0.7.2	Revise scope analysis following JSC meeting	Ed		Done	2007-04-22
2007-05-28	B.0.7.3	Revise scope statement and element analysis following RDA/DCMI/IEEE-LOM meeting	Ed		Done	2007-05-24
2007-05-30	B.0.7.4	Informally send concrete suggestions for changes to scope statement, strategic plan, and objectives and principles	ALA rep		Done	2007-05-30
2007-05-31	B.0.7.5	Preliminary discussions on ALA suggested changes to scope statement	JSC reps		Done	2007-05-31
2007-06-04	B.0.7.6	Comment on Revised scope statement, element analysis and FRBR mapping	JSC reps		Done	2007-06-04
2007-06-11	B.0.7.7	Revise scope documents based on JSC comments	Ed		Done	2007-06-08
2007-06-14	B.0.7.8	Post scope statement and scope analysis to Web site	Sec		Done	2007-06-18
2007-10-15	B.0.7.9	Preliminary discussions on ALA suggested changes to strategic plan and objectives and principles at meeting	JSC reps			
	B.1	Part A-I of RDA (part formerly known as part I)				

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
	B.1.1	Review punctuation within elements			Done	2005-12-08
	B.1.2	Prepare GMD/SMD proposal (5JSC/Chair/6/Chair follow-up)			Done	2006-11-27
	B.1.3	Develop proposal re sources of information (for Dec 2005 draft)			Done	2005-12-08
	B.1.4	Review proposal re URLs (5JSC/ACOC/1)				
2005-11-18	B.1.4.1	Comment on ACOC rep proposal	JSC reps		Done	2005-11-28
2005-11-24	B.1.4.2	Finalize proposal re URLs	ACOC rep		Done	2005-11-29
2005-12-01	B.1.4.3	Incorporate URL proposal into draft of Part I	Ed		Done as far as possible? (Deadline revised to 2005-12-08)	2005-12-08
2006-02-13	B.1.4.4	Issue formal proposal on URLs	ACOC		Done	2006-02-10
2006-03-27	B.1.4.5	Submit responses on URLs proposal	JSC/Const		Done	2006-03-27
2006-04-24	B.1.4.6	Review responses on URLs proposal at meeting	JSC/Ed		Done	2006-04-24
2006-08-07	B.1.4.7	Revise URLs proposal	ACOC		Done	2006-08-07
2006-09-18	B.1.4.8	Submit responses to 5JSC/ACOC/1/Rev	JSC/Const		Done	2006-09-18
2006-10-16	B.1.4.9	Review responses to 5JSC/ACOC/1/Rev at meeting	JSC/Ed		Deferred	2006-10-16
2007-04-16	B.1.4.10	Review responses to 5JSC/ACOC/1/Rev at meeting	JSC/Ed		Done	2007-04-16
2007-06-30	B.1.4.11	Include outcomes of 5JSC/ACOC/1/Rev discussion in revised chapters 1-2, 4-5 (B.1.7.15)	Ed		Done	2007-06-30
	B.1.5	Prepare draft of Part I for constituency review			Done	2005-12-08

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
	B.1.6	Prepare cover letter for constituency review			Done	2005-12-09
	B.1.7	Constituency review of Part I (5JSC/RDA/Part I)				
2005-12-01	B.1.7.1	Issue draft of part I for constituency review	Ed/Sec	B.1.5/B.1.6	Done (Deadline revised to 2005-12-08)	2005-12-12
2006-01-16	B.1.7.2	Issue chapter 3	Ed/Sec	B.1.2.2	Done	2006-01-19
2006-03-20	B.1.7.3	Submit constituency responses to draft of part I	JSC/Const		Done	2006-03-20
2006-04-24	B.1.7.4	Review constituency responses to draft of part I at meeting	JSC/Ed		Done	2006-04-24
2006-05-15	B.1.7.5	Annotate own responses in first round response table	JSC reps		Done	2006-05-15
2006-05-31	B.1.7.6	Prepare second round response table and mount on Web site	Sec		Done	2006-06-05
2006-08-07	B.1.7.7	Indicate agreement/disagreement in second round response table (constituency consultation not response)	JSC reps		Done	2006-08-07
2006-08-21	B.1.7.8	Composite table on part I comments	Sec		Done	2006-08-22
2006-09-04	B.1.7.9	Final assessments on part I comments in table	JSC reps		Done	2006-09-18
2006-10-16	B.1.7.10	Discussion of part A-1 comments at meeting	JSC/Ed		Done partially (ch. 3)	2006-10-16
2006-12-01	B.1.7.11	Incorporate decisions made at meeting into revised draft of chapter 3 (B.1.16)	Ed		Done	2006-11-27
2006-12-31	B.1.7.12	Complete discussion of chapter 1 comments using wiki	JSC reps		Done	2007-02-02
2007-03-31	B.1.7.13	Complete discussion of chapter 2 comments using wiki	JSC reps		Done	2007-04-01

