

**JOINT STEERING COMMITTEE FOR DEVELOPMENT OF RDA**

**MINUTES OF APRIL 2008 MEETING**

**ALA Headquarters, Chicago, USA**

**13-22 April 2008**

**[Note: does not include Executive Sessions]**

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**Minutes:** of the thirty-sixth meeting of the Committee held at ALA Headquarters, Chicago, USA, 13-22 April 2008.

**Present:** Deirdre Kiorgaard, Australian Committee on Cataloguing, in the Chair  
 John Attig, American Library Association  
 Marjorie Bloss, RDA Project Manager  
 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

Observers in attendance:

Alex Bloss

Renette Davis, University of Chicago Library

Judith A. Kuhagen, Library of Congress

Kevin Randall, Northwestern University Library

Adam L. Schiff, University of Washington Libraries

Joan Schuitema, University of Illinois at Chicago

Larisa Walsh, University of Chicago Library

## **Executive Session 1**

### **216 RDA Project Manager's report**

216.1 [Note: included in 5JSC/M/Restricted/216-265.]

### **217 Collaboration with other resource description communities**

217.1.1 [Note: included in 5JSC/M/Restricted/216-265.]

### **218 Strategic plan for RDA 2005-2009**

218.1 Received and considered the following document:  
 5JSC/Strategic/1/Rev/2

218.2 [Note: included in 5JSC/M/Restricted/216-265.]

### **219 RDA indexing**

219.1 [Note: included in 5JSC/M/Restricted/216-265.]

### **220 Concise RDA**

220.1 Received and considered the following document:  
 5JSC/Restricted/Chair/10

220.2 [Note: included in 5JSC/M/Restricted/216-265.]

**221 RDA editing**

221.1 [Note: included in 5JSC/M/Restricted/216-265.]

**222 List of Specialist Cataloguing Manuals for RDA**

222.1 Received and considered the following document:  
5JSC/ALA/3/Rev

222.1.1 [Note: included in 5JSC/M/Restricted/216-265.]

**End of Executive Session 1**

**223 Approval of the agenda**

- 223.1 The following documents were added to the agenda (5JSC/A/7):  
5JSC/LC rep/2 (agenda item 16)  
5JSC/LC/12/ALA response/ALA follow-up (agenda item 17)  
5JSC/Annual report/2007 (agenda item 20)
- 223.2 The Secretary noted that the following document was listed incorrectly on the agenda: 5JSC/RDA/RDA to FRAD mapping/Rev, and should be 5JSC/RDA/RDA to FRAD mapping.
- 223.3 The following agenda items were not discussed: 46 (Chair's preface to RDA); 50 (Outcomes from April 2008 meeting, for the outcomes see <http://www.collectionscanada.ca/jsc/0804out.html>).

**224 Minutes of the previous meeting held 15-20 October 2007**

- 224.1 Received and considered the following documents:  
5JSC/M/170-215  
5JSC/M/Restricted/170-215
- 224.2 The minutes were accepted. The JSC members recorded their appreciation to the Secretary for completing the minutes to a high standard.
- 224.3 The JSC agreed to discuss actions arising from the October 2007 meeting at the appropriate places in the agenda.

**225 Revised draft of RDA General Introduction**

- 225.1 Received and considered the following document:  
5JSC/Editor/RDA/General Introduction/Rev
- 225.2 The Chair explained that a discussion guide had been prepared listing suggested changes to the General Introduction on which there was no consensus. She noted that there was also a comparison table for 0.5.1.1 (Responsiveness to user needs). The Chair led a discussion on each of the numbered suggestions in the discussion guide
- 225.3 1. The addition of references to the IME-ICC *Statement of International Cataloguing Principles* in the footnotes to 0.1.2 and 0.1.3.
- 225.3.1 The Chair said that LC wanted it acknowledged in the footnotes that the lists at 0.1.2 and 0.1.3 are also in the IME ICC *Statement*. Barbara Tillett said that the IME ICC principles explained the user tasks, and had modified the tasks as found in FRBR and FRAD. John Attig noted that as the *Statement* was still being developed it was important to track where it had been referred to in RDA, and make sure that this was still accurate. The JSC decided to wait to make any change to the footnotes.
- 225.4 2. The addition of "navigate" as a user task under 0.1.3.
- 225.4.1 Barbara Tillett explained that "navigate" was both in FRAD and the IME ICC *Statement*. She noted that the CILIP rep had pointed out that "navigate" was not a task in itself but an



intermediate stage in achieving the other tasks. The JSC agreed to discuss this with 0.5.1.1 (see 5JSC/M/225.11.10).

- 225.5 3. The addition of a reference to the IME-ICC *Statement of International Cataloguing Principles* under “Relationship to other standards for resource description and access” at 0.3.
- 225.5.1 The JSC decided that this was not necessary, as the statement is covered at 0.5 (Objectives and principles covering resource description and access).
- 225.6 4. The wording of a statement about the relationship between RDA and guidelines for resource description used by other communities (archives, museums, etc.) and/or consultations with those communities, to be included under 0.3.
- 225.6.1 The JSC agreed with the wording proposed by CCC: “Consideration has been given to the metadata standards used in other communities (archives, museums, publishers, etc.) to attain an effective level of alignment between those standards and RDA.” Barbara Tillett suggested that the Semantic Web and Dublin Core be included in the parenthetical statement. The JSC agreed.
- Action=Editor**
- 225.7 5. The inclusion of a reference to the list of cataloguing resources being compiled by ALA. (A placeholder has been retained at 0.3.6, pending a decision from JSC on whether such a reference should be included.)
- 225.7.1 The JSC discussed 5JSC/ALA/3/ALA follow-up, and noted that very few of the resources listed had been consulted in the development of RDA, and that a number of them were actually manuals of interpretation for AACR2. The JSC decided that a hyperlink to the list in 5JSC/ALA/3/ALA follow-up did not belong in the section of the General Introduction on the relationship to other standards for resource description and access. John Attig commented that the resources listed would be useful if you wanted to go beyond the instructions in RDA. The Editor noted that the ALA list would be in the Tools section in the online product and very visible at the top page of RDA. The Chair said that in the future the JSC might want to link to specific resources from the General Introduction. The JSC decided not to list the standards from other resource description communities which had been consulted, but to only have the statement previously agreed for 0.3.
- 225.7.2 John Attig asked whether the ALA list would be mounted on the JSC Web site or the RDA Web site. It was agreed that there would be a link from RDA online to the JSC Web site. The Chair noted that the JSC had asked the CoP to consider at their meeting the future of the three existing public Web sites (the JSC site, the AACR2 site managed by the co-publishers, and the RDA site that currently hosts the prototype).
- 225.8 6. The wording of statements under 0.4.1 and 0.4.2 on the scope of RDA relative to the current release and future releases.
- 225.8.1 The JSC decided to retain the statement at 0.4.1.3 (about attributes and entities supporting user tasks related to resource management being currently out of scope), and to include in the Preface a general statement about scope.
- Action=Chair (Preface)**
- 225.8.2 The Editor noted that the statement at 0.4.1.2 was a different situation because it linked the scope of RDA to the extension of FRBR.

225.8.3 The JSC discussed the following sentence in 0.4.2.5: “Relationships between controlled access points, as defined in FRAD, are also currently out of scope.” The Editor explained that there were three classes of relationships in FRAD: 1. Relationships between entities, e.g., between a person and a family (covered in RDA); 2. Relationships between the name and the person, e.g., between a name used in religion and a secular name (covered in RDA); 3. Relationships between controlled access points, e.g., parallel language/script forms. It was noted that the sentence at 0.4.2.5 could be misunderstood. The Editor said that he would look at FRAD to see if he could find a way to clarify the meaning. The JSC agreed that 0.4.2.5 would be split into two paragraphs.

**Action=Editor**

225.8.4 John Attig said that he had two questions regarding 0.4 in the General Introduction. Firstly, did the recent changes to FRBR need to be taken into account? The Editor said that he did not think that the changes would have any impact on RDA. John Attig said that his second question was to do with which version of FRAD would be cited in RDA. The Editor said that his understanding was that the final version of FRAD would probably not be available for the complete draft of RDA for constituency review, but would be available in time for the first release of RDA. He added that the reference would be changed when appropriate.

225.9 7. The addition of a statement regarding the conflict between some principles and objectives under 0.5.0.

225.9.1 The JSC agreed to add a sentence with the intent of this statement in 5JSC/RDA/Objectives and Principles/Rev: “It should be noted as well that while the statement of objectives and principles serves to provide overall guidance for the development of RDA, trade-offs sometimes have to be made between one principle and another.”

**Action=Editor**

225.10 8. Rewording of the text under “Representation” at 0.5.2.4.3 and under “Language preference” at 0.5.2.7.2 to reflect the instructions in RDA chapter 6, and resolution of the differences between RDA and the IME-ICC *Statement of International Cataloguing Principles*.

225.10.1 The JSC agreed to return to discussion of these principles after consideration of comments on chapter 6. The Editor noted that the instructions for music were very different to the general instructions. The Chair commented that the JSC could not leave the meeting without resolving the issue (see 5JSC/M/231.7-8).

225.11 9. Substitution of user tasks suggested by the LC rep for the user tasks listed at 0.5.1.1.1.

225.11.1 The Chair led a discussion of the table which had been prepared comparing the Mar 12, 2008 draft *International Cataloguing Principles*, FRBR/FRAD, RDA (0.5.1.1 and 0.1.2-0.1.3), and LC’s suggestions for 0.5.1.1.

225.11.2 LC suggestion: “Find -- a single entity (work, expression, manifestation, item, person, family, corporate body)”

After discussion, the JSC agreed to use the following wording at 0.5.1.1: “Find a specific resource or entity associated a resource that corresponds to the user’s stated search criteria.”

**Action=Editor**

- 225.11.3 LC suggestion: “Find -- all resources that embody a particular work, expression, manifestation, or item”

The JSC decided to retain the wording at 0.5.1.1: “*find* all resources that embody a particular work or a particular expression of that work”. It was noted that in most cases the resource is the manifestation. The Chair noted that the IME ICC Statement did not use “embody”.

**Action=Chair (IME ICC)**

- 225.11.4 LC suggestion: “Find -- all resources associated with a particular person, family, or corporate body”

The JSC agreed with the LC wording.

**Action=Editor**

- 225.11.5 IME ICC 3.1.2: “to **locate** sets of resources representing - all resources on a given subject”.

The JSC decided that this principle should be added to RDA, even though the subject entities are out of scope for the first release.

**Action=Editor**

- 225.11.6 IME ICC 3.1.2: “to **locate** sets of resources representing - -all resources defined by other criteria (such as language, country of publication, publication date, type of medium, type of content, type of carrier, etc.) usually as a secondary limiting of a search result.”

The Editor noted that in order to fully meet the principle many more RDA elements would need to be recorded in a controlled way, e.g., date of publication. He added that RDA had not been designed to satisfy every kind of search. The JSC decided not to add this principle to RDA.

- 225.11.7 IME ICC 3.2: “to **identify** a bibliographic resource or agent (that is, to confirm that the entity described in a record corresponds to the entity sought or to distinguish between two or more entities with similar characteristics)”

The JSC agreed that the text under “identify” at RDA 0.5.1.1 covered what was in IME ICC, and that no change was required.

- 225.11.8 IME ICC 3.3: “to **select** a bibliographic resource that is appropriate to the user’s needs (that is, to choose a resource that meets the user’s requirements with respect to medium, content, carrier, etc. or to reject a resource as being inappropriate to the user’s needs).”

It was noted that the text at 0.5.1.1 and the LC suggestion were the same. The JSC agreed that no change was required.

- 225.11.9 IME ICC 3.4: “to **acquire** or **obtain access** to an item described (that is, to provide information that will enable the user to acquire an item through purchase, loan, etc. or to access an item electronically through an online connection to a remote source); or to acquire or obtain an authority record or bibliographic record.”

The Chair noted that LC had suggested that the text at 0.5.1.1 be changed to “obtain the resource selected”. John Attig commented that formulations like “resource selected” had not been used elsewhere. The JSC decided to retain the text at 0.5.1.1: “*obtain* a resource (i.e., acquire a resource through purchase, loan, etc., or access a resource electronically through an online connection to a remote computer)”

The JSC decided not to add, “acquire or obtain an authority record or bibliographic record”, and to wait to see if this was added in FRBR/FRAD.

- 225.11.10 IME ICC 3.5: “to **navigate** within a catalogue and beyond (that is, through the logical arrangement of bibliographic information and presentation of clear ways to move about, including presentation of relationships among works, expressions, manifestations, and items)”

The Chair noted that there was no user task for “navigate” per se in FRBR, although it was mentioned at FRBR 6.2: ““navigate” the universe of entities represented in a bibliographic file or database. In a sense “relate” could be viewed as a fifth user task.” Hugh Taylor commented that navigation could be hidden and was part of “find”. The JSC discussed the issue and decided that “navigate” was covered by the following at 0.5.1.1 “*find* works, expressions, manifestations, and items that are related to those retrieved in response to the user’s search”.

- 225.11.11 RDA 0.5.1.1: “*clarify* the relationship between two or more entities; *clarify* the relationship between the entity described and a name by which that entity is known (e.g., a different language form of the name)”

The Chair said that FRAD used the term “contextualize”, and LC had suggested, “navigate”. The Editor noted that at Line 21 in the response table for sections 2-4, 9, ALA had suggested that “understand the relationship” be used instead. The JSC agreed, as this reflects the user’s perspective.

**Action=Editor**

- 225.11.12 RDA 0.5.1.1: “*understand* why a particular name or title, or form of name or title, has been chosen as the preferred name or title for the entity.”

The Chair said that LC had suggested that the final part of the principle be “has been chosen as the basis for a preferred access point”. The Editor noted that access points were a scenario 2 implementation. The JSC decided not to make the LC change.

John Attig noted that at Line 22 in the response table for sections 2-4, 9, ALA had suggested that it be specified that this requirement is important to cataloguers as opposed to users. The JSC decided to remove “or form of name or title”.

**Action=Editor**

- 225.12 10. The addition of text under 0.5.1.1 acknowledging ties to Panizzi, Cutter, Lubetzky, and the Paris Principles

- 225.12.1 John Attig said that he did not think that this would fit with the rest of the Introduction. Barbara Tillett said that she felt that it was important to acknowledge that RDA came out of a long tradition. The Chair said that she would draft some wording for JSC consideration.

**Action=Chair**

- 225.13 11. Rewording of the text on continuity at 0.5.1.4.1.
- 225.13.1 The JSC discussed the text at 0.5.1.4.1, in particular the use of “minimum”: “The data should be amenable to integration into existing databases (particularly those developed using AACR and related standards) with a minimum of retrospective adjustment to those databases.” The JSC agreed that this was still a true statement as an objective, but that there were times when it would conflict with other objectives. The JSC decided that the objective would read: “The data should be amenable to integration into existing databases, particularly those developed using AACR and related standards.”  
**Action=Editor**
- 225.14 12. Perceived overlaps between the objective of “responsiveness to user needs” at 0.5.1.1 and the principles of “differentiation” at 0.5.2.1 and “sufficiency” at 0.5.2.2.
- 225.14.1 The JSC agreed with the LC assertion in the wiki for the General Introduction that “Separate statements are needed because 0.5.1 is about objectives of the catalogue and 0.5.2 is principles.”
- 225.15 13. The addition of “in the language and script preferred by the agency creating the data” to the end of the text on “common usage” at 0.5.2.8.1.
- 225.15.1 The JSC decided to use the following wording: “Data describing the resource, other than those transcribed from the resource itself, should reflect common usage in the language and script preferred by the agency creating the data.”  
**Action=Editor**
- 225.16 14. Clarification of the intent of the statement on “common usage” at 0.5.2.8.3 and its relationship to instructions in chapter 6.
- 225.16.1 The Secretary said that the problem appeared to be with the use of “conventions”. The Editor noted that this was a replacement for “citation practices” which no one had liked. The JSC decided that no change to “conventions” was necessary (see 5JSC/M/231.8.1).
- 225.17 15. Retention/deletion of the list of appendices at 0.6.4.
- 225.17.1 The JSC decided to retain all of 0.6 and to evaluate the decision in the context of the online prototype.
- 225.17.2 The Chair noted that ACOC and ALA had suggested that the division be made clearer between the sections on recording attributes and the sections on recording relationships. The JSC agreed that this would be done as part of the layout at 0.6.3.  
**Action=Editor**
- 225.18 16. Deletion of appendix H.
- 225.18.1 The Chair noted that LC had asked whether the appendix was necessary. The JSC decided to retain the Appendix as cataloguers are used to seeing this information with the instructions.
- 225.19 17. The inclusion of text from the section on “Intended use” in the January draft under the section on “Structure” at 0.6.

225.19.1 The Editor suggested that a section such as this would be useful particularly if there was agreement with the revised structure proposed by ALA (see 5JSC/M/230.3).

225.20 18. Reworking of the section on “Required elements” to present requirements under a different structure.

225.20.1 The JSC agreed to cover this with the next agenda item.

225.21 Text on authority control

225.21.1 The Chair explained that at the request of the JSC (5JSC/M/180.11), the LC representative had prepared some draft text on authority control for inclusion in the General Introduction.

“Libraries have always found it valuable to organize resources for their users. They controlled the names, titles, and subject terms used to access data about those resources with controlled vocabularies in a process known as authority control. The resulting collocation of records under an authorized form of a name/title/subject term provided precision to searches, saving the user’s time. Authority control enabled library catalogs to meet the user task of “finding” information they wanted with precision and helped meet the “collocating” objectives for catalogs laid out in cataloging principles.

With card catalogs or book catalogs, catalogers followed standards to choose one form of the name/title/subject as the “authorized” heading (called “preferred access point” in RDA), and other “variant” forms of the name served as cross references. Cross references got the user to the right place in the linear catalog where the bibliographic records associated with that name/title/subject were collocated. In future online systems the cluster of variant names for an entity that are brought together in an authority record could be used to direct the user to the collocated information, and any of the variant names that best meet the users’ needs (e.g., preferred language/script) could be displayed.”

225.21.2 Margaret Stewart said that she had trouble seeing the draft text as part of the General Introduction, but she thought it would be useful in training. Hugh Taylor said that he was concerned about the language, the focus on libraries, and second-guessing about future systems. The Editor noted that there was no reference to authority control in RDA itself, and that it was covered in a number of different sections.

225.21.3 The JSC agreed that it would be useful to have a statement for cataloguers in the General Introduction about how to use RDA. It was noted that authority control was only one part of this. It was agreed that the content of the statement would depend on the outcomes of the decisions on structure. The Chair volunteered ACOC to work on this.

**Action=ACOC**

## 226 Required elements

226.1 Relationship to user tasks

226.1.1 The Editor said that he thought it was important to show the relationship between the objective of responsiveness to user needs and the required elements. He noted that in FRBR there was a link between the basic bibliographic record and the user tasks. He added that this had been reflected in the original 5JSC/ACOC rep/1 proposal, but this connection had been lost. The JSC discussed the Editor’s comments. The Chair noted that one difficulty was that multiple user tasks were supported by each element. Barbara Tillett

said that the basic record in FRBR is focussed on the needs of a national bibliographic agency, and that other objectives needed to be taken into account such as cost efficiency. John Attig commented that some people thought that any requirement was at the level of a library application profile.

- 226.1.2 The JSC agreed that there was a need to relate requirements to user tasks and that this should be done prior to release of the full draft. John Attig noted that ALA was looking for a general statement in RDA on the basis for why some elements are declared as required. The JSC agreed that a broad statement would be useful.

**Action=JSC**

## 226.2 Core elements

- 226.2.1 The JSC discussed the suggestion made by the Editor the previous day that there be a change to “core” elements instead of “required” elements. The Editor suggested that with the large number of elements in RDA, having a core set would make it more manageable. It was noted that this would represent a difference between requiring and recommending. The JSC agreed to label core elements, but that other elements would not be labelled as “optional”. It was acknowledged that the core elements are those used by libraries.

**Action=Editor**

- 226.2.2 The Editor said that conditions associated with required elements that were currently given in footnotes would be moved up under the “core” label for the element. John Attig commented that the issue of “if applicable” was less of an issue with the new terminology. The Chair said that it had been previously noted that those elements which were always to be included had instructions about how to supply them if not on the resource, e.g., the title proper.

## 226.3 Some elements that are required in ISBD and in FRBR and not in RDA

- 226.3.1 The Chair explained that IFLA’s ISBD Review Group and FRBR Review Group had sent the JSC a letter noting their concerns regarding some elements that are required in ISBD and in FRBR and not in RDA. The JSC discussed each of these in turn.

### 226.3.2 Statement of responsibility

The Chair said that LC had suggested that the statement of responsibility be “required” with the condition that it can be omitted if an access point is made for the entity in the statement. Barbara Tillett noted that the original push to make the statement of responsibility optional had come from managers at the Library of Congress.

The JSC members agreed with the IFLA Groups that the statement of responsibility following a title proper is important for identification and selection. The Chair noted that this would put the Library of Congress representative in a difficult position, as there was a strong imperative at that institution not to require the element. Barbara Tillett said that the change in perspective to designate it as a “core” element would be helpful.

**Action=Editor**

John Attig commented that in the consolidated ISBD, only the first statement of responsibility is mandatory. The Editor noted that this had not been mentioned in the letter from the IFLA Groups. He added that it would be possible to add an explanation to say that if there is more than one statement of responsibility only the first is considered part of the core.

The JSC discussed the statement of responsibility following an edition statement and following an additional edition statement and decided that they would not be core elements as they are not part of the basic level national bibliographic record in FRBR (FRBR 7.3).

It was noted that the statement of responsibility for a series had not been mentioned by the IFLA Groups.

#### 226.3.3 Additional edition statement

The JSC agreed with the IFLA Group's recommendation that the Additional edition statement be added to the set of core elements.

**Action=Editor**

#### 226.3.4 Place of publication

The JSC decided that the place of publication would not be added to the core elements, even though it is part of the basic level national bibliographic record in FRBR. The reasons are as follows: some other resource description communities have no need for this element (e.g., those dealing with online resources); it is meaningless in cases of simultaneous publication; and, it can lead to confusion in record matching.

226.3.5 The JSC agreed that the mandatory ISBD elements would be marked in Appendix D. Margaret Stewart noted that the ISBD Review Group had offered to review the Appendix. The JSC agreed to accept this offer. The Editor said that he had already revised the Appendix to match the Consolidated ISBD.

226.3.6 The Chair said that she would respond to the IFLA Groups.

**Action=Chair**

## 227 Style

227.1 Received and considered the following document:  
5JSC/Editor/Editor's Guide

227.2 The Chair led a discussion on the "Compilation of comments Style and wording" document distributed prior to the meeting. The document is organized by Editor's Guide section.

227.3 0. Purpose and scope

227.3.1 The JSC discussed the ACOC rep suggestion that the Editor's Guide be shared with the constituencies. The JSC agreed that after revisions to the Editor's Guide had been made it would be issued as a public document. The Editor suggested that it be mentioned in the cover letter for the complete draft.

**Action=Editor, Secretary (Cover letter for full draft)**

227.3.2 The Editor said that he would follow the Guide in preparing the complete draft for constituency review. It was agreed that constituency comments on style and wording should take account of the Guide, and only mention discrepancies and suggested changes.

227.4 1.2 Tables of contents



- 227.4.1 The Chair said that it was not clear whether unnumbered breakdowns will be visible in the table of contents in the online version. The JSC decided to return to the issue if necessary once Barbara Tillett had seen a demonstration of the online prototype. The Editor said he thought he remembered that Nannette Naught had said they would be included.
- 227.4.2 The Editor said that in answer to the LC question on expansion of tables of contents, his understanding was that you would be able to drill-down to D-level subheads. He noted that in the online product there would no longer be separate tables of contents as found in print drafts, there would only be what was in the sidebar.
- 227.5 1.4 Requirement labels
- 227.5.1 Barbara Tillett explained that LC was suggesting that there be colour coding or other visual signal to identify instructions for core elements in the online product. John Attig said that he saw this as a feature of the online product. The Editor noted that the co-publishers had hired a graphic designer, who would look at design, colour, and layout.
- 227.5.2 The Editor said that in response to the second LC comment, as explained previously (5JSC/M/226.2.2) footnotes for required elements would now be included in the text.
- 227.6 1.5 Paragraphs
- 227.6.1 The Editor noted in response to the LC suggestions regarding presentation of exceptions that this would depend on the online product and was out of his control. He added that he had been told that it would not be possible to use bullets to introduce paragraphs in the online product.
- 227.6.2 The Editor said that although the ACOC rep had found some inconsistency in when a new paragraph is begun, in the latest drafts he had split instructions with more than one sentence into separate paragraphs. The JSC agreed that something to this effect should be included in the Guide. The Editor said that he would do this, but add a proviso to account for when there are examples that belonged with all instructions.  
**Action=Editor**
- 227.7 1.9 Footnotes
- 227.7.1 The Chair said that in response to the ALA comment, she thought that there would be no footnotes in the online product. The Editor said that they would display as if they were part of the text. He said that in addition he would move as many footnotes as possible up into the text. The Chair confirmed that everyone agreed that the use of footnotes should be minimized.  
**Action=Editor**
- 227.8 2.3 Paragraph numbers
- 227.8.1 The Chair said that the lack of paragraph numbers in the online product was outside JSC control and would be raised in connection with the product.  
**Action=Chair**
- 227.9 4.3 Examples
- 227.9.1 The Chair noted that the LC rep had asked “Should there be an instruction about indicating if ISBD punctuation is being used in the example or in the explanation?”. The Editor

noted that in the General Introduction it said that in cases where there is more than one element, ISBD punctuation would be used. The Chair said that 4.3 already had the text “In examples that show two or more elements separated by ISBD prescribed punctuation, follow the instructions in RDA appendix D.” JSC decided to also refer to the explanatory text in this sentence.

**Action=Editor**

227.10 6. Abbreviations

227.10.1 The JSC decided not to follow the LC rep suggestion to use italics when an acronym or initialism is used to refer to a complete standard or document. The Editor said that in most cases it was the model that was being referred to (e.g., FRBR) and not the publication.

227.11 7. Sentence structure, phrasing, and word usage

227.11.1 The JSC agreed with the ACOC rep suggestion that a general guideline to avoid sentence lengths over 25 words be added to the Guide. The Editor noted that the sentences were often long because of all of the specific conditions that he had been asked to include.

**Action=Editor**

227.11.2 The Chair noted that the LC rep had suggested that the object of a verb be moved closer to a verb in long sentences. Judy Kuhagen explained that it was the difference between what was currently at 9.2.10.1.5 “Record a form using the surname as the first element as a variant name ...” and what LC had suggested, “Record as a variant name a form using the surname as the first element ...” The Editor said that he agreed and that this was covered by the example he had under “instructions” at 7.1 “Transcribe an edition statement as it appears ...” he said that he would make sure that the style was consistently applied.

**Action=Editor**

227.12 7.2 Restrictive phrases and clauses

227.12.1 The Chair referred to the guideline “If an instruction applies to a specific type of description, etc., begin the instruction with a conditional clause using “When ...”, and said that she had suggested that the phrase not be repeated at each subsequent instruction. The Editor said that he was following the *Chicago Manual of Style* instruction to always repeat the subhead. He added that in the online product you could not guarantee that people had seen earlier instructions. The Chair said that she would accept this.

227.13 7.4 Terminology – Terms defined in Glossary

227.13.1 Barbara Tillett said that she was concerned that the definitions of terms changed between chapters. The Editor explained that the Glossary covered the full breadth of usage in RDA, but the explanations of key terms in the sections outlined specifically how they were used in that section. The JSC discussed the issue and decided that the specific definitions would help to orientate users of RDA to the section, particularly in the print product. The JSC asked the Editor to make it clear in these cases that the definition has been tailored, and include the limited focus in the lead in to the definition.

**Action=Editor**

227.13.2 John Attig said that ALA had suggested that a standard glossary style be used for defining terms. The Editor explained that definitions in scope statements were not formatted like Glossary entries, e.g., they began with an indefinite article. John Attig said that ALA did not think this was necessary, but also did not feel strongly that it needed to be changed.

## 227.14 7.5 Singular/plural

## 227.14.1 Subheads

The Chair noted that ALA had said that there should be consistency in using the singular form for element names throughout RDA. The Editor explained that element names were in the singular, but the plural form was used in subheads beginning with “Basic instructions on recording ...”. He added that this was because elements can be repeated. He noted that the Editor’s Guide had been compiled after the release of the December 2007 draft. John Attig said that he was satisfied with the explanation.

## 227.14.2 Nouns in both singular and plural form

The Chair noted that ALA had also disagreed with this statement in the Guide “Do not use “(s)”, etc., to indicate that either the singular or the plural of a noun may be applicable. Use both the singular and plural forms of the noun in full, or use a phrase such as “one or more ...”” The Editor said that he had made this change as the result of an ACOC comment. He added that although it was not mentioned in the *Chicago Manual of Style*, other style guides said to avoid using constructions such as “year(s)”. John Attig withdrew the comment.

The Chair said that there was an ACOC rep suggestion to use either the plural or the singular term consistently when the distinction is not important. The Editor said that he was not sure how the Guide could be written to accommodate this. The Chair said that she would not pursue the issue.

## 227.14.3 “Data”

The JSC discussed the guideline to use “data” as a plural noun, but there was no consensus to change it.

## 227.14.4 Other plural comments

The Chair noted that ALA comment that for consistency “changes of name” should be used instead of “change of name”. The Editor said that it should be “change of name” as only one change is required for the instruction to apply. The JSC asked the Editor to ensure that usage is consistent.

**Action=Editor**

## 227.15 7.7 Recurring phrases

227.15.1 The Chair said that LC would prefer that “... following the general guidelines on ...” be used instead of “... in accordance with the general guidelines on ...”. The Editor suggested that instead, there could be a new sentence beginning with “Follow the general guidelines ...”. The JSC agreed (see 5JSC/M/227.15.8).

**Action=Editor**

227.15.2 The JSC agreed with the LC suggestion that “annotation” be changed to “note” in element names. The Chair said that LC had also queried the relationship of annotations to “details on”. The Editor explained that “details on” were more information within the element, e.g., by using a controlled list, while notes were a separate element.

**Action=Editor**

- 227.15.3 The JSC discussed the LC suggestion that when a phrase such as “person, family, or corporate body” has been given in one instruction in a section, to use the shorter form “person, etc.” in subsequent instructions in that section. The Editor noted that he had previously been instructed to restrict usage of “etc.”. The JSC decided not to make the change.
- 227.15.4 The Chair noted that both LC and ALA had suggested that “for” be used instead of “representing” in phrases such as “preferred access point representing the work”. The Editor said that “for” was ambiguous as an access point for the work could be a person associated with the work. The Chair said that she thought that people would become used to the “representing” construction. It was noted that with the online tool it would be possible for instructions to be read in isolation. The JSC decided not to make the change.
- 227.15.5 The Chair said that it had been suggested that “embodied in” be changed to “contained in”. John Attig said that “embodied” has a technical meaning in the FRBR model which he thought people needed to learn and understand. The JSC decided not to make the change.
- 227.15.6 The JSC discussed the ACOC rep suggestion to replace “make additions to” with “add to”. The Editor pointed out that the instruction captions contained “additions”. The JSC decided not to make the change.
- 227.15.7 The JSC agreed with the ACOC rep suggestion to harmonize instructions that say “identical or similar to” and those that say “the same or similar to”.  
**Action=Editor**
- 227.15.8 The Chair noted that it had been suggested that either “apply” or “follow” be used in instructions. The JSC decided to use “Apply”.  
**Action=Editor**
- 227.15.9 The JSC discussed the ACOC rep suggestion that the phrase “pertaining to” be replaced by various alternatives. The JSC decided not to make the change, as the Editor would need to spend considerable time making sure the meaning of the instruction had not changed.
- 227.15.10 The JSC agreed with the ACOC rep suggestion not to repeat “describing” in the instructions, as the whole context of RDA is description, e.g., change “When describing a serial that has ceased publication ...” to “When a serial has ceased publication ...” The Editor noted that in this case the sentence would begin with “If”.  
**Action=Editor**
- 227.15.11 John Attig noted that ALA had suggested that “identify” be used only for the user task. The Editor said that he would need to see specific examples, as he thought this was the way the term had been used.
- 227.15.12 The JSC decided to discuss the next ALA suggestion, that either “forename” and “surname”, or “given name” and “family name” be used consistently, when examples are found (see also Line 491 in the response table for the December 2007 draft). (Note: not discussed at the meeting.)
- 227.15.13 John Attig noted that the next ALA comment was that “General” is used in at least two separate ways: basic instructions as opposed to specific instructions; and, applicable to a wide variety of resources. The Editor explained that general guidelines differed from basic instructions, which are at the element level. John Attig said that the issue was with

the use of “general” in specific instructions. The Chair suggested that the Editor look to see if any changes were required.

**Action=Editor**

227.15.14 The JSC discussed the ALA recommendation to remove the word “general” from the phrase “... following the general guidelines and instructions given under 6.1.1 ...”. John Attig said that he now had a better understanding of the distinction between guidelines and instructions.

227.15.15 The Chair said that ALA had noted that sometimes the phrase “construct the preferred access point representing the work ...” is used (i.e., 6.23.1.15.1, 6.23.1.22.1, etc.); in other instructions the phrase “construct the preferred access point by ...” is used (i.e., 6.23.1.21a.1, 6.23.1.29a.1, etc.). The JSC asked the Editor to make the wording consistent.

**Action=Editor**

227.15.16 The JSC agreed with ALA that the following would be used: “the form of name chosen [not “recorded”] as the preferred name”.

**Action=Editor**

227.15.17 The JSC agreed with ALA that there should be something in the editorial guidelines about when “corporate” may be omitted when referring to a corporate body. The Editor explained that the first instruction under a sub-heading would use the full term.

**Action=Editor**

227.16 12 Metadata

227.16.1 The JSC decided to defer discussion of this section of the Editor’s Guide until all JSC members had seen the prototype for the online product. (Note: metadata requirements were discussed after the meeting.)

**Action=JSC**

227.17 Possible additions to the Editor’s Guide

227.17.1 John Attig noted that ALA had suggested that types of information that are given at most data elements, be given in briefer more tabular format, e.g., delete 5.8.0.2.1 and change 5.8.0.2 to “source of information: any”. The Editor noted that in a number of cases the source of information instruction was very complex. He added that he had been told that in terms of the online product, spacing in tables could not be controlled when designing for all Web browsers. The Chair confirmed with John Attig that this answered the comment.

227.17.2 John Attig said that ALA had found a case at 5.10.0.3 where the caption just said “General guidelines” instead of beginning with “Recording ...”. The Editor said he would fix this.

**Action=Editor**

227.17.3 The JSC agreed with the ACOC rep suggestion that a section be added to the Editor’s Guide to cover when examples are given in parenthesis as part of the instruction, and when they are given as separate examples. It was agreed that the number of parenthetical examples would be limited to three.

**Action=Editor**

227.17.4 The Chair noted that LC had asked whether there would be an option to suppress examples in the online RDA. The Editor said that it would be possible to do this by limiting the view parameters, or to turn off view of all examples. The Chair suggested that the JSC wait to see how the specifications for the online product had been delivered.

227.17.5 The Chair said that ALA had suggested that in the explanations that follow the examples “Name usage” be used instead of “Name”, e.g., at 11.2.10.1.2. The JSC discussed using “Name on resource” and “Name on source”, and in the end decided that no change would be made.

227.17.6 The JSC discussed the following comment from the LC rep: “LC has noted in its comments on various drafts that some references lead to instructions consisting only of references to other instructions. Can the reference be changed to point to the last stop instead of going through intermediary stops?” The JSC decided that the context provided by the intermediary reference was useful.

227.17.7 The JSC agreed with the ALA comment that when making references, there are cases in which it would be helpful to include the section title of the instruction being referred to, in order to alert the user what sort of information lies at the end of the link. The Editor noted that this would make instructions longer. The Chair confirmed that there was agreement that providing the explanation was more important (e.g., at 6.23.1.17.1).

**Action=Editor**

227.18 Cover letter for the Editor’s Guide

227.18.1 1 Formatting

The Editor said that he did not intend to discuss the comments on formatting in the cover letter as in terms of the online product this was out of his control.

227.18.2 2.2 Subhead numbers

The Editor said that the questions in the cover letter regarding exceptions in the numbering of subheads were really for Nanette Naught to answer.

**Action=Editor**

227.18.3 3.1 Chapter titles

The Editor explained that in the MS Word drafts of RDA, chapter titles were input using sentence style capitalization, but that in the online product they would be displayed in headline style. The JSC confirmed that the Editor did not need to change his practice, and agreed to assess what had been done in the online product later.

227.18.4 7.4 Terminology

The Editor noted that the Editor’s Guide said that “full stop” (as in AACR2) would be used rather than “period”, and asked if this was acceptable. The JSC agreed.

227.18.5 8 Citations

The Editor explained that for citations, he was following the *Chicago Manual of Style* rather than the style used in AACR2. The JSC agreed.

## 227.18.6 9.3 Emphasis - Bold italic

The Editor noted that there was no longer “bold italic” font used in the middle of a sentence and that these had become run-in subheads.

## 227.18.7 11 Cross-references Numbering

The Editor noted that cross-references would only go to the level of C-level subheads.

**228 Proposed revision of RDA chap. 6, Additional instructions for musical works and expressions**

228.1 Received and considered the following documents:

5JSC/LC/12  
 5JSC/LC/12/ALA response  
 5JSC/LC/12/BL response  
 5JSC/LC/12/CILIP response  
 5JSC/LC/12/CCC response  
 5JSC/LC/12/ACOC response  
 5JSC/LC/12/ALA response/ALA follow-up

228.2 John Attig said that he wanted to discuss 5JSC/LC/12. He said that there would be limits to how well he could present the ALA position as he did not have a music background. The JSC acknowledged that additional expertise from within the constituencies would be required to assist in making decisions on the proposal. It was agreed to work out the best way to proceed, and scheduling for this, later in the meeting.

**Action=JSC**

**229 JSC meetings policy document**

229.1 Received and considered the following document:

5JSC/Policy/6/Rev

229.2 As there was not sufficient time remaining in the day to start discussion on a substantive agenda item, it was decided to complete an outstanding agenda item from the first executive session, the JSC meetings policy document.

229.3 The JSC agreed to the following changes:

- Hotel requirements: Include capacity for the RDA Editor and Project Manager.
- Meeting room: Add requirements for office supplies (e.g., paper clips, stapler). Add requirements for electrical outlets for computers, internet connectivity, and capacity for data projection. It was noted that the later would become important once the text of RDA moved to the authoring system and as RDA online was developed.
- Notes for meeting hosts: Change number of copies of AACR2 required from 8 to 1.
- Meeting expenses: Remove the requirement for copies of expense forms to be sent to the Chair.
- Transport: Change “national government’s travel policy” to “employer’s travel policy”.
- Meals: Change statement to refer to meals in connection with the meeting.

- 229.4 The Chair said that she would prepare a revised version of the document for approval by the CoP.

**Action=Chair**

## 230 RDA Sections 2-4, 9 – Constituency Review of December 2007 Draft - General issues

- 230.1 Received and considered the following documents:

5JSC/RDA/Sections 2-4, 9

5JSC/RDA/Sections 2-4, 9/LC response

5JSC/RDA/Sections 2-4, 9/Chair follow-up/1

5JSC/RDA/Sections 2-4, 9/BL response

5JSC/RDA/Sections 2-4, 9/Chair follow-up/2

5JSC/RDA/Sections 2-4, 9/CCC response

5JSC/RDA/Sections 2-4, 9/CILIP response

5JSC/RDA/Sections 2-4, 9/Chair follow-up/3

5JSC/RDA/Sections 2-4, 9/ACOC response

5JSC/RDA/Sections 2-4, 9/Chair follow-up/4

5JSC/RDA/Sections 2-4, 9/ALA response

5JSC/RDA/Sections 2-4, 9/ALA response/ALA follow-up

- 230.2 The Chair led a discussion on the topics listed in the document “General comments on draft of Sections 2-4, 9 Discussion Guide”.

- 230.3 Overall structure

The Chair said that ALA, ACOC, and CILIP had all made comments on this topic. She noted that a number of questions had been posed in the discussion guide:

- 230.3.1 Should we make the division between recording attributes and relationships more explicit?

The JSC decided that this division would be made clear in the Prospectus and in the table of contents.

**Action=Editor**

- 230.3.2 Should the structure reflect a more theoretical orientation of work/expression/manifestation/item or be more practical/cataloguing workflow orientated and start from the manifestation/item? and, Does the organisation proposed by ALA have benefits, and if so, is it practical to make the proposed changes?

The Chair commented that the organization proposed by ALA was more theoretical than the existing organization which was more orientated to a cataloguing workflow. John Attig explained that ALA thought that all of the sections dealing with the FRBR entities and their attributes should be organized in the same way.

The Editor explained the rationale behind the existing organization of RDA. FRBR is different from other conceptual models in that it relates entities, attributes and relationships to user tasks. Without this, all that you have is a data dictionary with everything of equal value. FRBR says that you make choices based on the user tasks you are trying to support. The first few chapters of RDA are based around the question “what do I want to do?”. The first task is to provide attributes to identify the manifestation, and essentially this is what you are doing in a minimum level record (80% of the core elements are in chapter 2). The second task is to provide attributes that will help people to make a selection on the basis of physical format and technical details and content (old



chapters 3 and 4). The third task is "obtain". As you move through RDA the record becomes richer and richer (e.g., providing relationships is a way to enrich records).

The JSC discussed the issue and there was agreement that the organization proposed by ALA would mean a heavier reliance on workflows in RDA online. The Chair said that she would seek a firm answer from the co-publishers on the provision of a print product.

**Action=Chair**

The Chair asked for the reaction of all of the JSC members to the proposed ALA structure. John Attig said that ALA perceived it as a refinement of the existing structure, and would still be satisfied without it. Barbara Tillett and Margaret Stewart said that they preferred the existing structure. Hugh Taylor said that he thought that any new organization would have to be manifestly superior to what had been agreed at the October 2007 meeting, and agreed to by everyone. He added that he did not think that the current structure was so wrong, or the proposed structure was so right, that the risk of changing would be worth it. Alan Danskin said that he found the existing organization easy to explain. He noted that you started with the concrete and then moved on to elements that were more expensive to produce. The Chair said that most members of ACOC would like a work-expression-manifestation-item arrangement, but that others would not like the resulting length of the manifestation chapter.

The JSC decided to retain the current organization of RDA. The JSC agreed to include the rationale for the organization in the General Introduction.

**Action=Editor**

230.3.3 Should we refer to user tasks in chapter titles, etc?

The Chair noted that ACOC questioned the usefulness of referring to the user tasks in the names of individual chapters (e.g., Identifying persons) because so many elements support multiple user tasks. The Editor explained that chapters referred to the primary task that the attributes within it support. He noted that chapter titles were in effect the job the cataloguer is doing. The JSC decided not to change the chapter titles.

230.4 Database implementation scenarios

230.4.1 How can we write the instructions to cater for all three scenarios?

The Chair said that ACOC had noted that there were difficulties in writing RDA to cover both *Scenario 1: Relational / object-oriented database structure* and *Scenario 2: Linked bibliographic and authority records*. The Editor said that he had tried to be as neutral as possible, but that the main issue was to do with the function of access points in each of the scenarios. He noted that in scenario 1 access points were not required in terms of data storage, but would be required in terms of displaying relationships. He said that an advantage of scenario 1 was that you could decide which elements to display.

230.4.2 How can we assist the transition to scenario 1?

Barbara Tillett noted that there needed to be discussion with vendors, otherwise there would be no systems that used scenario 1.

The Chair said that ACOC was concerned about how people would be orientated to the scenarios themselves. She also noted the CILIP comment: "The FRBR entities and user tasks are now clearly explained. We think some visual apparatus, however, such as is

found in other documents (along the lines of those in *RDA Database Implementation Scenarios*) would greatly assist understanding.” The Project Manager said that she would highlight the implementation scenarios to the ALCTS RDA Implementation Task Force.

**Action=Project Manager**

The Editor suggested that in terms of the online product, the workflows and generic landing pages based on appendices D and E would assist people in orientating to RDA. He added that you could overlay ISBD or MARC on RDA.

## 230.5 FRBR/FRAD

### 230.5.1 How do we address change in treatment of entities, attributes, and relationships in the models on which RDA is based?

The Chair noted that this issue had been raised by both ACOC and ALA. She added that one example was the change from a name being an attribute of an entity to being a relationship of that entity. She said that ACOC thought that discrepancies should be noted and that reverse mappings would be helpful in explaining RDA to those familiar with FRBR/FRAD. In the following discussion the Chair ascertained that ACOC was the only constituency to have raised this concern.

John Attig said that ALA had noted some cases in which RDA had an element, but FRBR/FRAD had a relationship. The Editor explained that there were some cases in FRBR where a relationship could have been recorded but had not been included in the model, e.g., for place of publication. He added that in RDA the place which is recorded is the transcription of the label on the manifestation, and not a normalized form. John Attig suggested that the problems that some people had were actually with the models themselves and needed to be dealt with there first.

## 230.6 Elements and Access Points

### 230.6.1 How can we ensure that these instructions are clear and explicit about when elements are used or required?

The Chair noted that LC had outlined an explanation in their response. She noted that decisions had been made the previous day about required elements and footnotes (5JSC/M/226.2.2)

The Editor explained that certain elements are required to differentiate entities. He added that in scenario 2 these would be included in the access point, but that they are still needed in the record in scenario 1. He noted that differentiation was key to identification. The Chair noted that independent of display (which could be just an identifier), there still needed to be a cluster of data elements to uniquely identify the entity. The Editor said that in the statements about when an element is required, he would no longer refer to access points, but to differentiation.

**Action=Editor**

### 230.6.2 How can we ensure that these instructions are clear and explicit about when access points are needed?

The JSC discussed the ALA suggestion that instructions on constructing access points be moved to the end of the relevant chapters. Margaret Stewart noted that CCC had made

similar comments. The JSC decided that moving the instructions would help with the understanding of the scenarios.

**Action=Editor**

230.7 Required/Optional labels

230.7.1 The Chair noted that these issues had been resolved the previous day (5JSC/M/226.2).

230.8 Language and Script

230.8.1 Margaret Stewart said that CCC thought that there was some inconsistency between what was in the General Introduction and what was in the chapters.

230.8.2 The JSC discussed the following phrase in 9.5.0.7.3 “or its equivalent in the language preferred by the agency creating the data”. Hugh Taylor said that he thought that it was tautological because there was already an instruction in the General Introduction (0.11.1.3) which allowed substitution of terms to reflect the language and script preferences of the agency. The Editor said that he would remove any instances of the phrase, or similar phrases.

**Action=Editor**

230.8.3 Margaret Stewart noted that 6.18.1 referred to the “accepted form of name in the language preferred by the agency creating the data” but that not all of the examples were in English. John Attig added that 6.18.2-3 specified English language forms (Line 326 in December 2007 draft table). The Editor explained that agencies would have to decide which language they preferred for each element, it could be the language of users. John Attig noted that because of what was in the General Introduction, the result of applying all three instructions would be the same.

230.8.4 Adam Schiff asked if it needed to be clarified that even though not all of the examples are in English, it is an English language catalogue (e.g., “Divertimenti”). The Editor said that it would be made clear in the General Introduction that all examples are in an English language environment.

**Action=Editor**

230.8.5 Margaret Stewart asked about the first CCC comment “CCC would like clarification of the scope of the “language preferred by the agency creating the data”. Is it the language of the catalogue, or just any language, or both depending on the situation?”. The Editor said that there could be multiple answers, and would depend on the interpretation.

230.9 Definitions

230.9.1 The Chair noted that this had been covered the previous day (5JSC/M/227.13).

230.10 Redundancy of general and specific guidelines

230.10.1 John Attig said that this was an issue which had always frustrated ALA, particularly in relation to chapter 3. He asked why there had to be both general and specific guidelines. The Editor noted that it said in the objectives and principles document that every element would have a substantive general instruction. He noted that a criticism of AACR2 was that it went straight to specifics, which meant that if you had a situation which was not covered there was nothing to refer to. The Chair confirmed with the JSC that they agreed in

principle with providing a general instruction. The JSC agreed to discuss the issue in relation to chapter 3 later in the meeting (see 5JSC/M/255.17).

#### 230.11 Punctuation/Appendix E

230.11.1 The Chair noted that the JSC now had before them a draft of Appendix E, which had not been available during the review period.

230.11.2 The Editor said that because he had not had a standard like ISBD to use, he had based the punctuation in Appendix E on AACR2. He noted that punctuation that is internal to an element is included with the instructions on the element because it needed to be recorded (e.g., the comma separating a surname from a forename). The JSC asked the Editor to make this clear in the General Introduction and Appendices D and E.

**Action=Editor**

#### 230.12 Examples

230.12.1 Hugh Taylor said that the CILIP view was the examples had been prepared in the context of text on paper, and that this approach was inappropriate in an online product. He said that in some cases it was difficult to understand the example because the context was missing. The JSC agreed to discuss with the co-publishers the ability to link from individual examples to complete examples and source material.

**Action=Chair**

230.12.2 The JSC discussed the complete examples to be issued with the full draft of RDA. The Chair noted that the complete examples (like all examples) were intended to address the most common situations that will be encountered, and assist in understanding the draft. The JSC agreed that the starting point for the complete examples would be a scenario 2 implementation and that each would be given as both labelled elements (with core elements marked) and encoded in MARC 21. The JSC asked Examples Group 1 to prepare complete examples for 8-10 manifestations. The JSC asked Examples Group 2 to create complete examples for three persons, two families, four corporate bodies, and a small number of works and expressions. The JSC asked the Groups to work together on one set of examples, with Examples Group 2 providing “authority records” for one of the “bibliographic records”. It was agreed that ideally there would also be an illustration of a scenario 1 implementation.

**Action=Examples Groups 1 and 2**

#### 230.13 Elements vs. element sub-types

230.13.1 John Attig said that to be consistent with chapter 2, ALA had suggested that in Chapter 6, Preferred title and Variant title be given as sub-types under Title of work, etc.; and in Chapters 9-11: Preferred name and Variant name be given as sub-types under Name of person, etc. The JSC agreed that this would be desirable, and asked the Editor to prepare a “mock-up” to identify any problems with this structure.

**Action=Editor**

**231 RDA Section 2 (chapters 5-6): Recording attributes of work and expression**

- 231.1 Received and considered the following document:  
5JSC/LC rep/2
- 231.2 The Chair noted that a response table had been prepared for the December 2007 draft of Sections 2-4, and 9. She suggested that discussion begin with the document circulated by LC at the meeting (5JSC/LC rep/2 – RDA draft chapter 6: selected topics on naming the work)
- 231.3 5JSC/LC rep/2: 1. Originating bodies
- 231.3.1 Barbara Tillett explained that LC had presented two choices for dealing with originating bodies. The first choice was to include in RDA the AACR2 21.1B2 concept of emanating bodies. The second choice was to depart from AACR2 and name the work based on the role of the entity involved, and not the type of resource.
- 231.3.2 The JSC discussed the issue and although there was some support for the second choice, there were concerns regarding the change to current practice, i.e., that many more works would be named by corporate body plus preferred title. It was noted that in terms of serials there was a harmonization issue with the ISBD and ISSN communities.
- 231.3.3 The JSC decided to eliminate “originating body” as a role from chapter 19, and build 21.1B2 into the definition of “creator”.  
**Action=Editor**
- 231.4 5JSC/LC rep/2: 2. Collaborative works: “principal responsibility”
- 231.4.1 Barbara Tillett said that LC thought that concept of “principal responsibility” should be reinstated. The Chair noted that the simplification to choose the first named person, etc. was introduced at the instigation of LC. Barbara Tillett replied that LC had tested this and found that there were undesirable consequences. She added that LC thought it was important to be truthful about who was doing the creating. John Attig and Margaret Stewart noted that their constituencies had made similar comments in their responses to the December 2007 draft (Lines 121 and 124 in response table). The JSC agreed to reinstate the concept of principal responsibility.  
**Action=Editor**
- 231.5 5JSC/LC rep/2: 3. Different identities for the same work
- 231.5.1 Barbara Tillett explained that LC was suggesting that wording drawn from AACR2 22.2B3 be added to chapter 6. She added that this would assist when different identities for the person were used on separate manifestations of the same work. The JSC agreed that the problem needed to be addressed, and asked the Editor to make suggestions after the meeting as to the best place for the instruction.  
**Action=Editor**
- 231.6 The Chair led a discussion of the line numbers in the December 2007 draft response table that were highlighted for priority discussion.
- 231.7 5.2.4 – Representation

- 231.7.1 Line 23: 5.2.4: Include priorities for sources of preferred names and titles. Discuss inclusion of concept of "original title" (ALA)

John Attig explained that the issue was one of compatibility with the IME ICC *Statement*. Barbara Tillett noted that 6.3.4.1 in the *Statement* contained the following order of preference: “the title most frequently found in manifestations of the work in its original language, the title as found in reference sources, or the title most frequently found on manifestations.” The Editor asked how this intersected with IME ICC 6.2 “When names have been expressed in several languages, preference should be given to a heading based on information found on manifestations of the expression in the original language and script; but if the original language and script is one not normally used in the catalogue, the heading may be based on forms found on manifestations or in reference sources in one of the languages and scripts best suited to the users of the catalogue.” He added that the “but if” was the issue. The Chair noted that because RDA was based on AACR2, there were different priorities for the source of the preferred title based on the context (e.g., before or after 1501). Barbara Tillett said that she thought that 5.2.4 was simply stating a general principle. The JSC agreed to revise 5.2.4 (0.5.2.4.3 in the General Introduction) to parallel IME ICC 6.3.4.1. It was noted that works created prior to 1501, music, etc. would be exceptions. The JSC agreed to point out the anomaly with 6.2 to IME ICC.