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
2007-04-16	B.1.7.14	Discussion of chapter 4-6 comments (and outstanding issues from chapters 1-2 and App. D at meeting)	JSC/Ed		Started chapter 1 and 2	2007-04-20
2007-06-30	B.1.7.15	Revise Introduction to part A and chapters 1-2, 4-5 to incorporate decisions made during review of constituency responses to part I	Ed	B.0.6.3/ B.1.4.11/ B.1.8.10/B.1.10.9/ B1.11.5/B.1.19.4/ B.1.20.4/B.1.22.4/ B.1.23.3	Done	2007-06-30
2007-06-29	B.1.7.16	May-June 2007 continue wiki comments for chapters 1-2	JSC reps		Done	2007-06-29
2007-09-30	B.1.7.17	August-September 2007 initial round of wiki comments for chapters 4-5	JSC reps			
2007-09-17	B.1.7.18	Identify major issues in Editor's revised drafts of chapters 1, 2, 4, 5 for priority discussion at October 2007 meeting	JSC reps			
2007-10-01	B.1.7.19	Prioritization of major issues in chapters 1, 2, 4, 5 for discussion	Chair			
2007-10-15	B.1.7.20	Review Editor's revised drafts of chapters 1, 2, 4, 5 at meeting	JSC/Ed			
2008-06-30	B.1.7.21	Finalize chapters 1, 2, 4, 5 and include in complete draft of RDA (B.5.1)	Ed			
	B.1.8	Prepare/review new proposals for Part I				
2006-02-13	B.1.8.1	Submit proposals arising from review of Part I	JSC/Const		Done	2006-02-28
2006-03-27	B.1.8.2	Submit responses to proposals	JSC/Const		Done	2006-03-27
2006-04-24	B.1.8.3	Review proposals/responses at meeting	JSC/Ed		Done	2006-04-24
2006-08-07	B.1.8.4	Submit new part A-I proposals	JSC/Const		Done	2006-08-07
2006-09-18	B.1.8.5	Submit responses to new part A proposals	JSC/Const		Done	2006-09-18
2006-10-16	B.1.8.6	Discussion of new part A proposals at meeting	JSC/Ed		Done	2006-10-16

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
2007-02-05	B.1.8.7	Submit new part A-I proposals (confirm with JSC prior to submission)	JSC/Const		Done	2007-02-05
2007-03-19	B.1.8.8	Submit responses to new part A proposals	JSC/Const		Done	2007-03-20
2007-04-16	B.1.8.9	Discussion of new part A proposals at meeting	JSC/Ed		Done	2007-04-16
2007-06-30	B.1.8.10	Include new part A proposals in revised chapters 1-2, 4-5 (B.1.7.15)	Ed		Done	2007-06-30
	B.1.9	Rules for digital media (5JSC/ALA/2)			Done	2006-11-27
	B.1.10	Internationalization (5JSC/LC/5) See also B.3.12				
2006-02-13	B.1.10.1	Proposal due on internationalization	LC		Done	2006-02-28
2006-03-27	B.1.10.2	Submit responses on internationalization proposal	JSC/Const		Done	2006-03-29
2006-04-24	B.1.10.3	Review responses on internationalization proposal at meeting	JSC/Ed		Done	2006-04-24
2006-05-30	B.1.10.4	Revise internationalization proposal	LC		Done	2006-06-21
2006-09-18	B.1.10.5	Submit responses to 5JSC/LC/5/Rev	JSC/Const		Done	2006-09-18
2006-10-16	B.1.10.6	Review responses to 5JSC/LC/5/Rev at meeting	JSC/Ed		Done partially (ch. 3)	2006-10-16
2006-12-01	B.1.10.7	Include chapter 3 decisions in revised chapter 3 (B.1.16.1)	Ed		Done	2006-11-27
2007-04-16	B.1.10.8	Review responses to 5JSC/LC/5/Rev at meeting	JSC/Ed		Done	2006-04-16
2007-06-30	B.1.10.9	Include outcomes of 5JSC/LC/5/Rev discussion in revised chapters 1-2, 4-5 (B.1.7.15)	Ed		Done	2007-06-30
2007-05-31	B.1.10.10	Include text from 5JSC/LC/5/Rev in response to 5JSC/CCC/1 (B.2.8.5)	LC		Done	2007-05-15
2007-06-29	B.1.10.11	Identify any comments from the part I response table marked as LC/5/Rev which have not been resolved	JSC reps		Done	2007-06-29

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
	B.1.11	Mode of issuance				
2006-06-30	B.1.11.1	Prepare discussion paper of mode of issuance (5JSC/Editor/RDA/Mode of issuance)	Ed		Done	2006-06-30
2006-10-16	B.1.11.2	Discuss 5JSC/Editor/RDA/Mode of issuance at meeting	JSC/Ed		Done partially (ch. 3)	2006-10-16
2006-12-01	B.1.11.3	Include chapter 3 decisions in revised chapter 3 (B.1.16.1)	Ed		Done	2006-11-27
2007-04-16	B.1.11.4	Discuss 5JSC/Editor/RDA/Mode of issuance at meeting	JSC/Ed		Done	2007-04-17
2007-06-30	B.1.11.5	Include outcome of 5JSC/Editor/RDA/Mode of issuance discussion in revised chapters 1-2, 4-5 (B.1.7.15)	Ed		Done	2007-06-30
	B.1.12	Video Format Characteristics (5JSC/LC/9)			Done	2006-11-27
	B.1.13	Specialist Cataloguing Manuals (5JSC/ALA/3)				
2006-08-07	B.1.13.1	Submit proposal	ALA		Done	2006-08-06
2006-09-18	B.1.13.2	Submit responses to 5JSC/ALA/3	JSC/Const		Done	2006-09-18
2006-10-16	B.1.13.3	Discussion of responses to 5JSC/ALA/3 at meeting	JSC/Ed		Done	2006-10-16
2007-12-31	B.1.13.4	Combine and re-organize 2 lists in ALA/3 and ALA/3/Follow-up	ALA			
2008-12-31	B.1.13.5	Include lists on JSC Web site to coincide with publication of RDA	Sec			
	B.1.14	Dimensions of binding (5JSC/CILIP/2)			Done	2006-11-27
	B.1.15	Accessible formats (5JSC/CILIP/3)			Done	2006-11-27