**Action=Editor; Chair (IME ICC)**

- 231.8 5.2.5 - Language preference

- 231.8.1 Line 26: 5.2.5 and 5.2.6: Resolve inconsistency between application of these two principles (ALA)

The JSC decided to delete 5.2.5 (0.5.2.7.2 in the General Introduction) as it is not consistent with 5.2.4 (it was noted that these issues were raised in 5JSC/CILIP rep/1). The Editor noted that 5.2.6 (Common practice) had originally dealt with common citation practice, to cover the special instructions for legal works, etc. The JSC also decided to delete 5.2.6 (0.5.2.8.3 in the General Introduction) as it is not a general principle, and instructions for legal works, etc. are treated separately. The JSC asked the Secretary to note for the cover letter for the full draft that some instructions go against the principles.

**Action=Editor; Secretary (Cover letter for full draft)**

- 231.9 5.3 Required elements

- 231.9.1 Line 30: Relationship to Functional objectives and principles: Acknowledge that elements are required in order to meet functional objectives and principles. Address role of preferred access points (ACOC)

The Chair noted that the need to acknowledge the relationship to the functional objectives and principles had already been agreed (5JSC/M/226.1). She added that the role of preferred access points had also been discussed (5JSC/M/230.6).

- 231.9.2 Line 31: Request discussion as to whether preferred access points are necessary in scenario 1 (ACOC)

The Chair noted that this had already been discussed (5JSC/M/230.6).

- 231.9.3 Line 32: It is confusing to combine instructions for required elements for works and expressions (ACOC). Strongly recommend that separate lists be given for works and expressions. See suggestions [at 5.3.1] (ALA)

The JSC agreed to list the core elements for works and expressions separately.

**Action=Editor**

- 231.9.4 Line 35: 5.3.1 FRBR/FRAD: ACOC notes that both Title and Identifier were treated as attributes of the work in FRBR, but are no longer treated as such in FRAD. Instead they are treated as separate entities with relationships to the work (expression etc.) entity. ACOC would appreciate discussion of how RDA can deal with this difference. (ACOC)

The Chair noted that this had already been discussed (5JSC/M/230.5).

- 231.9.5 Line 27: 5.3.1 Title: make it clear that the preferred access point representing the work is required (ACOC); 5.3: LC recommends (1) replacing the “title” listing with “preferred access point for the work” and “preferred access point for the expression,” and (2) deleting the footnote. (LC)

The Editor noted that based on an earlier discussion he would be neutralising the lists so that they did not refer to preferred access points. The Chair commented that the ACOC and LC comments related only to a scenario 2 implementation.

Barbara Tillett said that the footnote 1 at 5.3.1 was not accurate as in some cases the preferred title is not preceded by the preferred access point for a person, etc. The Editor said that he would reword the footnote to make it clear that the preferred title can stand alone.

**Action=Editor**

- 231.9.6 Line 28: 5.3.1 Identifier: Make it clear that required if applicable (ACOC)

The Chair noted that in some cases there would not be an identifier. The Editor replied that the first line of 5.3.1 did say “that are applicable”.

- 231.9.7 Line 39: 5.3.2 and 5.3.3: ALA urges that the elements be listed as required for describing the entity; that a separate sub-instruction be devoted to the construction of access points based on the preferred name or title of the entity; that a further sub-instruction be devoted to the construction of a unique access point, if desired, by adding other elements to the preferred name; that the preferred name be listed as a required element for each entity, but that the potential additions used to differentiate identical names not be listed (or labeled) as required. (ALA)

John Attig said that he thought the ALA comments had been covered by earlier discussion.

- 231.9.8 Line 40: 5.3.2 ACOC notes that the instruction at 6.7 is applied only to distinguish between works with the same title, form, date, and place of origin, but this is not clear from the wording given in this instruction. (ACOC)

The Chair noted that the instruction at 5.3.2 did not match that at 6.1.1.7 (Additions to access points representing works). The JSC asked the Editor to change 6.1.1.7 to make it clear that one or more of the additions can be used “as appropriate”.

**Action=Editor**

- 231.9.9 Line 43: 5.3.4 The use of ‘more fully’ and ‘as a minimum’ is confusing. The attributes listed under 5.3.4 should be treated as required (or not) as applicable. (ACOC); Unclear what “describing the work or expression more fully” means. (ALA)

The Editor said that this wording had already been changed in the listing of required elements in the General introduction and that he would make the same change in chapter 5.

**Action=Editor**

231.10 5.6 Preferred access points representing works and expressions

231.10.1 Line 70: ACOC found it confusing to combine the instructions for preferred access points for works and expressions in one set of instructions. (ACOC)

The Chair noted that this had been resolved in terms of the required elements, but not in terms of the elements themselves. The Editor noted that there was a split between elements for works and expressions in chapter 6. The JSC agreed that no change was necessary.

231.11 5.7 Variant access points representing works and expressions

231.11.1 Line 75: ACOC notes that 5.7 lacks an instruction on creating a variant access point for the expression, similar to that in 5.6.5. If variants are only tracked at the level of the work, this should be made explicit. (ACOC)

The JSC discussed the issue and agreed to add a new instruction at 6.1.4.4 to cover variant access points for expressions (which will be based on the preferred access point for the work). A new instruction at 5.7.6 will refer to this (modelled on 5.6.5). During the discussion, the JSC agreed to change 6.28.5.3 (Variant access point representing an expression of a religious work) to make it clear that you start with the preferred access point for the work. Adam Schiff noted this would mean changes to some of the examples.

**Action=Editor; Examples Group 2**

231.11.2 Line 78: 5.7.2 It is extremely important to have title alone as a variant access point. The variant access point as a whole should be constructed as if it were the preferred access point. (ALA)

It was noted that while a title alone as a variant access point is not required in scenario 1, it is current NACO practice. The JSC agreed that there would be a separate instruction at 6.1.4.1 allowing the title alone to be used as a variant access point. The Chair noted that this was the same as the ALA suggestion at line 166 in the response table.

**Action=Editor**

John Attig explained that in terms of the second part of the ALA comment, an example would be Canadian bodies that have both a French and English form of name. He said that some in ALA thought that the French form of name should be used with a French variant title. The Editor noted that this would lead to split files. The JSC decided that no change would be made.

231.12 Chapter 6

231.12.1 Line 100: The element Title of the expression is missing. This is a vital element for identifying an expression. Given that the preferred title of the expression is based on the preferred title of the work and ignores the title of the expression, the title of the expression needs to be recorded as a variant and is worth defining as a separate element subtype. (ALA)



The Editor noted that it had just been agreed that a variant title for the expression would be based on the variant title for the work. John Attig commented that variant titles for expressions could be covered by the instruction to create variant titles for titles on manifestations. The Editor noted that variant titles for alternative linguistic forms would often be the title of the expression. The JSC discussed the general guidelines on variant titles at 6.3.0.3. The JSC decided to add “of the work” to 6.3.0.1.1 as suggested by CCC (line 231). The JSC agreed to move the footnote at 6.3.0.3.2 to become part of the instruction (line 232).

**Action=Editor**

The JSC agreed that there would be no element in RDA for title of expression. Barbara Tillett said that she would be proposing to the FRBR Review Group that it was not appropriate to have an attribute for title of expression in FRBR. The Chair said that it was important to document differences between RDA and FRBR/FRAD, and she would think about the best place to record these. The Editor suggested that eventually differences could be noted in the mapping.

**Action=Secretary (Differences from FRBR/FRAD)**

231.13 6.1 Constructing access points to represent works and expressions

231.13.1 Line 111: A designation of role might usefully be associated with the name of the creator. Given that such designations are defined in a completely different context in Chapter 18, we are not sure how to bring that concept to bear in these instructions, but we believe it is important (and include in examples) (ALA)

Barbara Tillett confirmed that ALA was suggesting that roles be built into preferred access points. The Chair asked why this would be useful. John Attig replied that it indicated the relationship between the name and the title. The JSC discussed the ALA comment and agreed that roles would not be included in preferred access points for works, as it could result in spilt files in cases where different designations of role were added, or none was added. It was noted that the optional AACR2 designations of function (21.0D) were not included in name-title access points or authority records.

231.14 6.1.1 Preferred access point representing a work

231.14.1 Line 112: If the concept of originating body is not retained, then the question of when a corporate body can be considered the creator of a work needs to be specified, either under the Creator element in Chapter 19 or in 6.1.1. In either case, the critical rules from AACR 21.1b1 need to be applied in order to determine whether to include the name of a corporate body in the access point for a work.(ALA); Suggested discussion topic: A corporate body as a creator, the identification of an “originating body,” and the AACR2 21.2B categories. See proposed discussion paper and response at 6.1.1.1 and 6.1.1.2 (LC)

The Chair noted that these comments had been covered by the discussion on 5JSC/LC rep/2 (5JSC/M/231.3-5).

231.15 6.1.1.0 General guidelines on constructing preferred access points representing works

231.15.1 Line 117: New topic for discussion: concept of change over time when naming the work (LC)

Barbara Tillett explained that there needed to be a connection between 1.6 (Changes requiring a new description) and naming the work. The JSC members said that they

wanted more information on what was being proposed. Barbara Tillett and Judy Kuhagen said that they would prepare a paper for discussion that week (see 5JSC/M/256).

- 231.15.2 Line 118: New topic for discussion: Need to clearly delineate "work" and "expression" as concepts in RDA e.g., specify what to do in the case of moving image works/expressions (LC)

The JSC decided to discuss this in the context of the appendix on roles (see 5JSC/M/245.9).

- 231.16 6.1.1.1 Works created by one person, family, or corporate body

- 231.16.1 Line 119: 6.1.1.1 and 6.1.1.2: see response (LC)

The Chair noted that this comment had been covered by the discussion on 5JSC/LC rep/2 (5JSC/M/231.3-5).

- 231.16.2 Line 120: 6.1.1.1-6.1.1.3 - Make "creator" explicit (ACOC)

The JSC agreed that it should be made explicit at 6.1.1.3.1 that the compiler is the creator (similar to CCC suggestion at line 129). Barbara Tillett pointed out that the alternative at 6.1.1.3.2 was not an alternative to 6.1.1.3.1 as it dealt with more than one compiler. The JSC agreed that an instruction was missing for more than one compiler. The JSC agreed with the CCC wording for this instruction given at line 130, but not to the CCC suggestion to delete the alternative. The Editor said that he would decide whether a reference to the instructions on collaborative works would be sufficient.

**Action=Editor**

- 231.17 6.1.1.2 Collaborative works

- 231.17.1 Line 121: 6.1.1.2.1: The change in the preferred access point from prominence to first named should be noted as an AACR2 change (CCC); 6.1.1.2.1 a) Suggested discussion topic: Primary responsibility indicated on resource. See proposed discussion paper (LC)

The Chair noted that these comments had been covered by the discussion on 5JSC/LC rep/2 (5JSC/M/231.3-5).

- 231.17.2 Line 122: 6.1.1.2.2: How can a preferred access point representing the work include all creators/compilers? (CCC)

Margaret Stewart commented that this instruction did not work in the current scenario 2 world. The Chair noted that the alternative had originally been suggested by ACOC to overcome the false limitation in AACR2. The JSC decided that it would remain as an alternative. The Secretary noted that this also covered the CCC comment at line 131.

- 231.18 6.1.1.4 Adaptations and revisions

- 231.18.1 Line 137: 6.1.1.4 Have separate instructions for adaptations and revisions, indicating explicitly that adaptation nearly always produces a new work, and revision nearly always produces a new expression of the same work. (ALA)

It was noted that ACOC (line 135) and CCC (line 136) had also proposed rewording for 6.1.1.4. The Editor commented that originally there had been separate instructions, but the

JSC had simplified them. The JSC rejected the ALA suggestion to have separate instructions, as the end result in terms of the preferred access point is the same.

The JSC did agree to change the wording at 6.1.1.4 to “If one person, family, or corporate body is presented as responsible for an adaptation or revision of a previously existing work that substantially changes the nature and content of that work, construct ...” (similar to LC comment 2 at Line 138). The JSC agreed to make the same changes at equivalent instructions at 6.1.1.2, 6.1.1.3 and 6.1.1.5. The Chair said that the rewording addressed the ACOC concern at line 135. The JSC decided that the CCC changes at line 136 were not required.

**Action=Editor**

**Executive Session 2****232 Preparation for meeting with Committee of Principals**

232.1 [Note: included in 5JSC/M/Restricted/216-265.]

**End of Executive Session 2****Executive Session 3****233 Meeting with Committee of Principals**

233.1 Received and considered the following document:  
5JSC/Annual report/2007

233.2 [Note: included in 5JSC/M/Restricted/216-265.]

**End of Executive Session 3****Executive Session 4****234 Actions arising out of the JSC Meeting October 2007**

234.1 [Note: included in 5JSC/M/Restricted/216-265.]

**235 Follow-up on meeting with CoP and Co-publishers**

235.1 [Note: included in 5JSC/M/Restricted/216-265.]

**236 Discuss loss of key personnel**

236.1 [Note: included in 5JSC/M/Restricted/216-265.]

**237 Formal recognition of individuals and groups contributing to the development of RDA**

237.1 [Note: included in 5JSC/M/Restricted/216-265.]

**End of Executive Session 4**

**238 RDA Section 2 (chapters 5-6): Recording attributes of work and expression (continued)**

## 238.1 6.1.1.4 Adaptations and revisions (continued)

238.1.1 Line 142: 6.1.1.4.4 and 6.1.1.5.3. FRBR would suggest that any expression can be named, even if there is only one expression of a given work. RDA seems to suggest that there are cases in which it is not appropriate to name the expression. We note, however, that these two instructions do not exhaust the relevant cases. Furthermore, the instructions do not address the cases in which the access point may in fact identify a group of expressions, e.g., when the access point for a translation names the language but not the translator. (ALA)

John Attig noted that ALA did not have a specific proposal. The Editor said that FRBR did not name every expression, and made it clear that expressions are where you see them. John Attig said that he would not pursue the comment.

## 238.2 6.1.1.5 Commentary, annotations, illustrative content, etc. added to a previously existing work

238.2.1 Line 144: 6.1.1.5. The implications of the recently-published revisions to FRBR need to be taken into account. The question of “augmentations” is particularly difficult in the case of videorecordings, which are often issued with extensive bonus features of this sort. Some clarification and/or examples would be helpful. (ALA)

John Attig noted that the recent changes to FRBR had already been discussed (5JSC/M/225.8.4).

## 238.3 6.1.2.2 One part

238.3.1 Line 157: 6.1.2.2. ALA is not convinced that naming parts subordinately to the name for the whole work is an improvement or simplification.

(Post-meeting note: During discussion of Line 73 in the response table at the 21 July 2008 teleconference, the JSC decided to reinstate the provisions of AACR2 25.6A. There will be an exception for serials and integrating resources to add the title of the part, section, or supplement to the preferred access point representing the work as a whole.)

**Action=Editor**

## 238.4 6.1.2.3 Two or more parts

238.4.1 Line 160: 6.1.2.3.3 Strongly disagree with alternative. Would support an alternative to identify incomplete expressions, this may mean reinstating "Selections" (ALA); 6.1.2.3.3: Add a term (perhaps “excerpts” or “extracts”) so that it is clear that the aggregate of parts of a work is not misidentified as the complete work. (LC)

It was noted that the following line numbers raised similar issues:

## 6.2.6.3 Two or more parts

Line 214: 6.2.6.3.3: retain use of "Selections" (AACR2) (CCC); 6.2.6.3.2: Add a term (perhaps “excerpts” or “extracts”) so it is clear that the aggregate of parts of a work is not misidentified as the complete work. (LC); Discuss LC. What arguments

are there in favour of the different alternatives "excerpts", "extracts", "selections" or "parts"? (ACOC)

#### 6.2.7 Compilations of works

Line 216: 6.2.7.1 -6.2.7.3: Make these sections optional. The replacement of "Selections" in AACR2 with "Selected works" in RDA doesn't solve any of the problems in AACR2. LCRIs advise cataloguers to assign those collective titles only if the title is not distinctive (LC); Re LC: Will Selections decision apply? Agree should be optional. We would welcome further discussion of the usefulness of these instructions, and whether they should only be assigned if the title is not distinctive. (ACOC)

##### 6.2.7.3 Other compilations of two or more works

Line 223: 6.2.7.3.1 Retain use of "Selections" (ALA); 6.2.7.3.1: retain use of "Selections" (AACR2) (CCC); 6.2.7.3.1: prefer genre followed by "Selections" (AACR2) (CILIP)

Line 225: 6.2.7.3.2. ALA does not see the creation of separate analytic access points as an alternative to using the preferred title for the compilation. One may choose to do both.(ALA); 6.2.7.3.2: Change this alternative to an optional addition. (LC); 6.2.7.3.2: ACOC had assumed that the decision made at the October JSC meeting (see M/187.17.1) meant that the alternative would be the instruction, and so would welcome further discussion to resolve this. (ACOC)

##### 6.17.2.3 Two or more parts

Line 310: 6.17.2.3.3: retain use of "Selections" (AACR2) (CCC)

#### 6.29.7 Parts of the Bible

Line 409: 6.29.7.7 and 6.29.8.3.1. See our recommendation at 6.1.2.3 that "Selections" be added to the access point for a work to identify an incomplete expression of that work. (ALA); 6.29.7.7: Add a term (perhaps "excerpts" or "extracts") so that it is clear that the aggregate of parts of a work is not misidentified as the complete work. (LC)

#### 6.29.8 Parts of the Talmud

Line 410: 6.29.7.7 and 6.29.8.3.1. See our recommendation at 6.1.2.3 that "Selections" be added to the access point for a work to identify an incomplete expression of that work. (ALA); 6.29.8.3: Add a term (perhaps "excerpts" or "extracts") so that it is clear that the aggregate of parts of a work is not misidentified as the complete work. (LC)

The JSC discussed the issue at length, and decided to retain the AACR2 use of "Selections" as an addition to preferred titles and as a preferred title. The JSC agreed to reverse 6.3.7.3.1 and 6.2.7.3.2, so that the default is to create separate access points for each of the works in a compilation, with an alternative (either instead of or in addition) to use a conventional collective title followed by "Selections".

#### **Action=Editor**

#### 238.5 6.2.4 Manuscripts and manuscript groups

238.5.1 Line 205: 6.2.4.1 Delete or preferably, move to a section dealing with preferred titles for items, and the text of the instruction should make it clear that what is being named is the "manuscript or manuscript group". (ALA)

John Attig said that the ALA position was that the intention of the relevant instructions in AACR2 was to name manifestations and items. The Editor said that the instructions in AACR2 came from chapter 25 which was about naming works, and that the name of the item was used as a surrogate for the name of the work. He suggested that if subject access

was required for physical entities, these would be treated as objects. The JSC decided to add the creation of access points for manifestations and items to the list of issues deferred until after the first release of RDA.

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

238.6 6.2.5 Incunabula

- 238.6.1 Line 207: 6.2.5.1: “incunable” is now more common in English than “incunabulum”.(ALA)

The JSC agreed to use “incunable” for the singular and “incunabula” for the plural to match common English usage. The Editor noted that this mixed English and Latin forms.

**Action=Editor**

- 238.6.2 Line 208: 6.2.5.1: Delete, or perhaps move to a section on naming manifestations or items (ALA)

It was noted that this was covered by the discussion on line 205.

238.7 6.2.6.2 One part

- 238.7.1 Line 210: 6.2.6.2.2 The concept of recording the preferred title of the part as a subdivision of the preferred access point for the whole work is missing from this instruction. (ACOC); 6.2.6.2.1: Instruction in confusing. (see comment at 5.6.4). Consider the preferred title of the part to consist of the title of the larger work plus the title of the part, and to consider the title of the part alone as a variant title of the work. (ALA)

The JSC decided that no change was required because the comments are to do with construction of the preferred access point. The Editor noted that the current instructions are amenable to all implementation scenarios. It was agreed that this was a training issue.

**Action=Secretary (List of training issues)**

238.8 6.4 Form of work

- 238.8.1 Line 241: (1) Some guidance could usefully be provided about the types of forms that are suitable and not suitable for additions to works. ACOC notes that although this element is equivalent to FRAD 4.4. Form of work, the description in FRAD “Includes forms, genres, etc. (e.g., novel, play, poem, essay, biography, symphony, concerto, sonata, map, drawing, painting, photograph, etc.)” would conflict with RDA. (2) ACOC also notes the potential for overlap with 6.11 Content type which is an attribute at the expression level, equivalent to FRAD 4.5 Form of Expression. (ACOC); 6.4. ALA would like clarification on the distinction between this element and Content Type (6.11) and the relation of both to the Content Type element that was formerly included in the draft of the old Chapter 4. Also required for expressions. (ALA)

The JSC discussed whether the same terms could be used at 6.4 and at 7.2 Nature of content. The Editor noted that 7.2 referred to the terms in Appendix M (5JSC/Editor/RDA/Appendix M), which were derived from MARC 21 field 008. The JSC decided not to use the list in Appendix M, as the terms are in plural, and it contains a mix of types of terms. Adam Schiff noted that 7.2 was to do with selection, while 6.4 was concerned with identification. The JSC agreed that it was appropriate for 7.2 to allow a more “free-form” description of the content. The Chair noted that the footnote on the use of 6.4 to distinguish would become more prominent. John Attig commented that the

Editor had explained that Content type concatenated the work and expression, which covered the ALA comment.

**Action=Editor**

238.9 6.5.1 Date of creation

- 238.9.1 Line 248: 6.5.1 Will not necessarily be known, and would like the instruction to include further guidance to reduce uncertainty in how to apply it. (ACOC); 6.5.0.1 and 6.5.1.1. The distinction between Date of work and Date of creation is not at all clear. It is difficult to understand how the “first date ... associated with the work” (definition of Date of work) would not be the date of creation. (ALA)

The JSC agreed that a single date was needed to distinguish and that it should be whichever date was most appropriate. The JSC agreed to collapse “Date of work”, “Date of creation” and “Date of first publication or release” into “Date of work”. The JSC decided that the instruction would refer to the “earliest” date associated with a work, and allow for a range of dates. It was noted that the date of publication could be used to infer this date.

**Action=Editor**

238.10 6.5.2 Date of first publication or release

- 238.10.1 Line 253: 6.5.2: Should this be the only date given if the date of creation is not known? Should the cataloguer extrapolate a date of creation? As the element is required, and it can be taken from any source, how much research should be entered into? (ACOC); 6.5.2 One ALA respondent suggested that RDA needed to recognize that some attributes are “computed” based on what data exists in the database against which one is cataloguing. For example, Date of first publication or release is conceptually computed based on the data attributes that exist in applicable manifestations. Other instructions that reference predominance could also be computed in this way. (ALA)

The Chair noted that this was covered by decision at Line 248.

238.11 6.10.0 Basic instructions on recording identifiers for works

- 238.11.1 Line 264: ACOC would like the instruction to explicitly mention the use of record numbers as identifiers (per JSC’s decision to allow this). We would also like to see the discrepancy with FRAD noted (ACOC).

The JSC agreed to note the discrepancy with FRAD. It was noted that this also covered the similar ACOC comment at line 297.

**Action=Secretary (Differences from FRBR/FRAD)**

238.12 6.11 Content type

- 238.12.1 Line 267: 6.11. Assuming that this is the element that was included in the former draft of Chapter 4, we are not sure that it should be placed here as an attribute of the expression. Separate work- and expression-related terms (ALA).

John Attig said that this had been clarified with the discussion on line 241.

238.13 6.12 Date of expression



- 238.13.1 Line 276: Will not necessarily be known, and would like the instruction to include further guidance to reduce uncertainty in how to apply it. (ACOC); 6.12. As with Date of work (6.5), we find it difficult to imagine that the date of the expression would be known independently of the date of the earliest manifestation of the expression. At the least, ALA suggests that the element sub-type for Date of earliest manifestation (see our comment at 6.5.2) be added. (ALA)

The JSC decided to add wording to make it clear that this could be the date of the earliest manifestation of the expression. To match 6.5, the JSC agreed to use in the scope the wording “the earliest date associated with the expression”.

**Action=Editor**

- 238.14 6.20.0.13 Indeterminate medium of performance

- 238.14.1 Line 354: 6.20.0.13.1. A critical “not” is missing from this instruction as carried over from AACR2 25.30B11. The instruction should read “Do not record ...” instead of “Do record ...” (ALA)

The JSC agreed to reinstate the “not”.

**Action=Editor**

## 239 Draft of RDA - Section 2 – Chapter 7

- 239.1 Received and considered the following document:  
5JSC/Editor/RDA/ Section 2/Chapter 7
- 239.2 The Editor led a discussion on the issues raised in the cover letter for 5JSC/Editor/RDA/ Section 2/Chapter 7.
- 239.3 General guidelines on transcription and recording numbers expressed as numerals or as words
- 239.3.1 The Editor asked if it was acceptable for him to refer in chapter 7 to the guidelines in chapter 1. The JSC agreed.  
**Action=Editor**
- 239.4 Use of square brackets
- 239.4.1 The Editor noted that the JSC had previously agreed that when information in transcribed elements is taken from outside the resource it would be enclosed in square brackets (or coding would be used, or an annotation made). He asked whether it was appropriate to specify use of square brackets in some instructions on recording scale (7.17.0.3.4-7.17.0.3.6 and 7.17.0.3.8). John Attig noted that map cataloguers treated scale as if it was transcribed. The Chair commented that it was a recorded element which could be taken from any source. She asked if there was any justification for going against the general principle and putting this information in square brackets. John Attig explained that it was a convention in the map cataloguing community. After discussion, the JSC asked the Editor to remove the specification to use square brackets.  
**Action=Editor; Secretary (List of AACR2 changes)**
- 239.5 Hyphens versus dashes

- 239.5.1 The Editor explained that the term “hyphen” was used in the instruction at 7.17.0.4.1 and the term “dash” was used in the instructions at 7.19.1.3.2 and 7.19.1.3.3. He added that in all three cases, the punctuation specified in the instruction is being used to indicate a range of consecutive numbers. The Editor noted that there was no perceptible difference between the character displayed when inputting a hyphen using a standard keyboard and the character displayed when using the Insert function on an MS Word toolbar and selecting an en dash from the special characters menu. The JSC decided that only hyphens would be specified in RDA instructions.  
**Action=Editor**
- 239.6 Capitalization
- 239.6.1 The Editor explained that a decision will need to be made on whether the first word should be capitalized when recording details in place of or in addition to specified terms (e.g., at 7.2.0.4.1, 7.4.0.4.1, 7.9.0.4.1, 7.10.1.4.1, 7.10.2.4.1, 7.10.3.4.1, 7.11.0.4.1, and 7.13.0.4.1)
- 239.6.2 The JSC agreed that the first word should be capitalized in these cases, and asked the Appendices Working Group to draft some wording for Appendix A.  
**Action=Appendices Working Group**
- 239.7 7.2 Nature of the content
- 239.7.1 The Editor noted that none of the JSC representatives had liked the list of terms designating nature of the content in the draft Appendix M (5JSC/M/238.8.1). The JSC agreed that there would be no controlled list. The Editor said that he would revert to text used in an earlier draft.  
**Action=Editor**
- 239.8 7.3 Coverage of the content
- 239.8.1 The Editor said this issue was raised in the cover letter for the September 2007 version of chapter 4, and the JSC had since discussed it via the wiki. The JSC decided that it did not want to specify controlled vocabularies for geographical coverage and chronological coverage. The JSC asked the Editor to parallel the instructions with those at 7.2.  
**Action=Editor**
- 239.9 7.4 Intended audience
- 239.9.1 The JSC decided that it did not want to have a controlled list of terms for intended audience for the first release of RDA. The JSC agreed to consider in the future whether or not to develop a list or to point out to external lists. In terms of controlled lists in general, there was some discussion as to whether use of a different vocabulary should be presented as an option in the General Introduction or whether the option should appear with each instruction.  
**Action=Secretary (List of issues for consideration after the first release of RDA)**
- 239.9.2 The JSC agreed that 7.4.0.3.1 would be revised, 7.4.0.3.2 and 7.4.0.4.1 would be deleted, and the examples currently under 7.4.0.4.1 would be moved under 7.4.0.3.1.  
**Action=Editor**
- 239.10 7.5.0.3 Summarizing the content

239.10.1 The Editor explained that the instruction at 7.5.0.3.1 had been revised to include “if considered to be important for access” as suggested by the ACOC rep and agreed at line 633 in the February 2008 wiki for remaining line numbers Chapters 4-5. He noted that in chapter 7 the standard wording of the phrase is “if considered to be important for identification or selection.” The JSC agreed to change the wording.

**Action=Editor**

239.10.2 The Editor said that 7.5.0.3.2 (“Provide a summary for resources designed for use by persons with disabilities”) appeared to be redundant as it had been agreed in the wiki to add the parenthetical “e.g., for audiovisual resources or for resources designed for use by persons with disabilities” to the instruction at 7.5.0.3.1. The JSC agreed that 7.5.0.3.2 was no longer required. The JSC decided that for consistency, 7.4.0.4.2 would become a parenthetical at 7.4.0.3.1.

**Action=Editor**

239.11 7.8 Place and date of capture

239.11.1 The Editor said that further discussion is required on whether place and date of capture should be treated as sub-elements (as in the current draft) or as separate elements. The Chair noted that this had been discussed at 4.9 in the wiki, and that opinion was divided. The JSC decided that this information should be kept together and that no change would be made to the draft.

239.12 7.8.2.3 Recording date of capture

239.12.1 The Editor asked whether the form in which the date is to be recorded should be specified. He noted that this sub-element was not designed for machine manipulation, and was intended to be read by the catalogue user. The JSC decided to specify the order “year-month-day”, with no punctuation added. This is consistent with the way that dates in access points are recorded. The Chair noted that oral histories were sometimes recorded over a period of years and in that case having the year first would be useful.

**Action=Editor**

239.12.2 The JSC asked Examples Group 1 to change the examples to be in this format, “1997 April 22-23”. The JSC agreed that it was not necessary to have an example showing the time of capture.

**Action=Examples Group 1**

239.13 7.9 Language of the content

239.13.1 The Editor explained that the instructions under 7.9 needed to be reviewed in relation to the instructions on language of expression under 6.13 in section 2, chapter 6. The JSC decided that both instructions are required, as one of the instructions in chapter 7 allowed you to record more than simply the name of the language. The JSC decided that there would be no reference to the ISO 639-2 list (i.e., 7.9.0.3 would be deleted), and there would only be the instructions at 7.9.0.4 on recording details of language.

**Action=Editor**

239.13.2 It was noted that in practice the instruction in chapter 6 currently only specified that the language of a translation is required. Barbara Tillett said that requiring the language of the expression in every case would have huge implications on access points. The Editor noted that currently “Language of expression is required when needed to distinguish an access

point representing an expression of a work from an access point for different expression of the work”. He said that it appeared that access point conventions were driving what was recorded.

239.13.3 The JSC agreed that there would probably need to be a teleconference to confirm the core elements. John Attig said that he would consult with specialist cataloguing communities in preparation.

**Action=JSC**

239.14 7.10.1.3 Recording scripts

239.14.1 The Editor explained that the reference to an appendix with a list of terms for scripts has been replaced by a citation and link to the ISO standard on scripts, as suggested by MARBI in response to the discussion paper on encoding RDA in MARC 21. The JSC confirmed that this is acceptable.

239.15 7.10.2.3 Recording music notation systems

239.15.1 John Attig said that he would consult with the MLA regarding terms to be included in the list of terms for music notation systems. The Chair said that the aim was to have terms for the most commonly encountered situations.

**Action=ALA representative**

239.16 7.11.0.3 Recording illustrative content

239.16.1 The Editor said that Examples Group 1 had noted that the optional addition at 7.11.0.3.2, as currently worded, would require “illustrations” to be recorded as well as the term or terms designating specific types of illustrations. He added that the corresponding rule in AACR2 (2.5C2) allows for one or more specific terms to be recorded either in place of or in addition to the abbreviation “ill.”. The Chair noted that comments had been made at Line 349 in the chapter 3 wiki (chapter 4 addenda). The JSC decided that 7.11.0.3.2 would become an alternative to say that the terms can be used in place of, or in addition to, “illustrations”.

**Action=Editor**

239.17 7.12.0.3 Recording the format of notated music

239.17.1 John Attig asked if this was equivalent to area 3 in AACR2. The Editor agreed and added that if you were recording this information as a statement it would be an edition statement as agreed by the JSC at a teleconference.

239.17.2 It was noted that the list for extent of music at 3.4.2.1 was close to what is needed. John Attig said that he would consult with the MLA regarding whether the list at 3.4.2.1 could be used at 7.12.0.3. The Editor said that ideally the list would only be included in RDA once, in chapter 7.

**Action=ALA representative**

239.17.3 The Editor commented that it was not just the list at 3.4.2.1 which needed to be referred to, as there were instructions for other notated music formats at 3.4.2.2.

239.18 7.13.0.3 Recording medium of performance

239.19 The Editor asked whether the list of terms for MARC 21 field 048 could be used. John Attig said that he would ask the MLA about which terms should be included in the list of terms for medium of performance.

**Action=ALA representative**

239.20 7.17 Scale

239.20.1 The Editor noted that provision for recording scale in a form other than a representative fraction had been added as an alternative at 7.17.0.3.2. He asked if the limitation to content other than cartographic content was appropriate. The JSC agreed that the limitation was appropriate.

239.21 7.19 Coordinates; 7.20 Equinox; 7.21 Epoch

239.21.1 The Editor said that the next issue for discussion was which of these elements should be required. He added that the following question had been posed in the wiki "All of the element sub-types for coordinates of cartographic content have been designated as required. The elements for equinox and epoch (formerly treated as part of the coordinates element) have also been designated as required. Is this appropriate?". He noted that there had been a variety of opinions in the JSC wiki.

239.21.2 The Editor said that he had labelled equinox and epoch as required because of AACR2 3.3D2. He explained that this rule told you how to record ascension and declination, and then said "When coordinates are given, also give the statement of equinox. ... Give also a statement of the epoch when it is known to differ from the equinox."

239.21.3 Barbara Tillett said that LC agreed with BL that neither coordinates nor equinox/epoch should be required elements. John Attig said that ALA felt strongly that cataloguers should not be required to give coordinates if they cannot be taken directly from the resource.

239.21.4 The JSC decided that coordinates, epoch, and equinox would all be optional in RDA, and it would be left up to separate application instructions or specialist manuals to specify anything further.

**Action=Editor**

239.21.5 The JSC decided that it would be useful to make the link between recording right ascension and declination and equinox, e.g., "When recording right ascension and declination, also record equinox."

**Action=Editor**

239.21.6 The Secretary explained there was still an ALA comment from the cartographic wiki to be discussed "4.21.1.2.2: Delete this instruction or at least make it optional." [Note instruction now at 7.19.1.2.2: "If information on longitude and latitude is not provided within the resource, take the information from any source."] The JSC decided that this was no longer an issue if the element is optional. Adam Schiff asked why the instruction at 7.19.1.2.2 was not possible for other types of coordinates. The JSC decided to add the same instruction at 7.19.0.2.2, 7.19.2.2.2, and 7.19.3.2.2.

**Action=Editor**

239.21.7 The Editor confirmed with the JSC that the instructions about internal punctuation in 4.21 would remain.

- 239.21.8 The Chair explained that according to the decision made in the wiki (Chapters 4-5 (February 2008) Cover letter questions) the abbreviations for “right ascension” (“RA”) and “declination” (“decl.”) had been removed.  
**Action=Secretary (List of AACR2 changes)**
- 239.22 Video format characteristics
- 239.22.1 The Chair noted that the JSC needed to discuss where in chapter 4 to place instructions on audio narration and captioning as originally proposed in 5JSC/LC/9/CILIP response (5JSC/M/105.9.1 and 5JSC/M/105.9.4).
- 239.22.2 The JSC decided to have a new element to cover captioning, audio narration, and inclusion of sign language in a video recording (e.g., a person doing sign language in the corner of a video). It was tentatively agreed to call this element “Interpretive content” and that it would be placed somewhere around 7.11. (Post-meeting note: it was later agreed to call this element “Accessibility content”.)
- 239.22.3 The JSC asked the CILIP representative to prepare a brief outline of what would be included in the element.  
**Action=CILIP representative**
- 239.23 Script
- 239.23.1 The Editor noted that the JSC members had been asked to read some emails between himself and Charles Husbands regarding the definition of “Script”. The JSC decided to change the definition at 7.10.1.1.1 to remove “writing systems”, i.e., to say “Script is a set of symbols used to express the language content of a resource”.  
**Action=Editor**
- 239.24 The Chair led a discussion on the “Comments on Draft of RDA – Section 1 – Chapter 7” compiled from JSC representative comments.
- 239.25 ACOC: “The reason for the division between Chapter 6 and 7 is unclear from the draft. It may be that a section overview is required in Chapter 5, or it may be that these chapters should be merged.”
- 239.25.1 The JSC asked the Editor to explain the rationale further at 5.0 and 7.0. The Editor said that he would emphasise the division according to user tasks.  
**Action=Editor**
- 239.26 LC: ““Details on ...”: LC was questioning why the wording had changed from “annotations on” to “details on.” Then the status column comment at line 292 in the ch. 3 wiki about recording the details as part of the element really confused us: “All ‘Notes on ...’ element sub-types to be eliminated (see revised Element analysis table). Details to be recorded as part of element.” LC notes that not all elements in ch. 7 have a “Details on ...” instruction.”
- 239.26.1 The Chair noted that this had already been covered in the meeting (5JSC/M/227.15.2). She suggested that this issue be highlighted in the cover letter.  
**Action=Secretary (Cover letter for full draft)**
- 239.27 7.0 Purpose and Scope

- 239.27.1 ACOC: “One of the dictionary definitions for content is ‘the chief topics of a book or document’. There is a potential for overlap between content as defined for Chapter 7 and subject as treated in *Section 7: Recording subject relationships*. It would seem necessary to add a definition of content to the Purpose and Scope, and to refer in some way to Section 7.”
- 239.27.2 The JSC asked the Editor to include a reference to Section 7 as a new paragraph 7.0.4. It was noted that Section 7 would be a placeholder.  
**Action=Editor**
- 239.27.3 7.0.2 ACOC suggested rewording  
  
The Chair suggested that this be referred to the Editor for consideration.  
**Action=Editor**
- 239.28 7.2 Nature of content / 7.3 Coverage of content
- 239.28.1 The Chair said that the ACOC comments had been covered by the earlier discussion on these elements.
- 239.29 7.5 Summarization of the content
- 239.29.1 The Chair suggested that the ACOC suggested rewording be referred to the Editor for consideration. The Editor noted that the name of the element was taken from FRBR.  
**Action=Editor**
- 239.30 7.7 Dissertation or thesis information
- 239.30.1 CCC: “We would like to suggest expanding the scope of “dissertation or thesis information” (7.7.0.1.1) to include information relating to works presented as non-academic theses, such as reports submitted as part of fellowships or internships at research institutes. It would be more meaningful to give this type of information here rather than as a “nature of contents” annotation, since information on the Granting institution or faculty (7.7.2) and the Year degree granted (7.7.3) are both available. Post-doctoral theses would also fall into such a category; *fellowship, internship, post-doctoral* could be terms recorded at 7.7.1.3.”
- 239.30.2 The JSC members said that they wanted to see examples prior to making a decision. Margaret Stewart said that she would obtain examples of the additional types of resources that CCC wanted to include in 7.7. Later in the meeting Margaret Stewart said that she had consulted with colleagues at LAC and that they now thought that these resources would be covered by the nature of the contents element.
- 239.31 The Chair said that there was no need for the JSC to discuss the remaining comments from ACOC, and referred them to the Editor for consideration.  
**Action=Editor**
- 239.32 The Chair led a discussion of the unshaded line numbers in the “Extract from wiki for Chapter 3 (Chapter 4 addendum)”.
- 239.33 4.2.0.2 Recording content type [now 6.11.0.3]
- 239.33.1 Line 338: 4.2.0.2.1: Delete second sentence and alternative (ALA)

John Attig explained that he had provided some suggested wording to eliminate the instruction to record only the type that applies to the predominant or most substantial part. The Editor noted that the alternative had been agreed with the ONIX group. John Attig withdrew the suggestion.

- 239.33.2 Line 339: The layout should more clearly indicate the relationship of the table to the preceding instructions or the list of terms should be moved to an appendix.

The Chair noted that this was a layout issue, and did not need to be discussed.

- 239.34 4.9 Illustrative content [now 7.11]

- 239.34.1 Line 348: Should this element be limited to the sort of graphic illustrative matter typically appearing in printed texts or should a broader approach to illustrative matter be taken? (ALA)

John Attig explained that if the intent was not to limit the element, then ALA wanted to point out that all of the terms at 7.11.0.3.2 applied to printed texts. The Editor noted that there was no limitation in the scope of the element, and that 7.11.0.3.2 would now be an alternative (5JSC/M/239.15). John Attig said that if ALA wanted to extend the list it would do so after the first release.

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

- 239.35 4.9.0.3 Recording illustrative content [now 7.11.03]

- 239.35.1 Line 350: Add “graphs” (ALA)

The JSC agreed.

**Action=Editor**

- 239.35.2 Line 351: 4.9.0.3.2: If "plate" is considered a type of illustrative content, address in glossary definition (CCC); 4.9.0.3.2: remove "illuminations" and "plates" from the list (CILIP)

The JSC agreed to remove “plates” from the list as they are covered by instructions in extent. The JSC decided to retain “illuminations” as this seemed the best place to cover them.

**Action=Editor**

- 239.36 4.12 Duration [now 7.14]

- 239.36.1 Line 352: Recommend that the use of the W3C DTF encoding format be prescribed (or at least encouraged) (ALA); 4.12.0.3 Use colon format. If not agreed, add text. (CCC)

The Chair explained that the W3 format (<http://www.w3.org/TR/NOTE-datettime>) only covered how to record specific times and dates and not duration. The JSC decided not to refer to any standard or specify any format.

The JSC discussed the example “9:41; 16:00; 24:00” at 7.14.0.5.1 and agreed that it was ambiguous as to whether the durations were hours and minutes or minutes and seconds. The JSC asked Examples Group 1 to change the example to HH:MM:SS format, or to find a more meaningful example.

**Action=Examples Group 1**



## 240 RDA Section 3 (chapters 8-11): Recording attributes of person, family, and corporate body

240.1 The Chair led a discussion of priority issues in the response table for the draft of Sections 2-4 and 9.

240.2 8.3 Required elements

240.2.1 Line 439: Relationship to Functional objectives and principles: Acknowledge that elements are required in order to meet functional objectives and principles. Address role of preferred access points (ACOC)

Line 440: Request discussion as to whether preferred access points are necessary in scenario 1 (ACOC)

The JSC asked the Editor to add wording to the General introduction, chapter 5, and chapter 8 to make clear the function of access points and the relationship of access points to the elements in these chapters.

**Action=Editor**

240.2.2 Line 444: 8.3.2: ALA urges that the elements be listed as required for describing the entity; that a separate sub-instruction be devoted to the construction of access points based on the preferred name or title of the entity; that a further sub-instruction be devoted to the construction of a unique access point, if desired, by adding other elements to the preferred name; that the preferred name be listed as a required element for each entity, but that the potential additions used to differentiate identical names not be listed (or labeled) as required. (ALA)

John Attig noted that similar comments had been discussed at line 39 (5JSC/M/231.9.7). The Editor said that he would be neutralising the references to access points in the notes on core elements. He added that where ALA had suggested “describing the entity”, he had used “identifying”. John Attig said that he agreed as this was more precise.

240.3 8.11.0 Basic instructions on recording an undifferentiated name indicator

240.3.1 Line 478: 8.11 To account for future practice, make it clear that it is the name which is undifferentiated, not the record. (ALA)

The Editor noted that there was a problem with the scope of the element as it referred to access points. He suggested that the following wording be used: “An undifferentiated name indicator is a term indicating that the core elements recorded are insufficient to differentiate between two or more entities identified with the same name.” He said that the same change would need to be made at 8.11.0.3. The JSC agreed.

**Action=Editor**

Barbara Tillett suggested that “term or code” be used. The JSC discussed the issue and agreed that text would be added to the General Introduction to say that in cases where there is a controlled list of terms, a term or code from another list may be used so long as the vocabulary encoding scheme is identified. The Editor noted that this would also apply when a different syntax is used for a typed value (e.g., the ISBN). The Editor said that he would add a new section to the General Introduction on encoding.

**Action=Editor**

240.4 9.1.1.1 General guidelines on constructing preferred access points to represent persons

- 240.4.1 Line 496: 9.1.1.1.1 Replace with very simple basic instructions see wording and rationale (ALA)

The Editor commented that the ALA suggested wording was not in the imperative, and also that he thought the intent was covered by 9.1.1.1.1 and 9.1.1.1.2. John Attig agreed and said that no change was required. Hugh Taylor asked whether “as applicable” in 9.1.1.1.2 could be spelt out as being needed for differentiation. The Editor noted that in some cases (e.g., in the case of “Saint”) the instruction was simply to make the addition.

- 240.4.2 Line 497: 9.1.1.1.2: see recommendations regarding "in the order listed" (ALA); 9.1.1.1.2: Delete "in the order listed". The order of the additions to access points at 9.1.1.2-9.1.1.4 is already reflected in the instructions (CCC); 9.1.1.1.2 problems with "in the order listed", see rewording (LC)

The Editor explained that “the order listed” referred to the order in which you apply the instructions. The JSC decided that it would be more appropriate to say “in that order as applicable” at 9.1.1.1.2. The JSC agreed with the LC suggestion that in the order of priority of elements used to distinguish names, “period of activity” be listed after fuller form of name. The Editor said that he would add a new instruction at 9.1.1.5 for “period of activity”, and limit 9.1.1.3 to date of birth and/or date of death. Adam Schiff asked about the existing practice of recording both the fuller form of name and the date. The Editor said that he would make it clear at the optional addition at 9.1.1.4.2 that the fuller form of name is added before the date of birth and/or death.

**Action=Editor**

- 240.5 9.2.1.2 Language

- 240.5.1 9.2.1.2. ALA notes the tension between the principle adopted here (prefer the language most often used in works by the person) and the principle adopted elsewhere (prefer the language preferred by the agency creating the data or best suited to the users of the catalogue). Difference in opinion in ALA about which to follow. (ALA)

Barbara Tillett said that she had already noted the discrepancy between IME 6.2 and 6.3.4.1 (5JSC/M/231.7.1). The JSC discussed the issue and confirmed that there is a preference for the language form found on most of the resources. It was noted that the exceptions were based on user convenience. The Chair said that the JSC still needed to discuss the general principle at 8.2.4 which covers persons, families, and corporate bodies.

**Action=JSC**

- 240.6 9.2.3 Change of name

- 240.6.1 Line 520: 9.2.3. There is considerable support within ALA for adopting the same instruction regarding change of name as applies to corporate bodies. This is particularly true because of the instructions at 9.2.4 to treat variations of name as separate identities. This instruction should explicitly address the issue of a person’s change of name once they have established an identity under an earlier name (cf. 11.2.1.5a.1 footnote 6). This suggests that in practice the distinction between a change of name and separate identities may not be sustainable. (ALA)

John Attig noted that ALA was open to significant changes in this area. The JSC decided that was an issue that could take a long time to resolve, and to add it to the list of issues for consideration after the first release of RDA.

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

## 240.7 9.2.4 Individuals with more than one identity

## 240.7.1 Line 522: Prefer to use "person" rather than "individual" (ACOC)

The Editor explained that the footnote at 9.0.1.1 made it clear that “person” refers to an individual or to an identity established by an individual (either alone or in collaboration with another individual). He said that this meant that each identity is a person. The Chair confirmed there would be no change.

## 240.7.2 Line 523: Offer the following definition of pseudonym: "A pseudonym is a name used by a person (either alone or in collaboration with others) that is not the person's real name." (ACOC)

Barbara Tillett said that she liked the definition, but she thought that using “individual” (as had just been discussed) was ambiguous. The JSC referred the suggested definition to the Glossary Editor.

**Action=Glossary Editor**

## 240.7.3 Line 524: Context for instruction is not clear, may be confusing in scenario 2 (ACOC)

The Chair said that there was nothing further to discuss and that the comment was withdrawn.

## 240.7.4 Line 527: 9.2.4.2: Exception is not required. What is ‘exceptional’ is the recording of a person's real name even if it is not used. This could be covered at 9.2.4.3 See wording (ACOC); 9.2.4.2. ALA believes that this instruction is misidentified as an exception. It deals with a person who has only one bibliographic identity, the pseudonym, and is not known by his or her real name. Remove the “Exception” caption. (ALA)

The Editor explained in 9.2.4.1 it said to consider the real name and pseudonym as separate identities, and that therefore it was an exception to only recognise one identity for the individual. The Chair noted that without the exception, an access point control record would be created for the real name even when it was not used “bibliographically”. The JSC agreed that this would not be desirable, and that no change was required.

## 240.7.5 Line 528: 9.2.4.2 delete “as a creator or contributor” (ALA); 9.2.4.2 delete “as a creator or contributor” (LC). Discuss LC. Although the specific role is not significant, the instruction is applied when the real name is not used on resources (ACOC)

Margaret Stewart said that she found this guidance useful. The Editor explained that creator and contributor are the only two roles associated with works and expressions, and that because the real name has not been used in this way, it is treated as a variant. John Attig noted that otherwise, you would have to work out what was meant by “use” in “does not use his or her real name”. Barbara Tillett withdrew the LC comment.

## 240.8 9.8 Gender

## 240.8.1 Line 662: Affirm inclusion of element. See comparison table. Agree with values in draft. Happy to discuss "other" (ACOC). See comments from GLBT Round table. ALA holds differing opinions on whether the element should be deleted. (ALA). The values male, female, and other, are adequate. We would prefer using “not identified” instead of “not

known” (CCC). Make clear that this is a provisional vocabulary pending further research (BL). Values are adequate, better than ISO list (CILIP). Agree with terms in closed list (LC)

The JSC decided to remove the value “other” which is not included in the equivalent lists in INTERMARC, UNIMARC, and ISO/EIC 5218. It was also agreed to add an instruction to allow use of additional values, i.e., “If none of the terms listed is appropriate or sufficiently specific, record an appropriate term or phrase.”

**Action=Editor**

- 240.8.2 Line 663: 9.8.0.3.1. Remove “with which a person identifies”; that is part of the definition of gender in 9.8.0.1.1. (ALA)

John Attig said that this was an Editorial comment. The JSC agreed to make the change.

**Action=Editor**

- 240.9 The Chair noted that there were three issues listed in the agenda as requiring discussion which related to chapter 9.

- 240.9.1 Form of date of birth (5JSC/M/183.49.1)

The Editor suggested that it be made clear at 9.4.1.1.2 that the month will be recorded in the language and script preferred by the agency creating the data. The JSC agreed. The Editor noted that in line with earlier decisions there would be no reference to the appendix on abbreviations (AACR2 change).

**Action=Editor; Secretary (List of AACR2 changes)**

- 240.9.2 Instructions on adding “B.C.” to dates (5JSC/M/183.27.1)

The Editor said that the general guidelines on recording dates associated with persons said to do this in terms of the calendar preferred by the agency creating the data, so it would be anomalous to include instructions on adding “B.C.”. The Secretary suggested that if someone had chosen to use the Christian calendar, they needed to know to use “B.C.”. The JSC decided that Appendix H would be expanded to include instructions on the use of “B.C.” and “A.D.” with the Gregorian and Julian calendars. The Editor commented that the title of the Appendix would need to be changed. Barbara Tillett volunteered to draft the revisions to the Appendix. Adam Schiff suggested that something be included about the limited number of cases in which “A.D.” is used e.g., some spans of dates. Barbara Tillett said that she would incorporate this in the Appendix.

**Action=LC representative**

Judy Kuhagen commented that 6.1.2.0.3.1 did instruct to add “B.C.”. The Editor said that he would change it to match 6.5.0.3.1, i.e., to use the calendar preferred by the agency creating the data (covers ALA and LC comments at line 280).