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
	B.1.16	Prepare draft of revised chapter 3 for constituency review			Done	2007-03-15
	B.1.17	Prepare cover letter for constituency review of Chapter 3			Done	2007-03-21
	B.1.18	Constituency review of revised chapter 3				
2007-03-21	B.1.18.1	Issue revised chapter 3 for constituency review	Ed/Sec	B.1.16/B.1.17	Done	2007-03-21
2007-07-16	B.1.18.2	Responses due on revised chapter 3	JSC/Const		BL still due	
2007-09-17	B.1.18.3	Create table for chapter 3 responses	Sec			
2007-10-15	B.1.18.4	Review constituency responses to revised chapter 3 at meeting	JSC/Ed			
2008-06-30	B.1.18.5	Finalize chapter 3 and include in complete draft of RDA (B.5.1)	Ed			
	B.1.19	New data elements for RDA arising from MARC 21 mapping				
2007-02-05	B.1.19.1	Submit proposal on new data elements for RDA	ACOC rep		Done	2007-02-05
2007-03-19	B.1.19.2	Responses due on new data elements for RDA (5JSC/ACOC rep/2)	JSC/Const		Done	2007-04-05
2007-04-16	B.1.19.3	Discussion of new data elements for RDA at meeting	JSC/Ed		Done	2007-04-17
2007-06-30	B.1.19.4	Include new data elements in revised chapters 1-2, 4-5 (B.1.7.15)	Ed		Done	2007-06-30
2007-06-29	B.1.19.5	Research terminology for events relating to the finding of objects	ACOC rep		Done	2007-08-28
2007-10-15	B.1.19.6	Discuss terminology for events relating to the finding of objects at meeting	JSC/Ed			
2008-06-30	B.1.19.7	Include any changes arising from discussion of terminology relating to the finding of events in complete draft of RDA (B.5.1)	Ed			

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
	B.1.20	Provenance/Custodial History/Immediate Source of Acquisition				
2006-12-31	B.1.20.1	Prepare revised text on Provenance/Custodial History/Immediate Source of Acquisition	CILIP rep		Done	2007-01-08
2007-03-31	B.1.20.2	Finish discussion on Provenance/Custodial History/Immediate Source of Acquisition	JSC reps		Deferred to meeting	
2007-04-16	B.1.20.3	Discussion on Provenance/Custodial History/Immediate Source of Acquisition at meeting	JSC/Ed		Done	2007-04-16
2007-05-31	B.1.20.4	Include text on Provenance/Custodial History/Immediate Source of Acquisition in revised chapter 2 (B.1.7.15)	Ed		Done	2007-05-31
	B.1.21	Extent of item for notated music (5JSC/ALA/4)				
2007-02-05	B.1.21.1	Submit proposal	ALA		Done	2007-02-05
2007-03-19	B.1.21.2	Submit responses to 5JSC/ALA/4	JSC/Const		Done	2007-03-20
2007-04-16	B.1.21.3	Discussion of responses to 5JSC/ALA/4 at meeting	JSC/Ed		Done	2007-04-16
2007-05-07	B.1.21.4	Confirm changes made at JSC meeting with MLA	ALA rep		Done	2007-05-30
2008-06-30	B.1.21.5	Include change in final chapter 3 and include in complete draft of RDA (B.5.1)	Ed			
	B.1.22	Numbering for serials (5JSC/LC/10)				
2007-02-05	B.1.22.1	Submit proposal	LC		Done	2007-02-05
2007-03-19	B.1.22.2	Submit responses to 5JSC/LC/10	JSC/Const		Done	2007-03-20
2007-04-16	B.1.22.3	Discussion of responses to 5JSC/LC/10 at meeting	JSC/Ed		Done	2007-04-17
2007-05-31	B.1.22.4	Include Numbering for serials changes in revised chapter 2 (B.1.7.15)	Ed		Done	2007-05-31
2007-08-02	B.1.22.5	Issue follow-up to 5JSC/LC/10	LC		Done	2007-08-02

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
2008-10-15	B.1.22.6	Discuss 5JSC/LC/10/LC follow-up at meeting	JSC/Ed			
	B.1.23	Sources of information				
2007-02-19	B.1.23.1	Teleconference on sources of information	JSC reps		Done	2007-02-19
2007-04-16	B.1.23.2	Discussion on Sources of information at meeting			Done	2007-04-16
2007-06-30	B.1.23.3	Include Sources of information changes in revised chapter 2 (B.1.7.15)	Ed		Done	2007-06-30
2007-06-29	B.1.23.4	Identify any comments from the part I response table marked as "Sources" which have not been resolved	JSC reps		Done	2007-06-29
	B.1.24	Discussion of CONSER standard record				
2007-04-30	B.1.24.1	General response to CONSER (for meeting on May 3rd)	Sec/ALA rep/Chair		Done	2007-04-30
2007-09-17	B.1.24.2	Prepare a document to facilitate discussion on issues for RDA raised by CONSER standard record	Chair/Sec			
2007-10-15	B.1.24.3	Discussion of issues in CONSER standard record document at meeting	JSC/Ed			
2008-06-30	B.1.24.4	Include any changes arising from discussion of CONSER standard record in complete draft of RDA (B.5.1)	Ed			
	B.1.25	Introductory words in the title (2.3.0.5) (5JSC/CILIP/5)				
2007-08-06	B.1.25.1	Prepare proposal on introductory words in the title	CILIP		Done	2007-07-31
2007-09-17	B.1.25.2	Responses due on proposal on introductory words in the title (5JSC/CILIP/5)	JSC/Const			
2007-10-15	B.1.25.3	Discussion on proposal on introductory words in the title at meeting (5JSC/CILIP/5)	JSC/Ed			