**Action=Editor**

The Chair noted that consideration of the broader issue of whether to use “B.C.E” and “C.E.” had been deferred until after the first release (ALA comment at line 279).

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

- 240.9.3 RDA instructions requiring further review by the JSC (listed in cover letter of Dec 2007 draft)

The JSC examined the list in the cover letter and agreed that these instructions would all benefit from considered discussion based on a revision proposal, and should be deferred until after the first release of RDA.

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

240.10 Chapter 10

- 240.10.1 Line 688: ALA prefers to base the order of elements and the punctuation on the practice for corporate names, with the date preceding the place of activity inside the parenthesis

John Attig noted that when the instructions were applied the additions were in a appropriate order, and said that he did not wish to pursue the issue (see 5JSC/M/259.10.1).

- 240.11 10.4.0 Basic instructions on recording type of family. Cover letter: Suggestions are requested for additions to the list of values

- 240.11.1 Line 707: No comments on terms. Define terms in Glossary. If necessary, we would support treating the terms for types of families as examples only for the first release of RDA, and the setting up of a working group with members of the archives community to determine appropriate terms to include in a controlled list. (ACOC). Terms need definitions or the instruction needs to include guidance on how to determine the type of family. ALA suggests that it needs to be made explicit whether or not the list of family types is intended to be comprehensive. Additional terms might be “sept” (a branch of a family; related to clan), “moiety” (a subdivision in a tribal group), “tribe,” and other terms used in non-western cultures. (ALA). No further terms to suggest (CCC). Terms are ambiguous, overlap between concepts will cause problems for Dublin Core (BL). Ambiguity in the values. Not possible to apply to the DC structure (CILIP)

The JSC agreed with the ACOC suggestion to treat the terms as examples only for the first release.

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

240.12 Chapter 11

- 240.12.1 Line 736: Merge instructions for government bodies and other corporate bodies. ALA willing to make a proposal (AACR2 change) (ALA)

John Attig said that ALA would consider submitting a proposal on this issue after the first release of RDA.

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

240.13 11.0.1 Purpose and scope

- 240.13.1 Line 737: 11.0.1.1, footnote 1. There needs to be a place other than a footnote for a formal definition of the entity that is the focus of the chapter [ALA follow-up]

The Editor noted that in the online product footnotes would display with the guideline. The Chair suggested that this was acceptable for the present.

- 240.14 The Chair noted that there were two issues listed in the cover letter as requiring further review by the JSC: terms indicating incorporation; and, initial articles used in names of

corporate bodies. The JSC decided that further consideration would be deferred until after the first release.

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

## 241 RDA Section 4 chapter 16: Identifying places

241.1 The Chair led a discussion of priority issues in the response table for the draft of Sections 2-4 and 9.

241.2 Line 888: ALA would welcome an effort to expand the scope of the chapter to deal with all geospatially-defined entities. (ALA)

John Attig commented that this was a suggestion that would require a proposal. He said that ALA would consider pursuing this after the first release.

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

241.3 16.3 Variant name for the place

241.3.1 Line 903: ACOC is uncertain whether variant names for places should be included in the first release of RDA, given the scope of this chapter which is currently limited to place names used as the name of the government, or used in additions to other names. As preferred and variant access points for places are not in scope it is not clear where the variant name for the place would be recorded. (ACOC)

The Editor noted that place names were often the lead element in the name of a corporate body, and that these variants were not covered in the instructions in chapter 11. He also noted that AACR2 did cover references for names of places. The Chair withdrew the ACOC comment.

241.4 16.6 Identifier for the place

241.4.1 Line 913: ACOC is uncertain whether identifiers for places should be included in the first release of RDA, given the scope of this chapter, which is currently limited to place names used as the name of the government, or used in additions to other names. (ACOC). 16.6. ALA supports requiring identifiers for Place, as for other entities. (ALA). Do not require an identifier now (LC)

The Chair suggested that you would not use the identifier for the geographic entity in the access point control record for a jurisdiction. John Attig said that as part of the suggestion to expand the chapter, ALA wanted to clarify the distinction between a geographic place and the jurisdiction that occupies it. The JSC decided that 16.6 would be a placeholder only for the first release. The Chair noted that the JSC did want to do work in this area.

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

241.5 The Chair noted that the cover letter listed one instruction requiring further review by the JSC: 16.2.4 on places in Australia, Canada, Malaysia, the United States, the U.S.S.R., and Yugoslavia. The JSC confirmed that this would be considered after the first release of RDA.

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

241.6 The Chair said that the JSC needed to discuss instructions for names of buildings (5JSC/M/185.21.1) used as locations of conferences. It was noted that comments from LC

on 11.4.1 (Lines 859 and 860 in the response table) covered this issue. The JSC decided to restore AACR2 24.7B4 as an exception at RDA 11.4.1.3, i.e., “Give any other location in the nominative case in the language and form in which it is found”. The JSC agreed that it was acceptable to identify the institution without controlling it, and to leave open the question of what to do when the institution is in more than one language (as in AACR2). Adam Schiff said that he would restore some examples from an earlier draft of the chapter.

**Action=Editor; Examples Group 2**

**242 RDA Section 9 (chapters 29-32): Recording relationships between persons, families and corporate bodies**

242.1 The Chair led a discussion of priority issues in the response table for the draft of Sections 2-4 and 9.

242.2 Line 916: Section 9: RDA needs to record attributes of relationships (ALA)

242.3 29.3 Required elements

242.3.1 Line 924: 29.3.1: See rewording (ACOC)

Line 925: 29.3.1: The required elements need to be presented differently here than in chs. 9-11, as 29.4 allows the relationship to be indicated through an identifier or a preferred access point. (ACOC)

Line 926: 29.3 State first which relationships are required (ALA).

Line 927: Both the name and the identifier are required. The name of the related entity should contain those elements that are listed as required in the appropriate chapter in Section 4. In that context, ALA urged that the requirement be the preferred name and that the elements to be included in a preferred access point should be stated separately. If this recommendation is followed, 29.3.2 should be deleted. (ALA). 29.3.1: Give here only “Preferred access point for the [person, family, or corporate body]” (LC). Disagree LC Because the relationship can be indicated through an identifier or a preferred access point. (ACOC)

Line 928: Delete 29.3.3 (ALA)

The JSC agreed that no relationships between persons, families, and corporate bodies are required and asked the Editor to reword 29.3.

**Action=Editor**

242.4 29.4 Recording relationships between persons, families, and corporate bodies

242.4.1 Line 930: 29.4.2: Discuss what ‘in conjunction with’ means. When used elsewhere in RDA, it is in the context of constructing an access point. (ACOC)

The JSC decided to remove “in conjunction” and use “with”. The Chair noted that ACOC had made similar comments at lines 931, 935, 937, and 939 in the response table, and that the same decision would apply.

**Action=Editor**

**243 Appendix K (Relationship designators: Relationships between persons, families, and corporate bodies)**

243.1 The Chair noted that this Appendix did not yet exist and that responsibility needed to be assigned. Barbara Tillett said that the Library of Congress volunteered to draft the Appendix. The Editor confirmed with Barbara Tillett that LC would also look at FRAD. It was agreed that any discrepancies would be noted.

**Action=LC**

**244 Draft of RDA – Section 6 – Chapters 18-22**

244.1 Received and considered the following document:

5JSC/Editor/RDA/Section 6

244.2 The Editor led a discussion on the issues in the cover letter for 5JSC/Editor/RDA/Section 6.

244.3 18.2 Functional objectives and principles

244.3.1 The Editor explained that a second functional objective had been added at 18.2.1 to reflect the inclusion of relationships to persons, families, and corporate bodies associated with manifestations and items in chapters 21 and 22. He noted that during the discussion on the General Introduction the first functional objective had been changed to “Find -- all resources associated with a particular person, family, or corporate body” (5JSC/M/225.11.4), and so the new functional objective was no longer required.

**Action=Editor**

244.4 18.3 Required elements

244.4.1 The Editor noted that this section would be changed now that “originating body” was no longer a separate element (5JSC/M/231.3). The Chair explained that the definition of “creator” would include a specific definition for corporate bodies. The Editor added that the required elements were still to be discussed.

**Action=JSC**

244.5 18.5.0.3 Recording relationship designators

244.5.1 The Editor suggested that the alternative at 18.5.0.3 to use a standard list could be deleted as it had been agreed that this would be included in the General Introduction (5JSC/M/240.3.1). The JSC agreed.

**Action=Editor**

244.6 18.6 Annotations on persons, families, and corporate bodies associated with a resource

244.6.1 The Editor explained that instructions on annotations had been added as agreed at the December 10/11 teleconference. He asked whether it was acceptable to refer to existing annotation elements in section 1, chapter 2, rather than introducing new annotation elements in section 6.

244.6.2 The Editor said that in practice these were the notes in a bibliographic record that justified an access point. Barbara Tillett asked about recording attribution in a work record as this would apply to many manifestations. The JSC decided to also refer to instructions on



making cataloguer's annotations in chapters 5, 8, and 24 (for series). The Chair confirmed with the JSC that it is acceptable to refer to other sections.

**Action=Editor**

244.7 19.1.1 Sources of information

244.7.1 The Editor asked if the use of the phrase "in the resource being described" in the instructions at 19.1.1.1 and 19.1.1.2 was appropriate in the context of persons, families, and corporate bodies associated with a work. He asked if it should be changed to "in resources embodying the work". The JSC agreed to make the change.

**Action=Editor**

244.8 19.1.2 Recording persons, families, and corporate bodies associated with a work

244.8.1 The Editor said that he was concerned that the instruction at 19.1.2.2 would not be appropriate in a scenario 1 context where the manifestation record for "the resource being described" would be linked to separate work records for each of the works contained in that resource, and each work record would in turn be linked to records for the persons, families, and corporate bodies associated with that work. The JSC decided that no change was necessary.

244.9 19.3 Originating body

244.9.1 The Editor noted that in line with earlier decisions this would be deleted (5JSC/M/231.3).

**Action=Editor**

244.10 19.4.1 Other persons and corporate bodies associated with legal works

244.10.1 The Editor explained that the instructions under 19.4.1 had been reorganized according to role as agreed at the December 10/11 teleconference. He noted that the roles covered under 19.4.1, 19.4.2, and 19.4.3 were not currently in Appendix I.

244.11 19.4.1.21 Court reporter/19.4.1.22 Compiler

244.11.1 The JSC decided that court reporters and compilers of legal works would be covered in chapter 20 as they are associated with the expression.

**Action=Editor**

244.12 19.4.1.23 Issuing body

244.12.1 The Editor noted that the instruction on issuing body (derived from AACR2 rule 21.31B1) applied uniquely to laws. He asked if the instruction could be merged with the instruction on issuing agency or agent under 19.4.1.8. The JSC agreed.

**Action=Editor**

244.13 19.4.2.2 Harmonizer

244.13.1 The JSC agreed with the Editor's suggestion that harmonizers are contributors and should be covered in chapter 20 under Contributor.

**Action=Editor**

244.14 19.4.3 Other persons and corporate bodies associated with official communications

244.14.1 The Editor suggested that if the official and/or person issuing the communication is considered a creator, that official and/or person should be covered under Creator. The JSC agreed, and also agreed that compilers of official communications should be covered in chapter 20.

**Action=Editor**

244.15 20.1.1 Sources of information

244.15.1 The Editor asked if the use of the phrase “in the resource being described” in the instructions at 20.1.1.1 and 20.1.1.2 was appropriate in the context of persons, families, and corporate bodies associated with an expression. He asked if it should be changed to “in resources embodying the expression”. The JSC agreed to make the change.

**Action=Editor**

244.16 20.1.2 Recording persons, families, and corporate bodies associated with an expression

244.16.1 The Editor queried whether 20.1.2.2 was appropriate in a Scenario 1 context where the manifestation record for “the resource being described” would be linked to separate expression records for each of the expressions contained in that resource, and each expression record would in turn be linked to records for the persons, families, and corporate bodies associated with that expression. The JSC decided that no change was necessary.

244.17 21.1.2 Recording persons, families, and corporate bodies associated with a manifestation

244.17.1 The Editor asked if the instruction at 21.1.2.2 was appropriate in a Scenario 1 context where the manifestation record for “the resource being described” (i.e., the aggregate resource) may be linked to separate manifestation records for each of the parts of that aggregate manifestation, and each manifestation record would in turn be linked to records for the persons, families, and corporate bodies associated with that manifestation. The JSC decided that no change was necessary.

244.18 22.1.1 Sources of information

244.18.1 The JSC confirmed agreement with the revised instruction in the draft chapter.

244.19 22.1.2 Recording persons, families, and corporate bodies associated with an item

244.19.1 The Editor asked if the instruction at 22.1.2.2 was appropriate in a Scenario 1 context where the manifestation record for “the resource being described” may be linked to separate item records for each of the items exemplifying that manifestation, and each item record would in turn be linked to records for the persons, families, and corporate bodies associated with that item. The JSC decided that no change was necessary.

244.20 Other persons, families, and corporate bodies associated with an item

244.20.1 The Editor noted that the relationship designators listed under X.4.3 in 5JSC/LC/11 fall outside the scope of the elements defined in the draft of chapter 22. He asked whether it would be sufficient to add an element for “Other person, family, or corporate body associated with an item” to cover all such relationships. The JSC agreed, and asked for an equivalent element to be added for manifestations.

**Action=Editor**

## 244.21 Examples

244.21.1 The JSC referred the following comments in the cover letter to Examples Group 2: “All the examples in chapters 18-22 will need to be reviewed and revised as necessary to illustrate the preferred access point constructed according to instructions in section 3, chapters 9-11. The examples will also have to be reviewed for consistency with appendix B after final decisions are made on the use of abbreviations. The explanatory comments accompanying examples will also need to be reviewed for consistency in wording and appropriateness to the instructions under which they are placed.”

**Action=Examples Group 2**

## 245 Designation of Roles in RDA

245.1 Received and considered the following documents:

5JSC/LC/11

5JSC/LC/11/BL response

5JSC/LC/11/CILIP response

5JSC/LC/11/CCC response

5JSC/LC/11/ALA response

5JSC/LC/11/ACOC response

245.2 The Chair said that before discussion began she wanted to note two relevant comments. Firstly, at Line 118 in the December 2007 draft response table, there was the following comment from LC: “New topic for discussion: Need to clearly delineate "work" and "expression" as concepts in RDA, e.g., specify what to do in the case of moving image works/expressions.” Secondly, the April 2008 interim report from the DCMI/RDA Task Group had specifically mentioned subproperty declarations for roles. The Editor suggested that perhaps the Task Group was querying his assertion that each designation of role must function as an element sub-type of only one of the higher-level elements in chapters 19-22. It was noted that at the 10/11 December 2007 conference call an action was recorded for LC to confirm the Editor’s interpretation with an LC RDF expert. Judy Kuhagen said that she would follow-up on this with Dave Reser during the meeting if possible.

**Action=LC**

245.3 The Chair led a discussion on each of the responses to 5JSC/LC/11.

245.4 5JSC/LC/11/BL response

245.4.1 Animator

The JSC agreed with the BL that in some cases an animator would be a creator, and that a reference would be added, e.g., “If the work is primarily the artistic content created by this entity, see Artist (X.1.1)”.

**Action=LC**

245.4.2 Signer

The BL suggested that “Signatory” be used instead of “Signer” for a person whose manuscript signature appears on an item. Barbara Tillett noted that this could lead to confusion with signatories of treaties. The JSC decided to use “Autographer” instead. The JSC agreed with the BL that it was possible that “signer” might be required at the expression level for someone who communicates by signs.

**Action=LC**

245.5 5JSC/LC/11/CILIP response

245.5.1 The Chair noted that there were no suggested changes to be discussed.

245.6 5JSC/LC/11/CCC response

245.6.1 Specialist communities

It was noted that there would be a general guideline allowing the use of controlled lists developed by other communities (5JSC/M/240.3.1).

245.6.2 Definition of “role”

It was agreed that it was not necessary to define “role” as suggested by CCC, as the term that would be used is “relationship designator”.

245.6.3 Editorial comment

The Editorial comment in the CCC response was referred to LC.

**Action=LC**

245.6.4 The JSC agreed to come back to the CCC suggestions for roles that should be moved from being associated with the expression to being associated with the work (see 5JSC/M/245.9.2-3).

245.7 5JSC/LC/11/ACOC response

245.7.1 Terms recorded in conjunction with access points at the work level

The Chair explained the ACOC concern by reading from the ACOC response: “For example, if an artist is responsible for the creation of an artistic work, the role term “artist” is the only one that can be recorded. If the resource were a print or an etching, the terms “printmaker” and “etcher” would be far more appropriate and useful. However, these terms can only be assigned in conjunction with the access point for the producer of a manifestation.” The Editor noted that the work is at the abstract level, and as such cannot be “etched”. The Chair replied that the work could be conceived as an etching. John Attig suggested that this was done in the role of artist, apart from in the role of etcher. After discussion, Barbara Tillett said that LC would see whether any sub roles could be appropriately added under “artist”.

**Action=LC**

245.7.2 X.2.1

The Chair read from the ACOC response: “ACOC would like the second and later sentences in the instructions under X.2.1 to be clarified. These state that a role term appropriate to the creator element can be used if the contribution is described in isolation, rather than complementing another work. This could be read as contradicting the requirement to record different role designations at each level. It needs to be made clearer that the access point has therefore been assigned at the work level. Perhaps it would be better to give only the first sentence of that instruction in this list, leaving any explanations to be given in the instructions.” John Attig said that ALA also had concerns about the scope at X.2.1.

Judy Kuhagen noted that LC had been asked to add these sentences at the December 2007 conference call. The Chair said that she thought that the extra text at X.2.1 was telling you the difference between a creator and a contributor, and if anywhere, this should be in the instructions. The JSC agreed to have only a caption at X.2.1.

**Action=LC**

#### 245.7.3 References between terms at different FRBR levels

The Chair said that ACOC understood why there were references from terms at one FRBR level to those at another (e.g., the reference in X.1.1 Speaker to the terms Storyteller, Narrator and Performer in X.2.1), but thought that it needed to be clear that you could not use terms at a different FRBR level. The JSC decided to retain the references, but make it clear that there was a change of FRBR level (e.g., For a compiler as a contributor, see Editor of compilation, X.2.1).

**Action=LC**

The Editor said that he did not agree with having a role of “Speaker” at X.1.1 as a speaker was expressing his or her own work as author. The JSC agreed that “Speaker” would move to the expression level (see also 5JSC/M/245.8.4, at “Performer”). The Editor said that the scope of any of the creator roles should not be limited to a particular form of expression.

**Action=LC**

#### 245.8 5JSC/LC/11/ALA response

##### 245.8.1 The JSC agreed to discuss first the specific comments in the ALA response.

##### 245.8.2 X.1.1 Roles used with creators

General comment on definitions in this section: The JSC agreed that “a work” would be used rather than “works”.

**Action=LC**

Artist: The JSC agreed to treat “Artist” as a broad category with “Sculptor” as a narrower term.

**Action=LC**

Author: Barbara Tillett said that LC would write up alternatives to the ALA suggestions for the wording of “librettist” and “lyricist”.

**Action=LC**

Composer: The JSC agreed with ALA that the wording should parallel the instruction at 6.17.1.3.1.

**Action=LC**

Inventor: The JSC discussed the ALA suggestion that “Designer” would be a more appropriate term. The JSC decided to include “Designer” in the list with the existing definition of “Inventor” and to include “Inventor” in the list with a new definition.

**Action=LC**

Interviewee and Interviewer: The JSC decided that both roles would be included at the creator level and in qualified form (or other artificial construct) at the contributor level.

**Action=LC**

Respondent: The JSC agreed to add this to the list at X.1.4, and to move “Praeses” to X.1.1.

**Action=LC**

Reviewer: The JSC decided not to add this term as it is covered by “Author”.

#### 245.8.3 X.1.4

Legal roles: The JSC agreed to add the following roles as suggested by ALA: Defendant, Plaintiff, Judge, Appellant, and Appellee.

**Action=LC**

Collector: Hugh Taylor noted that this role was already covered at the expression level under “Curator”. The JSC decided that “Curator” and its sub-roles belonged at the item level. The Editor commented that it had already been agreed to add an element for “Other person, family, or corporate body associated with an item” to chapter 22 (5JSC/M/244.20.1). John Attig said that he accepted that at the work level, “Compiler” could be used.

**Action=LC**

#### 245.8.4 X.2. Designation of role for expressions

Arranger of music: The JSC agreed to change the last sentence as suggested by ALA and modified by LC: “For extensive modification that results in a new musical work, see Composer (X.1.1).”.

**Action=LC**

Art director: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

Author of introduction, foreword, afterword, etc.: Barbara Tillett noted that it had been agreed at the 5 July 2007 conference call not to add these roles.

Choreographer of additional dance: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

Compilation editor: The JSC agreed to change this to “Editor of compilation”.

**Action=LC**

Composer of additional music: The JSC agreed to add “Composer of musical soundtrack” as a narrower term and asked ALA to provide a definition.

**Action=LC; ALA**

Composer of music for silent film and Composer of music for sound film: The JSC agreed to add these terms and asked ALA to provide definitions. Barbara Tillett noted that it needed to be clear how they differed from “Composer of musical soundtrack”.

**Action=LC; ALA**

Costume designer: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

Film editor: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

Hair stylist: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

Performer: The JSC decided that in the case of extemporaneous works this role would be covered by “Composer” or “Author”. Barbara Tillett said that “Speaker” would be included as a sub-type under “Performer” at the expression level.

**Action=LC**

Commentator [narrower term under Performer]: The JSC agreed to add this term and asked ALA to provide a definition. Barbara Tillett said that the definition needed to show how this role differed from “Narrator”.

**Action=LC; ALA**

Conductor [narrower term under Performer]: The JSC agreed with the ALA suggestion to delete “often through the means of gestures of the hands and arms”.

**Action=LC**

Host [narrower term under Performer]: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

Moderator [narrower term under Performer]: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

Presenter [narrower term under Performer]: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

Puppeteer [narrower term under Performer]: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

Lighting designer: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

Make-up artist: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

Musical director: The JSC agreed to add this term and asked ALA to provide a definition. Hugh Taylor noted that this was a role in theatrical productions as well as moving image resources.

**Action=LC; ALA**

Producer: The JSC discussed this term later in the meeting (see 5JSC/M/245.9.2).

Production designer: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

Restorer: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

Transcriber: The JSC agreed to add the first of the sentences suggested by ALA: “For a work “transcribed” for a different instrument or performing group, see Arranger of music.”.

**Action=LC**

Videorecording engineer: John Attig withdrew the ALA suggestion to add this term, as it is covered by “Recording engineer”.

Writer of added lyrics: The JSC agreed to the following wording: “A writer of words added to an expression of a musical work.”

**Action=LC**

#### 245.8.5 X.3. Designation of roles for manifestations

X.3.1, Producer: The JSC agreed to discuss this term later in the meeting (see 5JSC/M/253.31).

X.3.1, Book designer: The JSC agreed to add this term and asked ALA to provide a definition.

**Action=LC; ALA**

X.3.3: Barbara Tillett read out the ALA comment: “The inclusion of Film distributor raises obvious questions about the appropriate designator for distributors of non-film moving images, not to mention distributions of other types of resource.” Barbara Tillett said that there was already an element for “distributor”, and suggested that ALA propose any new terms (and definitions) thought necessary.

**Action=ALA**

#### 245.8.6 X.4. Designation of role for items

Honouree and Dedicattee: The JSC agreed to add these terms and asked ALA to provide definitions.

**Action=LC; ALA**

Inscriber: The JSC agree to add this role as proposed by ALA: “A person whose manuscript notes appear on an item.”

**Action=LC**

#### 245.9 5JSC/LC/11/ALA response – Addendum

245.9.1 John Attig explained that the addendum at the end of the ALA response (concerning roles for moving images) contained opinions that were not shared by everyone in ALA. He said that the main argument was that in the case of moving images creation of the expression and creation of the work are a single act. He added that this would lead to all roles being at the work level. John Attig explained that the view was that performance creates the work, which is different to what occurs in the case of operas, plays, etc, where you have a work and then perform it. The JSC discussed the issue, and it was noted that for the purposes of RDA some pragmatic decisions needed to be made about who is considered a collaborator at the work level.



245.9.2 The JSC discussed the suggestions in 5JSC/LC/11/CCC response for roles to be moved from the expression level to the work level. Margaret Stewart withdrew the suggestion to move “Compilation editor”. The JSC decided that “Cinematographer”, “Producer”, and “Production Company” would move to X.1.4 (other person, family, or corporate body associated with the work). The JSC agreed to move “Screenwriter” as a subcategory of “Author”. It was noted that it has been agreed previously to retain “Animator” at the expression level (5JSC/M/245.4.1).

**Action=LC**

245.9.3 In terms of the CCC comments on “Director”, the JSC decided that there would be a role for “Film director” at the work level, and other types of director (e.g., stage director) would be at the expression level. The JSC asked LC to consult internally regarding the terminology which would be used.

**Action=LC**

245.10 The Chair confirmed with John Attig that the remaining comments in the ALA addendum had been covered in the previous discussion. She also checked with the JSC that there were no further changes to the list of roles to discuss. The Chair noted that Line 118 in the December 2007 draft response table had been dealt with.

## **246 Constituency Review of June 2007 Draft of Chapters 6-7**

246.1 Received and considered the following documents:

5JSC/RDA/Part A/Chapters 6-7/Rev  
 5JSC/RDA/Part A/Chapters 6-7/Rev/LC response  
 5JSC/RDA/Part A/Chapters 6-7/Rev/BL response  
 5JSC/RDA/Part A/Chapters 6-7/Rev/Chair follow-up/1  
 5JSC/RDA/Part A/Chapters 6-7/Rev/ACOC response  
 5JSC/RDA/Part A/Chapters 6-7/Rev/CCC response  
 5JSC/RDA/Part A/Chapters 6-7/Rev/CILIP response  
 5JSC/RDA/Part A/Chapters 6-7/Rev/Chair follow-up/2  
 5JSC/RDA/Part A/Chapters 6-7/Rev/Chair follow-up/3  
 5JSC/RDA/Part A/Chapters 6-7/Rev/Chair follow-up/4  
 5JSC/RDA/Part A/Chapters 6-7/Rev/Chair follow-up/5  
 5JSC/RDA/Part A/Chapters 6-7/Rev/ALA response

246.2 The Chair explained that constituency comments on the former Part A, Chapter 6 would be discussed in the context of Section 6 (Chapters 18-22). She added that compiled comments could be found in two documents: “General comments on 5JSC/RDA/Part A/Chapters 6-7/Rev (updated April 2008)”; and, “Response table for revised chapters 6-7 (2007) - Chapter 6 - updated by Editor and ALA rep April 2008”. The minutes only contain details of those line numbers/topics on which there was substantive discussion, and/or which resulted in changes to the draft instructions. No comments remain to be discussed, except where indicated otherwise.

246.3 General comments on 5JSC/RDA/Part A/Chapters 6-7/Rev (updated April 2008)

246.3.1 Required access points

The Editor noted that currently the Creator was the only core element for Section 6. He added that this meant it would not be possible to meet the user task of finding all resources

associated with a person. The JSC agreed to discuss the core elements in detail after the meeting.

**Action=JSC**

- 246.4 Response table for revised chapters 6-7 (2007) - Chapter 6 - updated by Editor and ALA rep April 2008

- 246.4.1 Line 7: 6.1.1.2 Delete unnecessary wording: “If the statements appearing on the preferred source of information in the resource being described are ambiguous or insufficient, use the following sources of information”. (ACOC)

The JSC referred this editorial comment to the Editor.

**Action=Editor**

- 246.4.2 Line 8: 6.1.1.2: ALA recommends providing a definition of “prominently” either here or elsewhere in RDA. In addition, ALA recommends revising this instruction to clarify that a)– c) are in order of preference: “If the statements appearing on the preferred source of information in the resource being described are ambiguous or insufficient, use the following sources of information (in this order of preference):”

The JSC agreed that it should be clear that a)-c) are in order of preference, and asked the Editor to ensure that the wording is consistent with other instructions.

**Action=Editor**

- 246.4.3 Line 14: 6.1.3.0.1: ALA recommends adding a reference to 2.4.2, Change in statement of responsibility [Dec. 2005 draft]

The JSC referred this suggestion to the Editor.

**Action=Editor**

- 246.4.4 Line 66: 6.7.1.1: In order to be able to name the works covered by 6.7.1.1-6.7.1.4 when applying chapter 13, LC recommends removing 6.7.1.5-6.7.1.6 so that 6.7.1 can be labelled as “Required.” 6.7.1.5 and 6.7.1.6 could become a new 6.7.2 “Other persons and corporate bodies associated with laws, etc.” with the following instructions being renumbered.

The Editor noted that there was an issue in that none of the legal bodies that would be given main entry according to AACR2 (but which are not creators) were covered by the core elements. The JSC agreed to discuss the core elements in detail after the meeting.

**Action=JSC**

- 246.4.5 Line 85: 6.7.6.2.2: LC recommends deleting “named in the preferred source of information” to remove that limitation.

The Editor noted that this wording was now at 19.4.1.21.2. The JSC agreed to merge 19.4.1.21.1 and 19.4.1.21.2 to remove the requirement for the court reporter to be named in the preferred source.

**Action=Editor**

- 246.4.6 Line 87: 6.7.6.4: ALA recommends incorporating this instruction into 6.5.2.1, since publishers of legal resources should be treated as other publishers are treated. 6.7.6.4: LC recommends deleting this instruction. The situation is covered by 6.5.2.

It was noted that this instruction was now at 19.4.1.24. The Editor explained that this was the only case where the publisher was elevated to be associated with the work. The JSC decided to delete the instruction, and move one of the examples to 19.4.0.3.1. The Secretary confirmed that this was not an AACR2 change.

**Action=Editor; Examples Group 2**

- 246.4.7 Line 89: 6.7.7.1: Several instructions in 6.7.7 provide for an access point for the first named person or body, perhaps a remnant of earlier instructions for providing a primary access point. This limitation is inconsistent with the rest of the chapter and should be eliminated. The instruction should be to provide an access point for the person or body if considered important. The specific instructions are: 6.7.7.1.3; 6.7.7.1.4, 6.7.7.3.3; 6.7.7.3.4; 6.7.7.4.3; 6.7.7.4.4. (ALA). LC recommends removing the limitation of “first named” in these instructions. The examples would need to be adjusted. 6.7.7.1.3; 6.7.7.1.4; 6.7.7.3.3/6.7.7.3.4; 6.7.7.4.3; 6.7.7.4.4.

The JSC agreed to remove the limitation of “first named” from instructions in 19.4.1. The Editor said that he would also remove all limitations referring to the preferred source.

**Action=Editor; Secretary (List of AACR2 changes)**

- 246.4.8 Line 91: 6.7.7.1.4: It would be helpful also to give a reference to 6.7.7.6 for the access point for the judge. (LC)

The JSC referred this suggestion to the Editor.

**Action=Editor**

- 246.4.9 Line 98: 6.8.1.1.1. Ambiguous in the case of the Judaeo-Christian Bible? Would Daniel be included (much of the book of Daniel is third-person narrative)? Or Moses for the Pentateuch? Or David for the Psalms? Would anybody look up a book of the Bible by author, Isaiah? CILIP suggests deletion of this instruction (the Smith and/or Rodwell example(s) could be moved to the section of 6.4.1.1.1 covering translators, if additional examples are useful there).

Hugh Taylor noted that there was no longer a separate instruction, and the issue was your understanding of “creator”. The JSC asked Examples Group 2 to evaluate the following examples on p. 19-5 and 19-6: “Isaiah”, “Subhadra”, “Maimonides, Moses”.

**Action=Examples Group 2**

- 246.4.10 Line 102: 6.8.3.0.2, b): LC recommends removing the limitation “for congregations and choirs.” The audience for the resource is not pertinent.

The JSC agreed with the LC suggestion (instruction now at 19.4.2.1.4 b)).

**Action=Editor**

- 246.4.11 Line 105: 6.9.0.1: ALA recommends changing the instruction of 6.9.0.1a as follows: a) official communications by heads of state, heads of government, or heads of international bodies, governors of dependent or occupied territories, or other officials (e.g., a message to a legislature, a proclamation, an executive order other than one covered by 6.7.1).

The JSC agreed to add “heads of dependent or occupied territories” to 19.4.3.1.1 a). John Attig withdrew the suggestion to add “or other officials” because it is not appropriate as the instruction is limited to official communications at the highest level.

**Action=Editor**

**247 Draft of RDA – Section 5 – Chapter 17**

247.1 Received and considered the following document:  
5JSC/Editor/RDA/Section 5/Chapter 17

247.2 The Editor led a discussion on the issues raised in the cover letter for  
5JSC/Editor/RDA/Section 5/Chapter 17

247.2.1 17.1.2 Access point

The Editor noted that the explanations of the terms “access point” and “preferred access point” were derived from the explanations of those terms in the September 2007 draft of Part B, chapter 8, but had been modified to refer only to access points representing works and expressions (as access points representing manifestations and items had been eliminated).

247.2.2 17.2 Functional objectives and principles

The Editor explained that a placeholder for a second functional objective had been added at 17.2.1 to reflect the inclusion of primary relationships to manifestations and items in chapter 17. The JSC agreed to add: “find all items that exemplify a particular manifestation”.

**Action=Editor**

247.2.3 17.3 Required elements

The JSC agreed to discuss the core elements after the meeting.

**Action=JSC**

247.2.4 17.4.2 Conventions used to record primary relationships

The Editor noted that the instructions under 17.4.2 had been reworked to be consistent with the description of the conventions used to record relationships between works, expressions, manifestations, and items in chapter 24, as agreed at the October 2007 JSC meeting (5JSC/M/204.13.1).

The JSC decided to allow at 17.4 the possibility for the relationship between a work and a manifestation that embodies that work to be recorded without identifying the expression through which the work is realized (corresponding to instructions at 17.7 Manifestation of work and 17.8 Work manifested). It was acknowledged that this is not following the FRBR model, but it means that a “null” expression record would not have to be created.

**Action=Editor**

The JSC discussed the conventions used to record primary relationships, and agreed that it was important to cover both scenario 1 and scenario 2 implementations. The JSC decided that 17.4.2a (Identifier for the related work, expression, manifestation, or item) would be retained; 17.4.2.b (Preferred access point representing the related work or expression) would be split into two to cover works and expressions separately; and 17.4.2c (Description of the related work, expression, manifestation, or item) would have the concept of composite descriptions reinstated and adjusted. The Editor said that he would rework 17.4 and send it to the JSC for review.

**Action=Editor**

247.3 The Chair explained that constituency comments on the former Part A, Chapter 7, instruction 7.3 would be discussed in the context of Section 5, Chapter 17. She added that compiled comments could be found in two documents: “General comments on 5JSC/RDA/Part A/Chapters 6-7/Rev (updated April 2008)”; and, “Response table for revised chapters 6-7 (2007) - 7.3 - updated by Editor April 2008”. The minutes only contain details of those line numbers/topics on which there was substantive discussion, and/or which resulted in changes to the draft instructions. No comments remain to be discussed.

247.4 Response table for revised chapters 6-7 (2007) - 7.3 - updated by Editor April 2008

247.4.1 Line 132: 7.3.0.1.1 b) Delete unnecessary wording (ACOC)

The JSC agreed to the following wording at 17.4.1.1: “b) the relationship between an expression of a work and a manifestation that embodies that expression”.

**Action=Editor**

247.4.2 Line 132: 7.3.0.1.1: Consider rewording as follows: “Primary relationships exist between a work, expression, manifestation, and item and are implicit in the FRBR definitions of those entities.” We also suggest revising the bullets here with the exact phraseology used in FRBR (i.e., “A Work is realized through an Expression”, etc.) (ALA)

The Editor noted that the use of “exist” was not appropriate, as the relationships are inherent. John Attig said that he did not want to pursue the second part of the ALA comment.

## 248 Analysis of the proposed CONSER standard record vis à vis RDA

248.1 Received and considered the following documents:

5JSC/Editor/1

5JSC/Editor/1/Chair follow-up

248.2 The Chair noted that the object of the discussion was to see if there were any aspects of the CONSER standard record that it would be useful to incorporate in RDA. She added that there were only two issues relating to uniform titles remaining to be discussed (5JSC/M/204.15).

248.3 Recommendation 2a: Uniform titles for translations and language editions

248.3.1 The JSC agreed that there was no discrepancy to resolve as although RDA instructs on recording inherent relationships, it will not refer to either main entries or added entries.

248.4 Recommendation 2b: Uniform titles to distinguish identical titles. Other “collocating” uniform titles.

248.4.1 The JSC members agreed that there was nothing in the CONSER standard record recommendations that convinced them to change the RDA requirement to have elements that identify the work when recording the primary relationship.

248.4.2 During the discussion the JSC agreed to delete 6.0.1.5 “Apply the instructions in this chapter according to the policy of the agency creating the data” as it is a carry-over from AACR2 chapter 25. The JSC decided not to move this statement to the General Introduction as suggested by LC at Line 105 in the December 2007 draft response table.

**Action=Editor****249 Draft of RDA – Section 8 – Chapters 24-28**

- 249.1 Received and considered the following document:  
5JSC/Editor/RDA/Section 8
- 249.2 The Editor led a discussion of the issues raised in the cover letter of  
5JSC/Editor/RDA/Section 8.
- 249.3 24.1.2 Related work, expression, manifestation, and item
- 249.3.1 The Editor explained that the explanations of the terms “related work” and “related  
expression” reflected the possibility that the related work or expression may be recorded  
within a description, not just within an access point control record.
- 249.4 24.1.3 Access point
- 249.4.1 The Editor noted that the explanations of the terms “access point” and “preferred access  
point” were derived from the explanations of those terms in the September 2007 draft of  
Part B, chapter 8, but had been modified to refer only to access points representing works  
and expressions (as access points representing manifestations and items had been  
eliminated).
- 249.5 24.3 Required elements
- 249.5.1 The JSC agreed to revisit the issue of core elements after the meeting.  
**Action=JSC**
- 249.6 24.4 Recording relationships between works, expressions, manifestations, and items
- 249.6.1 The JSC decided to expand 24.4c to include descriptions of works and expressions.  
**Action=Editor**
- 249.6.2 The Editor explained that instructions had been added at 24.4.3-24.4.5 as suggested by  
ACOC and agreed at the October 2007 JSC meeting (see 5JSC/M/204.14.2). The JSC  
decided that the instructions at 24.4.3-24.4.5 and 24.4c.2 were not suitable for inclusion in  
RDA and should be deleted. It was noted that they could be included in a workflow.  
**Action=Editor; Secretary (Reminders for Workflows)**
- 249.6.3 The JSC asked the Glossary Editor to provide a Glossary definition for “unstructured  
description”. The Editor commented that this should match the parenthetical at 24.4c.1 b).  
**Action=Glossary Editor**
- 249.7 24.5.0.3 Recording relationship designators
- 249.7.1 The Editor noted that the alternative at 24.5.0.3.2 to use another standard list would be  
replaced by a statement in the General Introduction (5JSC/M/240.3.1).  
**Action=Editor**
- 249.8 25.1.0.3 Referencing related works

- 249.8.1 The Editor explained that in the two examples on page 25-4 illustrating parts of series, the numbering of the part within the series has been deleted. He asked if this was the intended result of the discussion of that issue at the February 13/14 teleconference on group 1 relationships. He noted that the number was an attribute of the relationship, but there was currently nowhere to put this information. The JSC discussed the issue and agreed that it was important to have somewhere to record this information. The Editor said that he would add an element to chapter 24 for “Numbering of issue or part”. He noted that this would not be limited to any one type of relationship (see also 5JSC/M/258.3.4)  
**Action=Editor**
- 249.8.2 It was noted that the example “*Originally issued in series: Occasional papers of the Museum of Natural History, the University of Kansas*” may need to be moved elsewhere or changed as it shows two relationships, between the electronic text and the printed volume, and between the printed volume and the series.  
**Action=Examples Group 2**
- 249.9 27.1.0.3 Referencing related manifestations
- 249.9.1 The Editor noted that the first five examples on page 27-3 under the subheading “Structured description of the related manifestation” were originally constructed to illustrate preferred access points representing manifestations, and needed to be reworked to illustrate descriptions of the related manifestations.  
**Action=Examples Group 2**
- 249.9.2 The Editor asked if the optional addition at 27.1.0.3.2 was necessary. He suggested that it was covered under the general instruction on providing a full or partial structured description of the related resource. The JSC agreed to delete the instruction.  
**Action=Editor**
- 249.10 27.2 Explanation of relationship
- 249.10.1 The Editor suggested that the instruction was not necessary as there were no longer instructions on preferred access points for manifestations. The JSC agreed.  
**Action=Editor**
- 249.11 28.2 Explanation of relationship
- 249.11.1 The Editor suggested that the instruction was not necessary as there were no longer instructions on preferred access points for items. The JSC agreed.  
**Action=Editor**
- 249.12 Examples
- 249.12.1 The JSC agreed with the Editor that all the examples in chapters 24-28 will need to be reviewed and revised as necessary to illustrate the preferred access point constructed according to instructions in section 3, chapters 9-11. The examples will also have to be reviewed for consistency with appendix B after final decisions are made on the use of abbreviations.  
**Action=Examples Group 2**
- 249.12.2 The Editor said that a decision needed to be made on the appropriateness of displaying an introductory phrase (in italics) indicating the type of relationship in examples illustrating the use of a preferred access point or structured description for the related resource. The

JSC agreed that this would be explained in the General Introduction. The JSC asked Examples Group 2 to ensure that the introductory phrases were aligned with the relationship designators in Appendix J.

**Action=Editor; Examples Group 2**

## 250 Designation of Relationship in RDA

- 250.1 Received and considered the following document:  
5JSC/Restricted/ALA Rep/Rev/2
- 250.2 John Attig led a discussion of the issues raised in the cover letter for Appendix J (5JSC/Restricted/ALA Rep/Rev/2). He noted that there were only four elements for relationships in section 8 (related work, related expression, related manifestation, related item), and that all other relationships were in the appendix.
- 250.3 John Attig explained that as each designation of relationship must function as an element sub-type of one (and only one) of the relationships defined in Section 8 he had added qualifiers “(work)” and “(expression)” in some cases. The Editor noted that the qualifiers would not need to be displayed.
- 250.4 John Attig said that he thought there was a choice between defining the relationship and defining the related entity, and that he had defined the related entity, using language such as “A work that ...” in the definitions. The JSC agreed with this approach.
- 250.5 John Attig said that he had not been specific about the entity referred from, and had usually just referred to it as the “entity”, e.g., “A work used as the basis for a derivative entity”. The JSC agreed with this approach.
- 250.6 John Attig explained that in the definitions for designators for related expressions and for related items, he had included a sentence such as “Use only when the succeeding entity is a particular expression of a work, e.g., a particular edition.” He asked if this was a valid approach. The Editor suggested that instead a general note could be made at J.2.0. The JSC agreed.  
**Action=ALA representative**
- 250.7 John Attig commented that he had used the indefinite article throughout the definitions. The Editor noted that this matched the Editor’s Guide.
- 250.8 John Attig said that as requested he had clarified the distinction between sequential and derivative relationships. Barbara Tillett suggested that in phrases such as “treat these as derivative works”, that “those” or “them” be used instead. The JSC agreed.  
**Action=ALA representative**
- 250.9 John Attig noted that he still had references to access points for manifestations and items in the Appendix. The JSC agreed that these should be removed. The Editor said that he thought that too much text from the instructions was repeated in the Appendix. John Attig said that he would use captions where possible.  
**Action=ALA representative**
- 250.10 John Attig said that he thought that the relationship to the describing entity would always be a subject relationship, and for this reason, he had deleted some designators under Descriptive work relationships and Descriptive expression relationships. The JSC decided that both sides of the relationship should be left in until there was a better understanding



of the FRBR subject relationships. John Attig said that he would do the same in comparable situations.

**Action=ALA representative**

250.11 John Attig said that in general, he had tried to eliminate designators that would not be appropriate to the related entity in question. For example, *Bound with* would not be appropriate for a Related manifestation nor *Issued with* for a Related item.

250.12 John Attig explained that in the cover letter he had made some comments on the examples in 5JSC/Editor/RDA/Section 8. He noted that many of the captions on the examples in the draft chapters were more specific than what was in the Appendix, e.g., “German translation of ...”. The Editor noted that there was nowhere in RDA that covered the MARC 21 76X-78X \$i (Display text). The Chair asked the ALA rep to raise this in the next draft of Appendix J.

**Action=ALA representative**

250.13 John Attig asked if the Appendix should include “see” references for synonyms. The Chair suggested that a decision be made once the JSC had seen the proposed alphabetical list of designators.

250.14 The Chair noted that there were some line numbers in the document “Response table for revised chapters 6-7 (2007) - Chapter 7 - updated by Editor and ALA rep April 2008” that were marked for discussion with Appendix J.

250.14.1 Line 149: 7.4.0.1: The wording of this instruction implies that an equivalence relationship can exist between a manifestation and a specific item that exemplifies that same manifestation. Such a relationship would be a primary, not an equivalence relationship. Reword instruction to clarify that such an equivalence relationship is between a manifestation and an item exemplifying a different manifestation (ALA).

John Attig said that he had done his best to make this clear.

250.14.2 Line 152: The scope “an equivalent item is a specific item reproduced by the resource being described” is difficult to understand on its own. The wording at 7.4.0.1.1 i.e., “between a manifestation and the specific item reproduced by that manifestation” conveys this concept more clearly. We would like the JSC to explore alternatives for wording the scope note. (ACOC)

John Attig said that he would follow the ACOC suggestion in the next version of the Appendix.

**Action=ALA representative**

250.14.3 Line 158: 7.5.1.0.2: LC recommends including “musical arrangements” here instead of in the first part of 7.5.1.0.2 because these arrangements are generally based on works, not on expressions. (They are expressions.). Line 159: 7.5.1.0.3: Based on its comment for 7.5.1.0.2, LC recommends deleting “musical arrangements” from the second and third lines and adding “musical arrangements” in the list at the end of the sentence.

John Attig said that he would make the relevant changes in the Appendix.

**Action=ALA representative**

250.14.4 Line 170: The definition of “A whole work (or expression)” is awkward. "A whole work (or expression) is a larger work (or expression) that includes the work (or expression)

embodied in the resource being described." Consider also replacing "larger" with "complete or entire". (ACOC)

John Attig said that he would make the change. (Note: during discussion of 5JSC/M/251.2 it was agreed that the ACOC comment had already been addressed in the Appendix.)

**Action=ALA representative**

250.14.5 Line 179: Norway: 7.7.3.0.2 mentions the term "multipart resources". We would like a further definition or explanation of this term (more than 7.7.4.0.2). This might also further explain which paragraph to apply to "colliding" relationships. Example: Textbook material. It is sometimes difficult to establish whether such resources are part of a "whole-part relationship" or an "accompanying relationship".

Barbara Tillett said that this was a misunderstanding and there were two relationships involved: the whole-part relationship between the whole and a part and an accompanying relationship between one part and another (part-to-part).

250.14.6 Line 180: 7.7.4.0.2: It would be helpful to add "issues of a serial" to this subsection. (ALA)

The JSC decided not to add this.

250.15 The Chair said that there were possibly some issues in the document "General comments on 5JSC/RDA/Part A/Chapters 6-7/Rev (updated April 2008)" that were relevant to Appendix J.

250.15.1 John Attig noted this comment in the document: ALA: "7.8.0.1.2: Part-to-part relationships are mentioned in the context of both accompanying relationships and of sequential relationships (at 7.9.0.1.2). The status of the part-to-part relationship is unclear. One of Tillett's major points is that the relationships in the taxonomy must be mutually exclusive and exhaustive. To say that there is yet another (unlisted?) part-to-part relationship, and that this relationship can be either an accompanying or a sequential relationship, implies that the relationships defined in RDA are neither mutually exclusive, nor exhaustive. The language about the relationship between parts needs to be handled more carefully if it is to be retained. On the other hand, there does exist a relationship between the parts in a whole-part relationship. This relationship between parts is an accompanying relationship unless the parts are numbered, in which case it is a sequential relationship. If RDA does refer to the relationship between parts, this distinction should be explicit."

The JSC decided not to have a separate category for "part-to-part" relationships in the Appendix.

250.15.2 ALA comment: "7.8.0.2: The accompanying relationship will always be a work-to-work relationship. RDA needs to find a way to acknowledge this in the scope instructions."

John Attig explained that this was not true and that there were accompanying relationships at all levels in the Appendix.

250.15.3 ALA comment: "Some ALA reviewers had problems with the term "augmenting" work. To the extent that "augment" is commonly defined as "to make something greater in size, extent, or quantity," it would be difficult to assign this term to indexes, catalogs, and perhaps concordances."

John Attig said that he did not want to pursue the ALA comment.

## 251 Constituency Review of June 2007 Draft of Chapters 6-7 (continued)

251.1 The Chair explained that constituency comments on the former Part A, Chapter 7 would be discussed in the context of Section 8. She added that compiled comments could be found in two documents: “General comments on 5JSC/RDA/Part A/Chapters 6-7/Rev (updated April 2008)”; and, “Response table for revised chapters 6-7 (2007) - Chapter 7 - updated by Editor and ALA rep April 2008”. The minutes only contain details of those line numbers/topics on which there was substantive discussion, and/or which resulted in changes to the draft instructions. No comments remain to be discussed.

251.2 Response table for revised chapters 6-7 (2007) - Chapter 7 - updated by Editor and ALA rep April 2008

251.2.1 Line 110: 7.0.2 (Consistency –FRBR) Should the following sentence be revised to refer to include the FRBR concept? "The elements enable catalogue users to navigate to related resources that may be relevant to their needs." (ACOC)

The Editor said that he would bring this part of chapter 24 in line with what had been agreed during the discussion on the General Introduction (M/225.11.10).

**Action=Editor**

251.2.2 Line 111: 7.0.3 (Consistency). Give the following sentence in a separate bullet (paralleling the equivalent chapter 6 instruction): "Guidelines and instructions on formulating access points for use in naming a related work, expression, manifestation, or item are covered in chapter 13." (ACOC)

The JSC referred this comment to the Editor.

**Action=Editor**

251.2.3 Line 118: 7.1.4.0.1, examples, Related expression: It should be noted for the record that “Goncourt, Edmond de. Frères Zenganno. English” does not in fact identify a “particular expression of a work”. It is a collective name for all the English-language expressions. This is a matter to be discussed in connection with Chapter 13, but we would hope that what is required in Chapter 7 will in fact be supported in Chapter 13 (or vice versa). (ALA)

The Chair noted that ALA's point now related to the new 6.1.3.1. The Editor said that he would see if he could remove “particular”.

**Action=Editor**

251.2.4 Line 119: 7.1.5.0.1: Why is “either” included in the guideline? All other instances of this format seem to use only “or”. [editorial] (ALA)

The Editor said that when there were only two options he used “either/or”, but for more than this he used “or”. The Editor explained that there were issues with display of “or” lists in the online product. He said that he was trying to build something into the relevant introductory paragraphs so that there was no need for the “either/or” construction. The JSC agreed with this approach.

251.2.5 Line 120: Prefer that these instructions referred to descriptions without further specifying structured or unstructured descriptions. 7.1.5.1 If this instruction is retained, clarification

of “the same structure” would be helpful, for example: "Provide a full or partial description of the related resource using the same structure (i.e., the same elements in the same order) that is used for the resource being described" (ACOC)

The Editor explained that the distinction between structured and unstructured descriptions paralleled the difference in MARC 21 between structured fields such as 76X-78X and 533/534 and note fields. The Chair withdrew the first ACOC comment. The JSC agreed with including the explanation of “the same structure” at 24.4c.1a).

**Action=Editor**

- 251.2.6 Line 125: We would like to see RDA’s treatment of the recording and designation of relationships (as well as its treatment of roles) contain more guidance about the value of such information in particular situations, rather than simply being an undifferentiated “option.” (ALA)

John Attig commented that this was the sort of thing that would be taken care of in a Workflow. The Editor noted that it also fell into the realm of implementation/policy decisions.

**Action=Secretary (Reminders for Workflows; List of implementation issues)**

- 251.2.7 Line 127: 7.2.0.2: ALA is not convinced that all terms taken from sources other than appendix X need to have their source explicitly identified.

The Editor said that if another controlled list were used, in order to follow RDF the list would need to be identified. He added that this instruction would be covered in the General Introduction.

**Action=Editor**

- 251.2.8 Line 128: 7.2.0: The use of “term(s)” should be unnecessary, not only because “term” can cover multiple instances of the element, but also because only one relationship should obtain between the resource and a given related entity. (ALA)

The JSC agreed that 24.5.0.3.1 would be changed to read, “Record an appropriate term ...”. All relationships are mutually exclusive.

**Action=Editor**

- 251.2.9 Line 129: France: There is a type of relationship that RDA Chapter 7 not mentioned: “generative relationships” which are particularly important for cinematographic and audiovisual works.