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
2008-06-30	B.1.25.4	Include any changes arising from discussion of proposal on introductory words in the title in complete draft of RDA (B.5.1)	Ed			
	B.1.26	Subject access in RDA				
2007-10-01	B.1.26.1	Prepare general statement on subject access in RDA to include with list of required elements	LC rep			
2007-10-15	B.1.26.2	Discuss subject access in RDA at meeting	JSC/Ed			
2008-06-30	B.1.26.3	Include text on subject access in RDA in complete draft of RDA (B.5.1)	Ed			
	B.2	Part A-II of RDA (part formerly known as part II)				
	B.2.1	Preliminary draft of part II			Done	2006-04-24
	B.2.2	Levels of access (5JSC/ACOC rep/1)				
	B.2.3	Archival rules (5JSC/LC/3)				
	B.2.4	Prepare draft of Part A-II for constituency review			Done	2006-06-20
	B.2.5	Prepare cover letter for constituency review			Done	2006-06-20
	B.2.6	Constituency review of part A-II				
2006-06-20	B.2.6.1	Issue draft of part A-II for constituency review	Ed/Sec	B.2.4/B.2.5	Done	2006-06-20
2006-09-18	B.2.6.2	Submit constituency responses to draft of chapters 6-7	JSC/Const		Done (Extended to 2006-09-25)	2006-09-25

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
2006-10-16	B.2.6.3	Review constituency responses to June 2006 draft of chapters 6-7 at meeting	JSC/Ed		Done (major issues)	2006-10-16
2007-01-05	B.2.6.4	Prepare alternative outlines for a revised chapter on related resources (B.2.9.1)	Ed		Done	2006-12-13
2007-04-02	B.2.6.5	Prepare response table for constituency responses to June 2006 draft of chapters 6-7	Sec	B.2.9.3	Done	2007-04-02
2007-04-16	B.2.6.6	Review constituency responses to June 2006 draft of chapters 6-7 at meeting	JSC/Ed		Done at high level?	2007-04-18
2007-05-15	B.2.6.7	Include outcome of discussions on constituency responses to June 2006 draft of chapters 6-7 in revised chapters 6-7 (B.2.10.1)	Ed		Done	2007-04-25
	B.2.7	Prepare/review new proposals for Part A-II				
2006-08-07	B.2.7.1	Submit proposals arising from review of Part A-II	JSC/Const		Done	2006-08-07
2006-09-18	B.2.7.2	Submit responses to proposals arising from Part A-II	JSC/Const		Done	2006-09-18
2006-10-16	B.2.7.3	Review proposals/responses to Part A-II proposals at meeting	JSC/Ed		Deferred	2006-10-16
2007-04-16	B.2.7.4	Review proposals/responses to Part A-II proposals at meeting	JSC/Ed		Discussed with part B	2007-04-19
2007-05-15	B.2.7.5	Include new part A-II proposals in revised chapters 6-7 (B.2.10.1)	Ed		N/A	
	B.2.8	Other agreements involving jurisdictions (5JSC/CCC/1)				
2006-08-07	B.2.8.1	Submit proposal	CCC		Done	2006-08-07
2006-09-18	B.2.8.2	Submit responses to 5JSC/CCC/1	JSC/Const		Done	2006-09-18
2006-10-16	B.2.8.3	Discussion of responses to 5JSC/CCC/1 at meeting	JSC/Ed		Deferred	2006-10-16
2007-04-16	B.2.8.4	Discussion of responses to 5JSC/CCC/1	JSC/Ed		Done	2007-04-19

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
		at meeting				
2007-05-31	B.2.8.5	Revise response to CCC/1	LC (CILIP rep to contribute)		Done	2007-05-15
2007-08-06	B.2.8.6	Issue response to 5JSC/CCC/1/LC response/LC follow-up	ALA		Done	2007-08-06
2007-09-17	B.2.8.7	Responses due on 5JSC/CCC/1/LC response/LC follow-up/ALA follow-up	JSC/Const			
2007-10-15	B.2.8.8	Discussion of responses to 5JSC/CCC/1/LC response/Rev/ALA follow-up at meeting	JSC/Ed			
2007-11-01	B.2.8.9	Incorporate changes to primary access for treaties etc. agreed at October 2007 JSC meeting into Part B (B.3.7.1)	Ed			
	B.2.9	Revised chapters 6-7 (for April 2007 meeting)				
2007-01-05	B.2.9.1	Prepare alternative outlines for chapter 7 (formerly chapter 6)	Ed		Done	2006-12-13
2007-02-09	B.2.9.2	Complete review of alternative outlines for chapter 7 (formerly chapter 6)	JSC reps		Done	2007-02-13
2007-03-19	B.2.9.3	Revise chapters 6-7 to incorporate decisions made at October 2006 meeting and on ch. 7 alternative outlines	Ed		Done	2007-03-19
2007-04-16	B.2.9.4	Review Editor's revised draft of chapters 6-7 at meeting (B.2.10.1)	JSC/Ed		Done	2007-04-18
	B.2.10	Prepare draft of revised chapters 6-7 for constituency review				
2007-05-15	B.2.10.1	Revise chapters 6-7 to incorporate decisions made at April 2007 meeting	Ed	B.2.6.7/B.2.7.5/B.2.9.4	Done	2007-04-25
2007-05-21	B.2.10.2	Prepare starter list of relationship designators (5JSC/Restricted/ALA rep/1)	ALA rep		Done	2007-05-22
2007-05-31	B.2.10.3	Complete review of Editor's draft of chapters 6-7	JSC reps		Done	2007-05-31

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
2007-06-01	B.2.10.4	Prepare starter list of role designators (5JSC/Restricted/LC rep/1)	LC rep		Done	2007-05-25
2007-06-06	B.2.10.5	Comment on lists of role and relationship designators	JSC reps		Done	2007-06-07
2007-06-08	B.2.10.6	Revise chapters 6-7 to incorporate JSC comments	Ed		Done	2007-06-08
2007-06-15	B.2.10.7	Incorporate changed examples in revised chapters 6-7 (B.2.12.1)	Ed	B.4.4.6	Done	2007-06-15
	B.2.11	Prepare cover letter for constituency review				
2007-05-25	B.2.11.1	Identify issues for inclusion in cover letter for revised ch 6-7	Chair/Sec		Done	2007-05-25
2007-06-01	B.2.11.2	Draft cover letter for revised ch 6-7	Chair		Done	2007-05-28
2007-06-04	B.2.11.3	Comment on cover letter	JSC reps		Done	2007-06-04
2007-06-11	B.2.11.4	Finalize cover letter (B.2.12.1)	Chair		Done	2007-06-17
	B.2.12	Constituency review of revised ch 6-7				
2007-06-18	B.2.12.1	Issue revised chapters 6-7 for constituency review	Ed/Sec	B.2.10/B.2.11	Done	2007-06-18
2007-09-17	B.2.12.2	Responses due on revised chapters 6-7	JSC/Const			
2007-10-15	B.2.12.3	Review constituency responses to revised chapters 6-7 at meeting	JSC/Ed			
2008-06-30	B.2.12.4	Finalize chapters 6-7 and include in complete draft of RDA (B.5.1)	Ed			
	B.2.13	Designations of roles and relationships				
2007-09-17	B.2.13.1	Issue revised versions of 5JSC/ALA rep/1 and 5JSC/LC rep/ 1	ALA rep, LC rep			
2007-10-15	B.2.13.2	Discussion on revised versions of 5JSC/ALA rep/1 and 5JSC/LC rep/ 1 at meeting	JSC/Ed			
2007-12-01	B.2.13.3	Issue lists of designations of roles and relationships for constituency review.	JSC			

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
	B.3	Part B of RDA				
	B.3.1	Names of families (5JSC/LC/6)				
2006-02-13	B.3.1.1	Submit proposal on names of families	LC		Done	2006-02-28
2006-03-27	B.3.1.2	Submit responses to proposal on names of families	JSC/Const		Done	2006-03-27
2006-04-24	B.3.1.3	Review proposal/responses on names of families at meeting	JSC/Ed		Done	2006-04-24
2006-05-15	B.3.1.4	Obtain more information on international standards for archival materials	CCC rep		Done	2006-05-04
2006-08-07	B.3.1.5	Make decision on names of families - part A-II issues	JSC reps		Done	2005-05-17
2006-10-16	B.3.1.6	Make decision on names of families - part B issues	JSC reps		Deferred	2006-10-16
2007-04-16	B.3.1.7	Make decision on names of families - part B issues at meeting	JSC reps		Discussed	2007-04-19
2007-09-17	B.3.1.8	Prepare proposal on names of families	ACOC or ACOC rep (LAC to contribute)			
2007-10-15	B.3.1.10	Discussion on proposal on names of families at meeting	JSC/Ed			
2007-11-01	B.3.1.11	Incorporate names of families changes agreed at October 2007 JSC meeting into Part B (B.3.7.1)	Ed			
	B.3.2	Functional requirements for part B			Not required	
	B.3.3	Objectives and principles for part B				
2006-03-27	B.3.3.1	Revise Objectives and principles to include part B	Ed		Done	2006-04-13
2006-04-24	B.3.3.2	Discussion on revised Objectives and principles at meeting	JSC/Ed		Done	2006-04-24
	B.3.4	Preliminary draft of part B				
2006-09-18	B.3.4.1	Preliminary draft of part B completed	Ed		Done	2006-09-18
2006-09-18	B.3.4.2	Preliminary draft of part B on Workspace	Sec		Done	2006-09-19

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
2006-10-16	B.3.4.3	Discussion on preliminary draft of part B at meeting	JSC/Ed		Deferred	2006-10-16
2007-03-26	B.3.4.4	Prepare outline for revised chapter 13 (Changed to Strawman for 13.1)	Ed		Done	2007-03-26
2007-04-16	B.3.4.5	Review Editor's draft of part B chapters 8-12, 14; and strawman for 13.1 at meeting	JSC/Ed		Done	2007-04-19
2007-06-29	B.3.4.6	Complete review of Editor's preliminary draft of part B	JSC reps		Done	2007-07-03
2007-09-17	B.3.4.7	Revise draft of part B to incorporate comments from April 2007 meeting and subsequent review	Ed	B.3.5.3/B.3.6.3/ B.3.11.6		
2007-10-15	B.3.4.8	Review Editor's revised draft of part B at meeting (B.3.7.1)	JSC/Ed			
	B.3.5	Levels of access (5JSC/ACOC rep/1)				
2006-10-16	B.3.5.1	Discussion of outstanding part B issues on levels at meeting	JSC/Ed		Deferred	2006-10-16
2007-04-16	B.3.5.2	Discussion of outstanding part B issues on levels at meeting	JSC/Ed		Done	2007-04-20
2007-09-17	B.3.5.3	Incorporate outcome of levels discussion into draft of part B (B.3.4.7)	Ed			
	B.3.6	Archival rules (5JSC/LC/3)				
2006-10-16	B.3.6.1	Discussion of outstanding part B issues on archival rules at meeting	JSC/Ed		Deferred	2006-10-16
2007-04-16	B.3.6.2	Discussion of outstanding part B issues on archival rules at meeting	JSC/Ed		Done	2007-04-19
2007-09-17	B.3.6.3	Incorporate outcome of archival rules discussion into draft of part B (B.3.4.7)	Ed			
	B.3.7	Prepare draft of Part B for constituency review				