Barbara Tillett suggested that these could be covered as a type under derivative relationships in Appendix J. John Attig said that he would look into this.

**Action=ALA representative**

- 251.2.10 Line 130: It is not clear how resources that are related through having previously been part of the same collection are to be handled in RDA (ACOC)

The Editor said that the collection is an aggregate item in a whole/part relationship. He suggested that a link would be made to the collection as if it still existed. He added that this would be done as part of an informal unstructured description.

- 251.2.11 Line 164: 7.6.1.1: LC recommends adding a fourth possible convention “Subject access point to name the described entity” as 7.6.1.1.1d.1.

The Chair noted that it had previously been agreed not to include this.

- 251.2.12 Line 195: 7.9.0.2.2: The word “following” is used in two different senses: “according to” and “succeeding”. We suggest rewording as follows: “Record the relationship between the resource being described and the succeeding resource according to the guidelines given under 7.9.2.” (ALA)

The Editor confirmed the decision made earlier in the meeting that “following” would be changed to “applying” (5JSC/M/227.15.8).

**Action=Editor**

- 251.2.13 Line 196: 7.9.1.0 It may be helpful to add the term “prequel” to the scope of this section [Preceding work (or expression)], given the popularity of this term in literature, music, films and games. (ACOC)

John Attig noted that prequels were covered with Sequential work relationships in Appendix J. The Editor added that a prequel preceded the other work in terms of content.

- 251.3 General comments on 5JSC/RDA/Part A/Chapters 6-7/Rev (updated April 2008)

- 251.3.1 The JSC looked at the remaining general comments and agreed that they were all either moot, or withdrawn, or covered.

## 252 Draft of RDA - Section 1 – Chapter 1

- 252.1 Received and considered the following document:  
5JSC/Editor/RDA/Section 1/Chapter 1

- 252.2 The Editor led a discussion on the issues listed in the cover letter of 5JSC/Editor/RDA/Section 1/Chapter 1.

- 252.3 1.7.1.1 Capitalization of titles

- 252.3.1 The Editor suggested that the instruction be discussed in the context of the Appendices Group revisions (see 5JSC/M/258.4).

- 252.4 1.7.2 Punctuation

- 252.4.1 The Editor asked whether the decision made at the October 2007 JSC meeting (5JSC/M/196.10.1-196.10.2) to transcribe ellipses as they appear on the source would also apply to square brackets. The JSC agreed. The Editor said that this meant it would not be possible to tell the difference between the ellipses and square brackets supplied by the cataloguer and those on the source. Hugh Taylor noted that in the case of those supplied by the cataloguer there might be an annotation, particularly in the case of omissions. John Attig said that this was one case where cataloguing of rare materials would differ, but that no change was requested to the instructions.

**Action=Editor**

- 252.4.2 The Editor asked whether the decision made for chapter 3 to have a general instruction that punctuation may be used within an element for clarity (5JSC/M/205.3.1), would also apply to transcribed elements. The JSC asked the Editor to add an instruction to 1.7.

**Action=Editor**

- 252.5 1.7.7 Abbreviations
- 252.5.1 The JSC agreed to discuss this instruction later in the meeting (see 5JSC/M/258.5).
- 252.6 1.8.3 Inclusive numbers
- 252.6.1 The JSC discussed whether to retain the wording at 1.8.3.1: “Consider inclusive dates and other inclusive numbers to be a single unit; record them in full.” The Editor noted that the instructions in 1.8 applied to recorded elements. The JSC agreed to the following wording “When recording inclusive dates and other inclusive numbers record both the first and the last number in full.”  
**Action=Editor**
- 252.7 The Editor led a discussion on the “Comments on Draft of RDA – Section 1 – Chapter 1” compiled from JSC representative comments.
- 252.8 1.2.1 c): ACOC: ‘format’ may need to be defined.
- 252.8.1 The JSC decided to remove “format” and reword 1.2.1 c): “*select* a resource that is appropriate to the user’s requirements with respect to the physical characteristics of the carrier, etc.”  
**Action=Editor**
- 252.9 1.2.7: ACOC suggested rewording: “Common usage. Data that is not transcribed from the resource itself should be recorded in terms that reflect common usage.”
- 252.9.1 The JSC referred the change to the Editor and asked him to ensure that the wording at 1.2.7 and 0.5 is consistent.  
**Action=Editor**
- 252.10 1.6 (Changes requiring a new description)
- 252.10.1 The JSC agreed to discuss this comment later in the meeting (5JSC/M/256).
- 252.11 1.6.2: ACOC: The term ‘re-based’ needs a definition, or alternatively examples in parenthesis.
- 252.11.1 The JSC agreed that if the term is used in RDA it will need a definition or examples in parenthesis.  
**Action=Glossary Editor**
- 252.12 1.7.2 (Punctuation)
- 252.12.1 The JSC agreed that the LC comment had been covered during the discussion on the cover letter (5JSC/M/252.4.2).
- 252.13 1.7.8: ACOC: Should this instruction include a reference, either directly to the instruction on variant titles (2.3.7.1.2 e), or perhaps a more general reference?
- 252.13.1 The JSC agreed that an instruction such as that suggested by the ACOC rep should be added: “When the inaccuracy, etc. is in the title, record a variant title if it is considered to be important for identification or access (see 2.3.7).” The Chair asked the Editor to check

that there were no other situations besides the title which should be included in the reference.

**Action=Editor**

## 253 Draft of RDA - Section 1 – Chapter 2

253.1 Received and considered the following document:  
5JSC/Editor/RDA/ Section 1/Chapter 2

253.2 The Editor led a discussion on the issues listed in the cover letter of  
5JSC/Editor/RDA/Section 1/Chapter 2

253.3 Abbreviations

253.3.1 The JSC agreed to discuss this issue later in the meeting (see 5JSC/M/258.5).

253.4 Use of square brackets

253.4.1 The Editor explained that the instruction at 2.2.3.4 specified that information in transcribed elements that has been taken from a source outside the resource itself should be indicated “either by means of an annotation or by some other means (e.g., through coding or the use of square brackets).” However, there are numerous instructions throughout chapter 2 that specify the use of square brackets when an entire element or sub-element is being supplied from a source outside the resource itself. Margaret Stewart noted that at the MARBI discussion in January 2008, the question was raised “What does the JSC want to display to users?” and that it had been said that using a code is no different from using square brackets.

253.4.2 The JSC decided to include “to supply” in 2.2.3.4: “If information taken from a source outside the resource itself is used to supply any of the following elements ...”. The JSC agreed to retain the reference to coding. The JSC asked the Editor to replace text on the use of square brackets for supplied elements with a reference to 2.2.3. It was agreed that the examples in RDA will show square brackets.

**Action=Editor**

253.4.3 The Editor said that at the at the October 2007 meeting that it had been agreed there would be no interpolations in transcribed elements (see 5JSC/M/205.7.1). However, there are still a number of instructions in chapter 2 that do specify adding or correcting data within a transcribed element and in all those cases, the instructions specify enclosing the supplied or corrected data in square brackets. The JSC decided not to change the individual instructions as the specified practices are useful. It was noted that as far as possible use of interpolations had been removed from RDA, but that those instructions that remained would specify use of square brackets. The Secretary confirmed with the JSC that overall there was a change from AACR2 and that square brackets would be used much less than previously.

**Action=Secretary (List of AACR2 changes)**

253.5 Hyphens versus dashes

253.5.1 It was noted that the decision had already been made to use hyphens (5JSC/M/239.4.1).  
**Action=Editor; Secretary (List of AACR2 changes)**

253.6 2.3.3 Alternative title

- 253.6.1 The JSC agreed to discuss this instruction later in the meeting (see 5JSC/M/253.36).
- 253.7 2.3.5.3 Recording other title information
- 253.7.1 The Editor explained that the exception for serials and integrating resources at 2.3.5.3.2 specifies that other title information is to be recorded only if it is considered important for identification or access. He asked if the exception was necessary for an element that is designated as optional and suggested that it would be more appropriate to delete the exception and leave it to policy manuals to specify when not to record other title information. The JSC agreed to delete 2.3.5.3.2. The Editor said that he would try to reword 2.3.5.3.3 to remove the “do not”.
- Action=Editor**
- 253.8 2.3.7.3 Recording variant titles
- 253.8.1 The Editor noted that the instruction at 2.3.7.3.2 specified indicating the source of the variant title and that technically speaking, such data would fall outside the scope of the variant title element per se. The Editor asked if the scope of the instructions under 2.18.1.3 should be extended to cover annotations on the source of a variant title. The JSC agreed.
- Action=Editor**
- 253.9 2.3.8.3 Recording earlier variant titles/2.3.9.3 Recording later variant titles
- 253.9.1 The Editor said that the instructions at 2.3.8.3.3 and 2.3.9.3.3 specified indicating the numbering or publication dates to which the change in title applies, and that technically speaking, such data would fall outside the scope of the earlier and later variant title elements per se. He asked if the instructions and examples at 2.3.8.3.3 and 2.3.9.3.3 should be revised and transferred to 2.18.1.4. He added that the examples under 2.3.8.4-2.3.8.9 and 2.3.9.4-2.3.9.9 would also need to be revised. The JSC agreed.
- Action=Editor; Examples Group 1**
- 253.10 2.5.0.2 Sources of information [edition statement]
- 253.10.1 The JSC agreed to discuss this instruction later in the meeting (see 5JSC/M/253.20.1).
- 253.11 2.5.1.1 Scope [designation of edition]
- 253.11.1 The Editor explained the scope note on designation of edition at 2.5.1.1.3 had been revised, as agreed at the October 2007 JSC meeting, to omit references to “version” as a term designating edition. He asked what should happen to the examples in 2.5 that still used “version”. John Attig noted that version did not always mean edition, but it did in these cases. The JSC decided to keep the examples.
- 253.11.2 The Editor asked if it was acceptable to retain the term “version” in the scope note at 2.5.0.1.4 (where it applies only to resources in an unpublished form). The JSC agreed this was acceptable.
- 253.12 2.7.0.1 Scope [production statement]
- 253.12.1 The JSC agreed to discuss this instruction later in the meeting (see 5JSC/M/253.31).
- 253.13 2.7.0.4 Recording production statements/2.8.0.4 Recording publication statements/2.9.0.4 Recording distribution statements



- 253.13.1 The JSC decided to remove the following sentence from the optional omission for levels in a corporate hierarchy: “Use a mark of omission (...) to indicate such an omission.” This will make the instruction consistent with omissions from statements of responsibility.  
**Action=Editor**
- 253.14 2.7.0.5 Recording changes in production statements/2.8.0.5 Recording changes in publication statements/2.9.0.5 Recording changes in distribution statements
- 253.14.1 The Editor noted that at the October 2007 meeting the JSC had decided “to record another statement when there are changes over time, with the option to provide an annotation” (see 5JSC/M/198.32.2). He asked if the intent of that decision was to record a second or subsequent occurrence of the production statement, publication statement, or distribution statement as a whole, not just the particular sub-element (place of production, producer’s name, etc.) that had changed. The JSC confirmed that there would be a completely new statement when information changed.  
**Action=Editor**
- 253.14.2 The Editor asked if the date in the earlier statement should be “closed” to indicate that the statement applies only to issues or parts issued up to a certain date. The JSC agreed.  
**Action=Editor**
- 253.14.3 The Editor suggested that decision to transfer the instructions currently under 2.7.0.5, 2.8.0.5, and 2.9.0.5 to the sections on the individual sub-elements (see 5JSC/M/198.31.1) needed to be reconsidered. He added that if a second or subsequent occurrence of the production statement, publication statement, or distribution statement as a whole is to be recorded, then the instructions on when and how that is to be done need to remain with the basic instructions on recording the statement. The JSC agreed. The Editor said that cross-references would be added under the instructions for the sub-elements within the statement linking back to the instructions under 2.7.0.5, 2.8.0.5, and 2.9.0.5.  
**Action=Editor**
- 253.15 2.7.5.3 Recording date of production/2.8.5.3 Recording date of publication/2.9.5.3 Recording date of distribution
- 253.15.1 The JSC agreed to discuss this instruction later in the meeting (see 5JSC/M/253.32).
- 253.16 2.7.5.6 Date of production not identified in the resource/2.8.5.6 Date of publication not identified in the resource/2.9.5.6 Date of distribution not identified in the resource
- 253.16.1 The Chair noted that the JSC had held discussions outside the meeting about how to record uncertain dates.
- 253.16.2 The JSC confirmed the earlier decision to use “s” to indicate probable decades or centuries, e.g., “1970s”. It was noted that this information was not intended to be machine manipulated, and the aim was comprehension by the user.
- 253.16.3 The JSC agreed that there would be a new instruction to cover a probable range of centuries.  
**Action=Editor**
- 253.16.4 The JSC decided that 2.X.5.6j Latest possible date certain would be extended to include earliest possible dates (e.g., “not before 1910”).  
**Action=Editor**

253.16.5 The Editor noted that it was necessary for him to use square brackets in the instruction to show that there was a variable involved, e.g., “[first year of the decade]s”. The Chair said that in an email to the Editor she had presented some alternatives for avoiding this construction. The Editor asked the Chair to resend him the email.

**Action=Chair**

253.17 2.14.0.4 Recording resource identifiers

253.17.1 The Editor noted that the instruction at 2.14.0.4.2 specifies using abbreviations as instructed in Appendix B. The JSC agreed to discuss this instruction with Appendix B (see 5JSC/M/258.3.1).

253.17.2 The Secretary noted that the CILIP representative had an action from the October 2007 meeting to investigate the format specified in the ISBN and ISSN standards (5JSC/M/198.25.1). Hugh Taylor said that he had consulted the ISBN user’s manual, which did not tell you how to record an ISBN, but rather how to display it. He added that the ISSN manual had similar instructions. It was noted that this display format did not match the way that these numbers are recorded in MARC 21 records. The Editor explained that the alternative would be to instruct to record these numbers as they appear on the source. Hugh Taylor commented that in theory this would match the display format. Barbara Tillett suggested that in the following sentence “format” be changed to “display format”: “If the resource identifier is one for which there is a prescribed format (e.g., ISBN, ISSN, URN), record it in accordance with that format.” The JSC agreed. The Editor noted that any instructions in the encoding format (e.g., MARC 21) would override what was in RDA. Margaret Stewart noted that this was no different to what currently happens with AACR2.

**Action=Editor**

253.18 2.18.6.3 Details relating to publication statement

253.18.1 The JSC agreed to discuss this instruction later in the meeting with line 311 in the chapter 2 wiki (5JSC/M/253.21.1).

253.19 The Chair led a discussion on the “Extract from wiki Chapter 2 January 2008”. Note: the line numbers are from the response table for the December 2005 draft of Part I of RDA.

253.20 2.5.0 Basic instructions on recording edition information. 2.5.0.2 Sources of information

253.20.1 Line 269: Add new 2<sup>nd</sup> para (ALA)

John Attig said that he had gone back to the original ALA comment, which was about what to do when edition information is present on both the title page and the colophon (not unusual with Chinese and Japanese single part monographs). The Editor noted that 2.5.1.2.1 on sources of information contained an order of preference, and that if there were a conflict you would only record the edition statement on the first source. Barbara Tillett suggested that there could be a note such as “Colophon edition information varies”. The Editor said that he would open up 2.18.3 “Annotation on edition statement” to allow for this situation.

**Action=Editor**

253.21 2.7.0.5 More than one publisher, distributor, etc.

- 253.21.1 Line 311: “Generalize option to cover when two bodies are named but functions not explicit” (CILIP)

The Editor noted that there was a related query by CCC in the wiki “For published resources, would a statement such as "Published for McGill University" be recorded as per 2.8.3.4 since McGill University does not fall into producer, publisher or distributor or should it be at 2.18.6.3?” The JSC agreed that statements naming more than one body and statements such as "Published for McGill University" were covered by 2.8.3.4.1. Hugh Taylor suggested that “Published by” was not necessary in this example: “Published by SAGE Publications on behalf of McGill University”. The JSC agreed.

**Action=Examples Group 1**

- 253.22 2.8.4 Place of production 2.8.4.1 Definition

- 253.22.1 Line 336: Make more explicit

John Attig said that the deletion of "creation" at 2.7.0.1.2, as agreed at the October meeting (5JSC/M/198.18.3) was adequate to address the ALA comment.

The Chair asked whether “or to the production of an unpublished resource.” should be added to the end of 2.7.0.1.2 as suggested in the wiki. The Editor noted that existing text already covered both published and unpublished resources: “Production statements include statements relating to the inscription, fabrication, construction, and/or manufacture (printing, duplicating, casting, etc.) of a resource”. The JSC agreed that there would be no change.

Margaret Stewart noted that DACS, RAD, and CCO did not require “production” statements except for date (covered at 2.7.5.7). However, the footnote 8 at 2.7 said: “A production statement is required only if a publisher’s name or distributor’s name is not applicable or not identified, and/or if a date of publication or date of distribution is not applicable or not identified. Place of production is optional.” The Editor suggested that the footnote be changed to make it clear that only the date is required for unpublished resources. The JSC agreed (see also 5JSC/M/253.31).

**Action=Editor**

- 253.23 2.9 Date of publication, distribution, etc.

- 253.23.1 Line 358: Need guidance for when there are multiple dates (CILIP)

The JSC discussed whether an instruction should be added to 2.8.5.2 to say that when there is more than one date for the same function on the source only the latest should be recorded. It was noted that this would be adding something that is not in AACR2. The JSC decided that no change was necessary.

- 253.24 2.12.2.2 Two or more resource identifiers

- 253.24.1 Line 432: Option: Query change from dash to hyphen (ALA); Option: Use dash instead of hyphen (CCC)

The Editor noted that this had already been resolved (5JSC/M/239.4.1).

- 253.25 The Editor led a discussion on the “Comments on Draft of RDA – Section 1 – Chapter 2” compiled from JSC representative comments.

## 253.26 2.0.3 Purpose and scope

## 253.26.1 ACOC: Suggested re-wording of first sentence

The Chair said that there was no need to discuss this editorial comment.

## 253.26.2 ACOC: Should the titles of chs 3 and 4 be given here – is there a standard style for references to other chapters?

The JSC agreed that it would be useful to include the name of the chapter, and asked the Editor to choose the best way to do this.

**Action=Editor**

## 253.26.3 ACOC: Are these additional elements also required?

The Editor said that the elements in chapters 3 and 4 were not also required.

## 253.27 2.3.0.4 examples ACOC: A number of the examples in Chapter 2 do not follow the guidelines on examples given in 5JSC/Chair/1/Rev/3

## 253.27.1 The Editor explained that as this was a broad general instruction, it required examples illustrating a number of specific instructions. The JSC asked the Examples Group to add explanatory text to the following examples:

The world of television; Hierarchy in organizations (examples of entering a title under a misspelt word)

new translations, interpretive notes, backgrounds, commentaries; an encyclopedia of domestic architectural detail (examples of other title information)

**Action=Examples Group 1**

## 253.27.2 The JSC decided that the following examples should be deleted as they are designations of edition followed by the title: Tenth anniversary edition of Economic justice for all; Sunday school edition of New songs of the gospel.

**Action=Examples Group 1**

## 253.28 Series access point

## 253.28.1 The Editor said that he thought that the LC comments had been dealt with by the addition of the new element in Section 8 for numbering of issue or part (5JSC/M/249.9.1)

## 253.29 2.3.8: LC: “Earlier variant title” is limited to integrating resources. LC notes again that catalogers may be creating a description from other than the first issue of a serial or multipart monograph and then find out later about earlier variant titles.

## 253.29.1 The Editor noted that RDA only provided instructions for basing the description on the first issue. The Chair commented that it was no more work to revise a description when the first issue became available than to add information about variants that appear on earlier issues. She added that the decision had been made at an earlier meeting (April 2007 - 5JSC/M/137.4).

253.30 2.4 Statement of responsibility. ACOC: Is there a need to make it clearer how the information transcribed here relates to that recorded in 7.15 *Performer, narrator and/or presenter* and 7.16 *Artistic and/or technical credits*?

253.30.1 The Chair said that she would withdraw the comment as the relationship is covered by the references.

253.31 2.7 LC: “Production statement” terminology (especially “producer” but also “production”) is problematic due to the different meaning of these terms in the content of moving image resources. LC again recommends the use of “manufacturer” and “manufacture.”

253.31.1 The JSC discussed the issue at length. The JSC decided to change the Production statement element to become the Manufacture statement. This will allow for better alignment with MARC 21 and ISBD.

**Action=Editor**

253.31.2 Production will cover “one-of a kind” resources. The JSC discussed whether there would only be instructions for the date of production to match DACS, RAD, and CCO. The Chair said that Australian libraries wanted to be able to record the place for archival resources when there is a clear association. Barbara Tillett commented that the museum community would want to record the “producer” of an object in some cases. The JSC decided that the Production statement element would have sub-elements for place, producer’s name, and date of production.

**Action=Editor**

253.31.3 In terms of Section 6, the JSC agreed that “Manufacturer” would be added at 21.2, and “Producer” would be moved to chapter 22.

**Action=Editor**

253.32 Date of ... elements

253.32.1 LC recommends again creating sub-types of beginning date and ending date (comparable sub-types to beginning/ending chronological designation for serials and to birth/death dates). Because a cataloguing agency may not always be describing from the issue/part/iteration prescribed for the mode of issuance of the resource being described and may not have ending information for a ceased resource, the agency will not always have the information to create the span of dates.

The Editor commented that the date elements were intended to be read by humans and not machine processed. Barbara Tillett withdrew the LC suggestion.

253.32.2 CCC: Not sure that there has been agreement to use the forms 1970s; 1970s?; 1800s; 1800s? Our original suggestion was to follow current AACR2 forms, e.g., 197-; 197-?; 18--; 18--? respectively.

It was noted that this had already been discussed (5JSC/M/253.16.2)

253.33 2.8.5.6.4: LC: This instruction needs to be clear about when “date of publication not identified” is recorded.

253.33.1 Barbara Tillett said that it appeared that some wording had been inadvertently omitted. The JSC agreed to the following wording proposed by LC: “If an approximate date of publication for a resource that is in a published form cannot reasonably be determined and

neither a copyright date nor a date of production is available, record *date of publication not identified*, enclosed in square brackets.”

**Action=Editor**

#### 253.34 Explanatory Annotations

253.34.1 CCC: A more general instruction (similar to the instruction at 2.18.6.3 Details relating to publication statement) allowing other details relating to the element not transcribed as part of the element is needed for *title* and *statement of responsibility*.

The JSC agreed.

**Action=Editor**

253.34.2 CCC: Related issue: RDA 2.2.3.4 indicates that a statement of responsibility taken from *outside* the resource can be given in square brackets while 2.4.0.2 states that a statement of responsibility must be taken from the same source as the associated title. Currently, with the instructions as written, a statement of responsibility not appearing on the same source as the associated title but still within the resource (e.g., cover, title page verso) is relegated to an annotation while one taken from outside the resource can be given in a statement of responsibility in square brackets. Is this reasonable or desired?

The JSC decided to remove “that appears in conjunction with” from 2.4.1.1.1 and replace it with “associated”, i.e., “A statement of responsibility relating to title is a statement of responsibility (see 2.4.0.1) associated with the title proper of a resource”.

**Action=Editor**

The JSC agreed that 2.4.1.2.1 would be expanded to allow statements of responsibility to be taken from another source within the resource, or from outside the resource. The Editor said that he would follow a similar pattern to other instructions, e.g., 2.9.0.2. Margaret Stewart noted that the change from AACR2 was that statements taken from another source within the resource would not be in square brackets.

**Action=Editor; Secretary (List of AACR2 changes)**

#### 253.35 Sources of information for sound resources

253.35.1 The Chair noted that the JSC had an action from a previous meeting to see if the ALA concerns about sources of information for sound recordings had been addressed (5JSC/M/141.12.1).

253.35.2 John Attig said that ALA still had a concern about collective titles found only on containers. He explained that according to 2.2.1.3.1, the preferred source for a sound recording will either be a label or embedded metadata. However, there will always be a label on a sound recording, which means that the cataloguer would never get to 2.2.1.3.2 for other sources (e.g., a container). The difficulty is that the collective title for the resource may be on one of these sources and not on the label. It was noted that 2.3.1.6.1 would not apply in this case as it covers when the collective and individual titles are both on the same source.

253.35.3 The Editor explained that these would be the steps followed by the cataloguer:

1. Start at 2.1.1.1.1: “When preparing a comprehensive description for a resource issued as a single unit (e.g., a textbook in one volume), choose a source of information identifying the resource as a whole”.

2. Then 2.2.1.0.1 “Use as the preferred source of information a source forming part of the resource itself that is appropriate to: a) the type of description (see 2.1) and b) the presentation format of the resource (see 2.2.1.1–2.2.1.3).”

3. Go to 2.2.1.3 where there is a choice of a label or embedded metadata, or any other source forming part of the resource itself. The preferred source needs to identify the resource as a whole.

253.35.4 John Attig asked in cases where there was no collective title, what source would be used for recording the individual titles as the title proper. The Editor said that you would start again at 2.2.1.3.1.

253.36 Linking words in alternative titles

253.36.1 The Chair noted that Hugh Taylor had prepared a document on the issue. Hugh Taylor said that there was an issue of where to record the linking word or term. He added that Adam Schiff had suggested on RDA-L that there be a separate element for this information. He said that in the document he had shown how automatic generation of the linking term would be difficult (mentioned at 5JSC/M/200.2) as there is not always a one-to-one relationship between language and linking term.

253.36.2 The Editor noted that if there was a separate element, one would also be needed for parallel alternative titles, and it would be difficult to match this up when there is more than one parallel alternative title.

253.36.3 The Chair asked why the alternative title was not recorded as part of the title proper or the parallel title. The Editor explained that the decision had been made in the past to have a separate element for the alternative title, to allow for access to it. John Attig said it had originally been an ALA suggestion, and the issue was with treating alternative titles as part of the title proper. He later noted that ALA had not been unanimous on the issue.

253.36.4 Alan Danskin said that he would not want the alternative title to be considered part of the preferred title formulated according to chapter 6. Hugh Taylor said that they were not currently considered part of the uniform title. The Editor noted that the instructions in chapter 6 did refer to the title proper.

253.36.5 The JSC decided that the alternative title will be considered part of the title proper. The reasons for the decision are the problem of where to put the linking words, and to bring RDA back into line with the ISBD. It was agreed that when transcribing the title proper the general instruction to add punctuation as required for clarity would apply. It was noted that the alternative title could also be recorded as a variant title.

**Action=Editor; Secretary (List of AACR2 changes – punctuation requirements)**

253.36.6 The Editor said that he would qualify all references to the title proper in chapter 6 to make it clear that the alternative title is not to be included when formulating the title proper.