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
2007-11-01	B.3.7.1	Incorporate changes agreed at October 2007 JSC meeting into Part B	Ed	B.2.8.9/B.3.1.11/ B.3.4.8/B.3.12.4/ B.3.13.4/B.3.14.4		
2007-11-15	B.3.7.2	Comment on revised draft of Part B	JSC reps			
2007-11-15	B.3.7.3	Incorporate changed examples in draft of part B	Ed	B.4.4.9		
2007-12-01	B.3.7.4	Finalize draft of Part B (B.3.9)	Ed			
	B.3.8	Prepare cover letter for constituency review				
2007-11-01	B.3.8.1	Identify issues for inclusion in cover letter for Part B	Chair/Sec			
2007-11-15	B.3.8.2	Draft cover letter for part B	Chair			
2007-12-01	B.3.8.3	Finalize cover letter for draft of part B (B.3.9)	Chair			
	B.3.9	Constituency review of Part B				
2007-12-01	B.3.9.1	Issue draft of part B for constituency review	Ed/Sec	B.3.7/B.3.8		
2008-03-01	B.3.9.2	Submit constituency responses to draft of part B	JSC/Const			
2008-04-14	B.3.9.3	Review constituency responses to draft of part B at meeting	JSC/Ed			
2008-06-30	B.3.9.4	Finalize Part B and include in complete draft of RDA (B.5.1)	Ed			
	B.3.10	Prepare/review new proposals for Part B				
2008-02-04	B.3.10.1	Submit proposals arising from review of Part B	JSC/Const			
2008-03-17	B.3.10.2	Submit responses to proposals arising from Part B	JSC/Const			
2008-04-14	B.3.10.3	Review proposals/responses arising from part B at meeting	JSC/Ed			
2008-06-30	B.3.10.4	Include new proposals in final draft of part	Ed			

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
		B (B.5.1)				
	B.3.11	Bible Uniform Titles (5JSC/LC/8)				
2006-06-01	B.3.11.1	Submit proposal	LC		Done	2006-06-01
2006-09-18	B.3.11.2	Submit responses to 5JSC/LC/8	JSC/Const		Done	2006-09-25
2006-10-16	B.3.11.3	Discussion of responses to 5JSC/LC/8 at meeting	JSC/Ed		Deferred	2006-10-16
2007-04-16	B.3.11.4	Discussion of responses to 5JSC/LC/8 at meeting	JSC/Ed		Done	2007-04-19
2007-08-06	B.3.11.5	Issue follow-ups to responses to 5JSC/LC/8	JSC/Const		Done	2007-08-14
2007-09-17	B.3.11.6	Include outcome of 5JSC/LC/8 discussion in revised part B (if agreement) (B.3.4.7)	Ed			
	B.3.12	Internationalization of Part B (including names of places) 5JSC/Restructed/LC rep/2				
2007-08-06	B.3.12.1	Submit proposal on internationalization of part B	LC		Done	2007-07-13
2007-10-15	B.3.12.2	Discussion on 5JSC/Restricted/LC rep/2 at meeting and decide what to go to constituencies	JSC/Ed			
2007-11-01	B.3.12.3	Incorporate outcomes of internationalization of part B discussion into revised part B (B.3.7.1)	Ed			
	B.3.13	Paper on IME ICC form of uniform titles				
2007-08-06	B.3.13.1	Submit paper on IME ICC form of uniform titles	CILIP rep		Done	2007-08-06
2007-09-17	B.3.13.2	Responses due on paper on IME ICC form of uniform titles (5JSC/CILIP rep/1)	JSC/Const			
2007-10-15	B.3.13.3	Discussion on paper on IME ICC form of uniform titles at meeting (5JSC/CILIP rep/1)	JSC/Ed			
2007-11-01	B.3.13.4	Incorporate outcomes of IME ICC form of uniform titles discussion into revised part	Ed			

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
		B (B.3.7.1)				
	B.3.14	Rule revision proposals on uniform titles (tbc)				
2008-02-04	B.3.14.1	Submit proposal on uniform titles	LC			
2008-03-17	B.3.14.2	Responses due on uniform titles proposal	JSC/Const			
2008-04-14	B.3.14.3	Discussion on uniform titles proposal at meeting	JSC/Ed			
2008-06-30	B.3.14.4	Include new proposals in final draft of part B (B.5.1)	Ed			
	B.4	Other RDA				
	B.4.1	General Introduction				
2007-12-01	B.4.1.1	Draft General Introduction	Ed	B.0.5/B.3.3		
2008-04-14	B.4.1.2	Review Editor's draft of General Introduction at meeting	JSC/Ed			
2008-06-30	B.4.1.3	Revise General Introduction and include in complete draft of RDA (B.5.1)	Ed			
	B.4.2	Revision of Appendices (see also B.4.11, B.4.12)				
2006-03-27	B.4.2.1	Issue a charge for Appendices working group	Chair/CILIP rep		Draft circulated	2006-04-04
2006-04-24	B.4.2.2	Creation of a working group on appendices at meeting	JSC/Ed		Done	2006-04-24
2006-06-15	B.4.2.3	Finalize charge and membership for working group on appendices	Chair		Done	2006-07-04
2006-09-18	B.4.2.4	First progress report on Appendices	Appendices WG		Done	2006-09-18
2006-10-16	B.4.2.5	Discussion on progress report on appendices at meeting	JSC/Ed		Done	2006-10-16

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
2007-01-31	B.4.2.6	Revision of appendices as relate to chapter 3	Appendices WG		Suggestions submitted by WG Chair	2007-02-08
2007-03-19	B.4.2.7	Status report on work on appendices	Appendices WG		Done	2007-03-15
2007-04-16	B.4.2.8	Discuss status report on work on appendices at meeting	JSC/Ed		Done	2007-04-20
2007-06-29	B.4.2.9	Proposal on how appendices A-C should be structured and sample text (so that requirements for authoring software can be determined)	Appendices WG		Done	2007-07-02
2007-09-17	B.4.2.10	Status report on work on appendices and submission of Appendix C (initial articles)	Appendices WG	B.4.7.4/B.4.8.4/ B.4.9.4		
2008-03-01	B.4.2.11	Complete Appendices A-B	Appendices WG	B.3.7		
2008-04-14	B.4.2.12	Discussion on appendices A-B at meeting	JSC/Ed			
2008-06-30	B.4.2.13	Include Appendices in complete draft of RDA (B.5.1)	Ed			
	B.4.3	Review of Examples (5JSC/Chair/1) - Group 1				
2005-11-01	B.4.3.1	Respond to Examples Group with status report	CCC rep		Done	2005-11-01
2006-03-27	B.4.3.2	Report on Examples in part I	Examples WG		Done (Deadline revised to 2006-04-13)	2006-04-11
2006-04-24	B.4.3.3	Discussion on report on examples in part I at meeting	JSC/Ed		Done	2006-04-24
2006-06-01	B.4.3.4	Sort out membership of Examples Group and Chair for remaining chapters	Chair		Done	2006-06-27
2006-10-16	B.4.3.5	Resolution of part A-I instructions to do with examples at meeting	JSC/Ed		Deferred	2006-10-16

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
2006-12-04	B.4.3.6	Begin review of examples to reflect changes to chapter 3 and appendices	1st Examples WG	B.1.16.1	Done	2006-12-04
2007-03-09	B.4.3.7	Complete review of examples to reflect changes to chapter 3 and appendices (B.1.16.5)	1st Examples WG	B.1.16.3/B.4.2.6	Done	2007-03-15
2007-09-17	B.4.3.8	Revise examples in chapters 1-5 to reflect changes in those chapters and appendices	1st Examples WG	B.1.7.15		
2007-10-15	B.4.3.9	Review revised examples for part A and B at meeting	JSC/Ed			
	B.4.4	Review of Examples (5JSC/Chair/1) - Group 2				
2006-06-15	B.4.4.1	Set up second Examples WG	Chair		Done	2006-06-27
2006-09-18	B.4.4.2	Status report on examples in part A-II	2nd Examples WG		Done	2006-09-18
2006-10-16	B.4.4.3	Discussion of report on examples in part A-II at meeting	JSC/Ed		Done	2006-10-16
2007-03-30	B.4.4.4	Begin to revise examples in ch 6-7 to reflect changes to those chapters and appendices (priority for draft for review: correcting examples and adding missing examples)	2nd Examples WG	B.2.9.3	Started	2007-03-20
2007-05-07	B.4.4.5	Report to Examples Group 2 on decisions at April 2007 meeting	Chair		Done	2007-05-04
2007-06-11	B.4.4.6	Complete revision of examples in ch 6-7 (as above) (B.2.10.7)	2nd Examples WG		Done	2007-06-11
2007-09-17	B.4.4.7	Begin revising examples for part B	2nd Examples WG	B.3.4.7		
2007-10-15	B.4.4.8	Review revised examples for part A and B at meeting	JSC/Ed			
2007-11-15	B.4.4.9	Complete revision of examples for part B (B.3.7.3)	2nd Examples WG			
	B.4.5	Review of Examples (5JSC/Chair/1) - Final				

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
2008-01-01	B.4.5.1	Begin incorporating revisions and additions to examples	Examples Groups	Plan E: Editorial platform		
2008-06-30	B.4.5.2	Finish incorporating revisions and additions to examples in complete draft of RDA (B.5.1)	Examples Groups	Plan E: Editorial platform		
	B.4.6	Revision of Glossary				
2006-04-24	B.4.6.1	Discuss 5JSC/Policy/3/Rev at meeting	JSC/Ed		Done	2006-04-24
2006-05-12	B.4.6.2	Send out final draft of 5JSC/Policy/3/Rev	Chair		Done	2006-05-15
2006-05-15	B.4.6.3	Issue final draft of 5JSC/Policy/3/Rev	Sec		Done	2006-05-18
2006-05-30	B.4.6.4	Pull together all Glossary comments arising from review of part I	ALA rep		Done	2006-05-30
2006-09-18	B.4.6.5	Document on Glossary terms	Sally Strutt		Done	2006-09-18
2006-10-16	B.4.6.6	Discussion of outstanding part I Glossary comments at meeting	JSC/Ed		Deferred	2006-10-16
2007-04-16	B.4.6.7	Provide direction for Glossary revisions at meeting	JSC/Ed		Deferred	
2007-10-01	B.4.6.8	Engage Glossary Editor	JSC reps			
2007-11-30	B.4.6.9	Update tables 1 & 2 of 5JSC/Chair/11 to include terms defined in the RDA text for Part A ; and to incorporate comments from constituency responses	Glossary Editor	B.1.7.15/B.1.11.5 /B.2.12.2		
2008-02-01	B.4.6.10	Report to JSC on any issues which arise from update of tables	Glossary Editor			
2008-02-18	B.4.6.11	Makes decisions/provide guidance on part A Glossary issues	JSC reps			
2008-03-01	B.4.6.12	Update tables 1 & 2 of 5JSC/Chair/11 to include terms defined in the RDA text for Part B; and to incorporate comments from constituency responses	Glossary Editor	B.3.9.2		
2008-03-17	B.4.6.13	Present updated tables for both Part A and Part B, and any remaining issues, for JSC resolution at the April 2008 meeting	Glossary Editor			
2008-04-14	B.4.6.14	Review constituency responses to Glossary and to terms defined in RDA at	JSC/Ed			

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
		meeting				
2008-06-15	B.4.6.15	Finalise Glossary terms & definitions to be used in RDA in RDA authoring product for complete draft due end June 2008	Glossary Editor			
2008-06-15	B.4.6.16	Finalize terms used in text of RDA	Ed			
2008-12-31	B.4.6.17	Final changes made to Glossary in RDA authoring product (June-Dec 2008)	Secretary			
	B.4.7	Breton initial articles (5JSC/LC/7)				
2006-04-20	B.4.7.1	Submit proposal	LC		Done	2006-04-20
2006-09-18	B.4.7.2	Submit responses to 5JSC/LC/7	JSC/Const		Done	2006-09-18
2006-10-16	B.4.7.3	Discussion of responses to 5JSC/LC/7 at meeting	JSC/Ed		Done	2006-10-16
2007-09-17	B.4.7.4	Include 5JSC/LC/7 in Appendix C (Initial articles) (B.4.2.10)	Appendices WG			
	B.4.8	Maori & Pacific Island initial articles (5JSC/ACOC/2)				
2006-08-07	B.4.8.1	Submit proposal	ACOC		Done	2006-08-01
2006-09-18	B.4.8.2	Submit responses to 5JSC/ACOC/2	JSC/Const		Done	2006-09-18
2006-10-16	B.4.8.3	Discussion of responses to 5JSC/ACOC/2 at meeting	JSC/Ed		Done	2006-10-16
2007-09-17	B.4.8.4	Include 5JSC/ACOC/2 in Appendix C (Initial articles) (B.4.2.10)	Appendices WG			
	B.4.9	Irish initial articles (5JSC/CILIP/4)				
2006-08-07	B.4.9.1	Submit proposal	CILIP		Done	2006-08-03
2006-09-18	B.4.9.2	Submit responses to 5JSC/CILIP/4	JSC/Const		Done	2006-09-18
2006-10-16	B.4.9.3	Discussion of responses to 5JSC/CILIP/4 at meeting	JSC/Ed		Done	2006-10-16
2007-09-17	B.4.9.4	Include 5JSC/CILIP/4 in Appendix C (Initial articles) (B.4.2.10)	Appendices WG			
	B.4.10	RDA and MARC				

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
2006-08-07	B.4.10.1	Mapping MARC21 to RDA	ACOC and CCC		Done	2006-09-27
2006-09-18	B.4.10.2	Prepare discussion paper on RDA and MARC21	ACOC and CCC		Done	2006-09-27
2006-10-16	B.4.10.3	Review discussion paper on RDA and MARC21 at meeting	JSC/Ed		Done	2006-10-16
2006-12-01	B.4.10.4	Submit report to MARBI	JSC reps		Done	2006-11-17
2007-04-16	B.4.10.5	Discuss outcomes of MARBI meeting at JSC meeting	JSC/Ed		Done	2007-04-16
2007-09-01	B.4.10.6	Mapping RDA to MARC21	ACOC rep, CCC rep, BL rep, ALA rep	B.1.7.15	ALA rep still due	
2007-10-15	B.4.10.7	Discuss next paper for MARBI at meeting	JSC/Ed			
2007-10-15	B.4.10.8	Discuss mapping of RDA to MARC 21 at meeting and incorporation of mapping in Appendix	JSC/Ed			
2007-12-01	B.4.10.9	Submit paper to MARBI	Chair via CCC rep			
2008-11-30	B.4.10.10	Final mappings RDA/MARC 21 and MARC 21/RDA	ACOC and CCC	B.5.1		
	B.4.11	Appendix D (Display of descriptive data)		B.4.10		
2007-10-15	B.4.11.1	Discuss Appendix D at meeting	JSC/Ed			
	B.4.12	Appendix E (Access point data)				
2007-10-15	B.4.12.1	Discuss Appendix E at meeting (JSC has to agree on the presentation standard in addition to mapping to the MARC21 authorities format)	JSC/Ed			
	B.5	Final drafts of RDA				

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
2008-06-30	B.5.1	Completion of final drafts of Parts A, B, and Gen Intro	Ed	B.1.7.21/B.1.18.5/ B.1.19.7/B.1.21.5/ B.1.24.4/ B.1.25.4/ B.2.12.4/ B.3.9.4/B.3.10.4/ B.4.1.3/B.4.2.13/ B.4.5.2/B.4.6.15		
2008-07-01	B.5.2	Begin pre-publication editorial review (copy-editing, etc.)	Secretary (tbc)			
2008-09-15	B.5.3	Review complete draft of RDA	JSC/Const			
2008-10-01	B.5.4	Review comments on complete draft of RDA at meeting	JSC/Ed			
2008-11-30	B.5.5	Complete finalization of text incorporating decisions made at October 2008 meeting	Ed			
2008-12-31	B.5.6	Complete pre-publication editorial review (copy-editing, etc.)	Secretary (tbc)			
	B.6	Metadata tagging				
2008-03-01	B.6.1	Add metadata to part A	Ed	Plan E: Editorial platform		
2008-06-30	B.6.2	Add metadata to part B	Ed	B.5.1		
2008-09-15	B.6.3	Add metadata to General Introduction, Appendices, Glossary as necessary	Ed			
2008-12-31	B.6.4	Revise metadata in complete draft of RDA	Ed			
	B.7	Indexing				
2008-04-14	B.7.1	Develop RDA indexing guidelines at meeting	JSC/Ed			
2008-12-31	B.7.2	Index text	Ed	B.5.6?		

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
	Actions for other project plans					
		Risk management for Project Plan B			Done	2006-07-14
		Making JSC documents publicly available			Done	2006-06-20
		Options				
2008-10-01		BL, LAC, LC, NLA to make decisions on application of options in RDA				
2008-12-01		Other key implementation bodies to make decisions on application of options in RDA				
		Preparation of material to be used to train trainers				
2007-09-17		Submit work to date on training and issues to the JSC	Sec			
2007-10-15		Discussion on "train the trainer" material at meeting	JSC/Ed			
		Discussion of loss of key personnel after 2009				
2008-04-14		Discussion on loss of key personnel at meeting	JSC			
		Develop user scenarios for prototype				
2007-10-15		Give user scenarios to Jenni Fry at meeting	JSC			

Timeline	Reference	Task	Responsibility	Dependency	Status	Date completed
		Name change for JSC on Web sites				
2007-06-29		Prepare discussion paper on JSC Web sites	Sec		Done	2007-06-28
		Participation by JSC in IME ICC process				
2007-06-08		Submit IME ICC voting forms?	JSC reps			