**Action=Editor**

253.36.7 The Editor said that he would also remove the element for parallel alternative title.

**Action=Editor**

**254 Draft of RDA - Section 1 – Chapter 4**

- 254.1 Received and considered the following document:  
5JSC/Editor/RDA/ Section 1/Chapter 4
- 254.2 The Chair noted that there were no questions from the Editor in the cover letter for Chapter 4 (Providing acquisition and access information).
- 254.3 The Chair explained that one comment for discussion had been received from the LC representative prior to the meeting.
- 254.4 4.6.0.4.2: LC: it does not aid the user to retain a URL no longer providing access to the online resource when there is a valid URL provided in the description.
- 254.4.1 Barbara Tillett withdrew the comment. She added that she agreed with the comment by the ACOC representative that invalid URLs should be retained as users may know the resource by that URL. No change is required to chapter 4.

**255 Constituency Review of March 2007 Draft of Chapter 3**

- 255.1 Received and considered the following documents:  
5JSC/RDA/Part A/Chapter 3/Rev  
5JSC/RDA/Part A/Chapter 3/Rev/ACOC response  
5JSC/RDA/Part A/Chapter 3/Rev/CCC response)  
5JSC/RDA/Part A/Chapter 3/Rev/Chair follow-up/1  
5JSC/RDA/Part A/Chapter 3/Rev/LC response  
5JSC/RDA/Part A/Chapter 3/Rev/Chair follow-up/2  
5JSC/RDA/Part A/Chapter 3/Rev/Chair follow-up/3  
5JSC/RDA/Part A/Chapter 3/Rev/Chair follow-up/4  
5JSC/RDA/Part A/Chapter 3/Rev/CILIP response  
5JSC/RDA/Part A/Chapter 3/Rev/ALA response  
5JSC/RDA/Part A/Chapter 3/Rev/BL response
- 255.2 The Chair led a discussion on some of the comments suggested for priority discussion in the document “General comments on revised chapter 3”. Some comments were deferred to discussion of specific line numbers.
- 255.3 Use of prescribed terms and terms in lists: ALA general comment 2. c. Embedded vocabularies as dynamic lists, and d. Embedded vocabularies as closed lists “we see no reason why any of the lists should be closed”.
- John Attig said that ALA wanted a procedure to add to closed lists. He suggested that registering them as internet vocabularies provided an option.
- 255.4 Media type
- The JSC confirmed that Media type would be retained as an optional element.
- 255.5 Arrangement of elements: ALA general comment 4: The rationale for the order of elements within this chapter is not intuitively obvious. Consider alphabetical order.
- John Attig withdrew the ALA comment.



## 255.6 Stylistic issues

- 255.6.1 ALA general comment 6: a) *Consistency of examples*: If examples are not to be prescriptive, then should they be consistent even in matters that are not specified in the instructions?

John Attig said that consistency was not important in some areas and the examples showed this. The Editor commented that examples illustrated the main instruction, and not alternatives.

- 255.6.2 ALA general comment 6: b) *Spelling conventions*: Accept the conventions for spelling adopted for the text of RDA, but we would not want such conventions to be mandated for the data that we record in applying the instructions (e.g., colour).

The JSC decided not to have a controlled list at 3.12.0.3 (Recording colour), but agreed to retain the examples. John Attig said that he thought this would be satisfactory.

**Action=Editor**

- 255.6.3 ALA general comment 6: e) *Lists and examples*: See no need for an example that consists solely of one of the terms in the preceding list. Would like to see more differentiation by layout or typography between the terms and the examples.

The Editor noted that this did not occur in the latest RDA drafts.

- 255.7 FRBR user tasks. ALA general comment 1: The distinction between *identification* and *selection* is a subjective one.

John Attig said that although this was still true, there was nothing for the JSC to usefully discuss.

- 255.8 Complexity of instructions. ACOC: Instructions are very complex. ALA general comment 3: each draft represents an increase in size and complexity. RDA needs to be used by working cataloguers.

John Attig noted that JSC decisions (as proposed by the constituencies) added to the complexity.

- 255.9 Carrier terms. ACOC: Inclusion of obsolete terms makes RDA look closely tied to the description of physical resources.

The Chair said that this did not need to be discussed.

- 255.10 Impact on ILMS Systems. ACOC: Encourage JSC to work closely with ILMS vendors.

The Chair said that this was an action for the co-publishers.

- 255.11 The Chair led a discussion of line numbers identified as priorities in the “Response table for revised chapter 3 (2007) including wiki discussions”.

- 255.12 3.12.0.3.1 Recording colour

- 255.12.1 Line 29: Current draft of chapter 3 ignores grey. Correct instructions? (LC)

The JSC agreed to discuss this with similar comments on the Glossary.

**Action=Glossary Editor**

255.13 3.1.4 Resources consisting of more than one carrier

255.13.1 Line 40: Add: "To describe a collection consisting of more than one carrier, see 3.4.0.11 or apply one of the methods below." (LC)

The JSC decided to add a reference to 3.4.0.11 at 3.1.4 c). The Editor said that he would also add something at 3.1.4 to the effect that storage space is in certain conditions a way of recording extent.

**Action=Editor**

255.14 3.2.0.2 Recording media type

255.14.1 Line 47: RDA should be explicit about how this element is to be recorded when categories appear to overlap, i.e. audio/video/computer (ALA). 3.2.0.2.1: Use "Record the media type(s) using one or more of the terms ..." (LC)

John Attig noted that in the document "Chapter 3 wiki – ALA addenda" two alternatives had been presented: reword the definitions to be exclusive, or to apply more than one term. The Editor said that the second alternative was the intent, and that you would record *audio* or *video* and *computer*. The JSC agreed to the following wording for the instruction: "Record the media type using one or more of the terms listed in Table 1".

**Action=Editor**

255.14.2 Line 49: Computer: Does this category include computerized devices issued with the content pre-loaded? (ALA)

The Editor said that it would, as the scope of the media type element covered viewing of the content, not of the resource. The Chair noted that in the wiki LC had suggested that examples be added. The JSC decided to ask Examples Group 1 to add some examples at 3.22 (Notes on equipment and systems requirements) to cover devices with pre-loaded content, e.g., "playaways".

**Action=Examples Group 1**

255.15 3.3.0.2 Recording carrier type

255.15.1 Line 62: 3.3.0.2.2: Include categories of 3-dimensional carriers? Otherwise "globe", "model" etc., need to be added to list of unmediated (ALA). Unmediated class does not include any terms for sculptures or models. Perhaps use "object" (CILIP)

The Chair noted that "globe" and "model" were covered in the extent of cartographic resources. The JSC decided that the CILIP comment (and line 68) was covered by "other unmediated carrier" which is allowed for at 3.3.0.2.3. The Chair noted that this carrier type would not appear in an extent statement and that there was no requirement to display the carrier type to users.

255.16 3.4 Extent

255.16.1 Line 69: Unfortunate that label "required" and footnote appear only at the beginning (ALA)

The Chair noted that this had been discussed with the Editor's Style Guide (5JSC/M/227.5 and 227.7).

255.17 3.4.0.3 Recording extent

255.17.1 Line 72: Exceptions: have only caption and reference (ALA); Remove examples from "exception" instructions (LC)

John Attig said that ALA was concerned that cataloguers would try to apply the simplified instructions. The JSC agreed that the exceptions at 3.4.0.3 would contain only a reference to the complete instructions, e.g., "Record the extent of a cartographic resource as instructed under 3.4.1."

**Action=Editor**

255.18 3.4.0.3.1 d) Text

255.18.1 Line 77: If instructions retained, acknowledge exceptions, e.g., for loose-leafs (ALA)

The Chair noted that this was moot based on the decision at Line 72.

255.18.2 Line 80: Inconsistency between 3.4.0.3.1d3 and 3.4.4.18.1 with regard to sheets. 3.4.4.18.1 does not give the option of adding the number of pages, etc., after the number of sheets. Add "if the resource consists of volumes, portfolios, or cases" to end of 3.4.0.3.1d.3 (CCC); 3.4.0.3.1d3 Use "For a resource consisting of more than one volume, sheet, portfolio, or case, see 3.4.4.15-3.4.4.19" and delete the examples. (LC)

The Chair noted that this comment was also moot based on the decision at Line 72.

255.19 3.4.0.7 Number of subunits

255.19.1 Line 88: Modify 3.4.0.7 to add concepts of "if ascertainable" and "according to policy of the cataloguing agency." (LC)

The Editor said that the footnote at 3.4 (Extent is a required element only if the resource is complete or if the total extent is known) would appear after the core element label. He said that he would add, "Record subunits only if readily ascertainable and considered important for identification or selection". The Editor said that he would remove any similar wording from 3.4.0.7-3.4.0.9.

**Action=Editor**

255.19.2 Line 90: Use "Specify the number of subunits as applicable and if readily ascertainable and considered to be important for identification and selection." (ALA)

The Chair noted that this was covered by the previous decision.

255.19.3 Line 91: 3.4.0.7.1e1, 2nd example: The example "1 online resource (3 scores)" introduces some confusion.(CCC)

Margaret Stewart said that she had been told this was confusing, because it could either mean three scores in more than one volume, or in one volume containing more than one work. She asked what the number would be based on in the case of notated music in electronic form, the number of files, or the number of works. The Editor said that the instruction was concerned with files that parallel a print or graphic counterpart. The Chair

noted that you did not need to know the number of volumes. Margaret Stewart withdrew the comment.

255.19.4 Line 92: 3.4.0.7.1e1-2: does scope of these two instructions need to be so distinct? (ALA)

After discussion, John Attig withdrew the comment.

255.19.5 Line 95: 3.4.0.7.1e2: Include "when readily ascertainable and considered to be important" (ALA)

The Chair noted that this was covered by the decision at Line 88.

255.20 3.4.0.10 Resource not yet complete

255.20.1 Line 99: Find a better way to deal with revision made to an existing description based on changes in the resource over time. (ALA)

The JSC decided to change the caption at 3.4.0.10 to "Incomplete resource" and to delete 3.4.0.10.3, and the second and third examples under 3.4.0.10.4.

**Action=Editor; Examples Group 1**

255.20.2 Line 100: 3.4.0.10.4: should only apply to updating loose-leaves. If it does apply to all loose-leaves it does not belong in this section. (ALA). 3.4.0.10.4 Change to AACR2, but LC agrees (LC)

The JSC agreed to change the instruction to begin: "If the resource is an updating loose-leaf ...".

**Action=Editor**

255.21 3.4.0.11 Comprehensive description of a collection

255.21.1 Line 101: 3.4.0.11.1a.1: Would this allow the use of a more-specific term if appropriate, e.g., "300 slides" or "500 vocal scores"? (ALA)

The JSC decided to change 3.4.0.11c to "Number and type of carrier" and asked the Editor to reword the instruction to apply to collections of one or more types of carriers. The Editor said that he would check on the applicability of the reference to 3.1.4.

**Action=Editor; Examples Group 1**

255.21.2 Line 103: 3.4.0.11.1b.2 Shouldn't ref to App. B appear earlier in the chapter or not at all? (LC)

The JSC decided to retain the references to Appendix B at 3.4.0.11.1b.2 and 3.5.0.3.2, as these are the only places it is relevant.

255.22 3.4.1.1 Recording extent of a cartographic resource

255.22.1 Line 107: 3.4.1.1.3: Only a few of the terms in the lists under 3.4.3.1 and 3.4.5.1 are really applicable, there should be an option to use an appropriate term to designate the type of unit. (ALA)

The JSC agreed with the wording suggested by ACOC in the wiki: "If none of the terms listed above is appropriate, use a term designating the type of unit as concisely as possible. Use terms taken from the lists under 3.4.3.1 and 3.4.5.1 if applicable."

**Action=Editor**

255.23 3.4.2 Extent of notated music

255.23.1 Line 111: Change order of 3.4.2.0.2 and 3.4.2.0.3. Label 3.4.2.0.2 as an alternative (ALA)

The Editor said that 3.4.2.0.2 was not really an alternative. John Attig commented that the ALA proposal was not the solution. The JSC asked the Editor to find a solution.

**Action=Editor**

255.24 3.4.2.1 Scores and parts

255.24.1 Line 114: 3.4.2.1.1: Restore "miniature score" or use "study score" (ALA). 3.4.2.1.1: Given that the earlier CCC proposal to replace "miniature score" with "study score" was not agreed to, the term "miniature score" should at least be retained. (CCC)

John Attig said that there was a proposed definition of "study score" in the ALA addenda. The JSC members agreed to say whether they agreed with the definition as quickly as possible after the meeting.

**Action=JSC**

255.24.2 Line 115: 3.4.2.1.1: Allow for use of other terms (ALA)

The JSC decided that no changes were necessary, as 3.4.2.2.2 would apply.

255.25 3.4.4.1 Single volume

255.25.1 Line 131: 3.4.4.1.1 e) Only refer to 3.4.4.2 (LC)

The JSC decided that 3.4.4.1.1 e) was not necessary and should be deleted.

**Action=Editor**

255.25.2 Line 133: 3.4.4.1.2: add additional guidance based on DCRM(B) 5B1.1

John Attig said that he would agree to a general principle not to include rare book rules that went beyond what was in RDA. He added that he did want to discuss any conflicts.

255.25.3 Line 134: FRE: Why except printed text from the general rule?

The Chair asked if it should be explained in the text that AACR2 practice was being carried forward. The JSC decided to note this as a training issue.

**Action=Secretary (List of training issues)**

255.26 3.4.4.2 Unnumbered pages, leaves, or columns (cover letter)

255.26.1 Line 136: Agree to use "unnumbered" but would like to test concept with complex examples (ALA)

The Chair noted that the Editor would be implementing the JSC decision to use “unnumbered” (5JSC/M/205.4.1). John Attig said that some examples had been suggested in the ALA addendum. The JSC referred these to the Examples Group.

**Action=Editor; Examples Group 1**

255.27 3.4.4.5 Incomplete item

255.27.1 Line 142: Generalize these instructions to all types of carriers which are issued or published in an incomplete state. Distinguish between incomplete/damaged expressions/manifestations and items. (ALA)

Barbara Tillett asked how it was possible to have a damaged expression. The Chair said that there were implications for the definition of “expression” and asked John Attig if he wanted to pursue the FRBR issue. John Attig withdrew the comment.

255.28 3.9.0.4 Production method for manuscripts

255.28.1 Line 247: 3.9.0.4.2: Should not be a closed list (ALA)

John Attig suggested that there be an instruction to use a term in common usage. The Editor noted that as well as the list at 3.9.0.4.1, there were also terms embedded in the instruction at 3.9.0.4.2. The JSC agreed that both lists needed to be opened up.

**Action=Editor**

255.29 3.12 Colour

255.29.1 Line 257: Move to chapter 4 (ALA)

John Attig explained that whether or not something was conceived as being in colour was an attribute of content. The JSC discussed the issue and agreed to treat colour of content at the expression level and move all instructions at 3.12 to chapter 7. It was noted that item specific details of colour would be covered at 3.23, and that some examples at 3.12 could be moved there. The JSC agreed that nothing would remain at the manifestation level. The Editor commented that anyone following ISBD/MARC 21 would move information on colour to the other physical details (300\$b).

**Action=Editor; Examples Group 1**

255.29.2 Line 267: Include an indication of whether the resource was issued with the colouring or was added after issue, and whether the colouring applies to the manifestation or the item, with a default assumption that it applies to the item unless there is evidence to the contrary. (ALA)

The Chair noted that this had been covered by the previous discussion.

255.30 3.13 Foliation

255.30.1 Line 274: Terminology is confused (ALA); Problems with the term "foliation" (CILIP)

John Attig said that the element had been misnamed. The JSC agreed to name the element “Book format”, and to retain the existing definition.

**Action=Editor; Glossary Editor**

John Attig noted that the examples at 3.13.1 did not belong in this section, as they were about numbering peculiarities. The Editor said that he would see where the examples should be placed at 3.4.4, and whether an instruction needed to be written.

**Action=Editor**

255.31 3.17 Sound characteristics

255.31.1 Line 282: Instructions belong in chapter 4 - except for how sound is recorded for playback (ALA)

John Attig said that the ALA position was that the presence or absence of sound was an aspect of content. The JSC decided to move 3.17.0.3.1 and 3.17.0.3.2 to chapter 7 at the expression level.

**Action=Editor**

255.32 3.17.0.4 Type of recording

255.32.1 Line 285: Make separate sub-types for nature of the encoding (analog, digital) and nature of the carrier (magnetic, optical) (ALA). Explain that "analog" and "digital" are to be used for discs and tapes and "magnetic" and "optical" for sound track films (CCC).

The Editor said that he could make two element sub-types, but that he needed assistance with the appropriate terms. John Attig said that he would try to supply wording.

**Action=Editor; ALA representative**

Margaret Stewart asked if this meant that that there was not agreement with the CCC suggestion that the element be called "Basic playback characteristics". The Chair confirmed that there was not agreement.

255.33 3.19.1.3 Details of video characteristics

255.33.1 Line 303: FRE: 3.19.1.3.2: Regional encoding too important to be in a note

John Attig said that the ALA addenda provided some background information. The JSC decided to make regional encoding a new element sub-type under digital file characteristics (a new 3.20.0.6).

**Action=Editor**

255.34 3.20.1.3 Details of digital file characteristics

255.34.1 Line 322: If it is appropriate to use this element to specify whether a video or audio file is streaming or downloadable, please make this explicit and include examples (ALA).

It was noted that transmission speed was covered at 3.20.0.7 with a parenthetical example for streaming audio or video. The Editor said that whether or not a resource was "downloadable" was something different. The JSC asked the Examples Group to add an example of a streaming video file at 3.20.0.4.2.

**Action=Examples Group 1**

255.35 John Attig noted that the placement in RDA of instructions on aspect ratio still required discussion (lines 293, 295, 297). The Chair suggested that this be covered in a conference call.

**Action=JSC**

**256 Changes over time**

- 256.1 Barbara Tillett noted that she had prepared a discussion paper with Judy Kuhagen on “Changes over time that impact the inherent work”. John Attig said that he would not be able to answer any of the questions in the document without consulting further.
- 256.2 The JSC asked Barbara Tillett to reissue the paper in a form that could be used for consultation, and to limit the suggestions to what could be implemented for the first release of RDA. (Note: see 5JSC/LC rep/3 series.)  
**Action=LC representative**

**257 RDA Glossary**

- 257.1 Received and considered the following documents:  
5JSC/Chair/11/Chair follow-up/1  
5JSC/Chair/11/Chair follow-up/2  
  
5JSC/Policy/3/Rev
- 257.2 The JSC confirmed the earlier decision that the Secretary would take over as Glossary Editor. The JSC asked the Secretary to identify the best way to proceed with this work.
- 257.3 The Chair asked the Secretary to check that all terms in the Glossary list at 5JSC/Chair/11/Chair follow-up/1 are present in the RDA text and to record the instruction numbers. She added that even if the instruction numbers changed in the authoring system, an earlier instruction number would still be useful. The Editor said that the Glossary Editor could start with existing drafts. He noted that it was important to ensure that the Glossary included all terms with a scope statement.  
**Action=Glossary Editor**
- 257.4 John Attig asked whether the definitions of roles and relationships from the Appendices would be included in the Glossary. The Editor explained that it would be a mechanical process to include them so long as the definitions were marked by a style. The Chair noted this as a question for the co-publishers.  
**Action=Chair**
- 257.5 The Chair led a discussion on the general comments in the “Compilation of responses to “Review of terms for the RDA Glossary (Part A)””
- 257.6 References from AACR terms to RDA terms
- 257.6.1 The JSC agreed with the Glossary Editor’s recommendation that these are not required.
- 257.7 Differences in wording between text and glossary
- 257.7.1 The JSC agreed that the wording would be essentially the same except for differences in introductory wording.
- 257.8 Related comments on Element names and Scope statements
- 257.8.1 The JSC confirmed that all element names would be included in the Glossary.
- 257.9 Controlled vocabularies



- 257.9.1 The Chair said that it had been noted at the previous meeting that it would be desirable for terms in controlled lists to be included in the Glossary, but that there was not the time to do this. John Attig commented that this was important for the work on registering vocabularies.
- 257.9.2 The JSC decided that terms for the following would be included in the Glossary for constituency review: media type, content type, carrier type, and mode of issuance.
- 257.9.3 The JSC asked the Glossary Editor to identify controlled lists in RDA so that the JSC could prioritise those for inclusion in the Glossary for the first release.
- 257.10 Other possible criteria for inclusion of terms in the Glossary
- 257.10.1 Margaret Stewart noted that CCC had suggested that in some cases it would be useful to include a definition in the Glossary, even if it matches a dictionary definition, to benefit those who may not have a great deal of familiarity with the material, e.g., “artefact”. The Chair suggested that these would be at the second level of priority.
- 257.10.2 The Editor said that a term specified in an instruction, e.g., “trailer” should be considered the same as a controlled list.
- 257.11 Glossary review process
- 257.11.1 The Secretary suggested that she prepare a Program of Work for the Glossary for confirmation. The JSC agreed.  
**Action=Glossary Editor**

## 258 Appendices A-C (Capitalization, Abbreviations, Initial Articles)

- 258.1 Received and considered the following documents:  
5JSC/Chair/9/Chair follow-up/6/Rev  
5JSC/Chair/9/Chair follow-up/8/Rev
- 258.2 The Chair invited Judy Kuhagen, Chair of the Appendices Working Group, to the table to lead a discussion on the drafts of appendices A-C. The Chair noted that appendices A-B were in 5JSC/Chair/9/Chair follow-up/8/Rev and Appendix C was in 5JSC/Chair/9/Chair follow-up/6/Rev.
- 258.3 Responses to JSC requests in 5JSC/Chair/9/Chair follow-up/5
- 258.3.1 The JSC agreed with the Working Group recommendation that no abbreviations be specified for names of agencies responsible for assigning identifiers for persons, families, and corporate bodies.
- 258.3.2 The JSC agreed with the Group that to support the principle of representation, there should be no abbreviation of words used in numbering of serials (2.6). Any abbreviations found on the sources of information will be retained. It was noted that this would be a change from AACR2.  
**Action=Secretary (List of AACR2 changes)**
- 258.3.3 The JSC agreed with the Group that there would be abbreviations of words used with numbering in the preferred access points for musical works (6.21.0.3), because such

abbreviations (e.g., “op.” and “no.”) are in common use and facilitate indexing and display.

- 258.3.4 The JSC agreed with the Group that there would be abbreviations of words used for numbering within series and within subseries in the preferred access points for these works because such abbreviations facilitate indexing and display. It was noted that this would correspond to the new element for numbering of issue or part in Chapter 24. The JSC agreed that the new element would refer to Appendix B.

**Action=Editor**

- 258.3.5 Judy Kuhagen said that the Group needed guidance from the JSC on the following recommendation: “Abbreviate words used for numbering within series (2.11.8) and within subseries (2.11.16) to allow the series statement to be the preferred access point for the series in some situations. The latest change to AACR2 B.5B1 to allow the substitution of an abbreviation with the prescribed abbreviation has been retained in the draft of appendix B (B.4.1.1); the JSC will need to decide if this instruction (intended to increase the number of situations in which the series statement can be the preferred access point) will be retained even though it violates the principle of representation.” John Attig noted that there was a proposal before MARBI to make the 440 tag obsolete in favour of 490 and 8XX fields. The JSC decided that there would be no abbreviation or substitution of abbreviations in the transcribed series elements (AACR2 change). However, use of abbreviations and substitution of abbreviations will apply in the “Numbering of issue or part” element, where consistency is important.

**Action=Appendices Working Group; Secretary (List of AACR2 changes)**

- 258.4 Appendix A – Capitalization

- 258.4.1 The JSC discussed the Group’s recommendation to move some of the instructions now in the draft chapters 1, 5, and 8 related to capitalization to the appendix. The JSC decided that the subhead “Capitalization” would be retained, and a reference made to the Appendix. Judy Kuhagen said that the Group would look at the drafts of Sections 6 and 8 to see if the same principle could be applied.

**Action=Editor; Appendices Working Group**

- 258.4.2 Judy Kuhagen noted the Group comment that “The sentence “If the addition is given in parentheses, capitalize the first word of the addition and any proper name” in A.2.4.1 in the appendix is not supported by an instruction in 9.1.1.2.1 for categories b) and e) to give those additions in parentheses.” She added that this was now covered in Appendix E, and additions did not need to be made to 9.1.1.2.1.

- 258.4.3 Judy Kuhagen noted some of the minor changes made to the Appendix and pointed out that although the examples were not up-to-date they did illustrate the principles involved.

- 258.4.4 The JSC discussed the draft of Appendix A and asked the Group to make the following changes.

**Action=Appendices Working Group**

Remove the alternatives at A.1.2 and A.1.3 as they are in chapter 1.

Change references to “access points” to “names” as the same provisions apply.

Change “subdivision” at A.2.1.1 to “first word of each name”.

Remove any occurrences of “headings”, e.g., as found in the caption at A.2.4.

Change references to “additions”, e.g., change the caption at A.2.4 to “Other terms used with names of persons”. The Editor suggested that the instruction might need to be broken up in line with the elements in the RDA text.

Change the caption of A.3 from “Preferred titles” to “Titles of works”. The Editor said that he would follow the ALA suggestion and combine the elements for preferred and variant titles into one element with two sub-elements and would do the same for preferred and variant names.

**Action=Editor**

Change the caption of A.4 from “Transcribed titles” to “Titles of manifestations”.

Change A.3.3.3 to refer to the element in chapter 24 for numbering of issue or part.

Remove any occurrences of the word “rule”, e.g., in the caption at A.4.1.

Change “each subdivision of the title” at A.4.1.1 to “a title of a part, section, or supplement” to match 2.3.0.7.

Reinstate the instruction not to capitalize the first word or the abbreviation of the first word in other title information. This will allow the data to be recorded correctly for an ISBD display.

Annotate the instructions in the appendices with the AACR2 rule references (following the Editor’s style).

Move A.4.4 to a new first level subhead after A.5.

Reinstate the instruction on capitalization of numbering of serials.

Make a new first level subhead for “Terms used with numbering” and have separate instructions for numbering of serials (chapter 2), numbering within series and subseries (chapter 2), and numbering of issue or part (chapter 24).

Delete A.6 (Carrier) as it is covered by the general instruction at A.1.1.

Delete A.7 (Standard numbers) as it is covered by the respective standards.

258.4.5 During the discussion, the Chair suggested that the instructions in the appendix for music and series should have the appropriate metadata tagging. The Editor said that he would confirm with Nannette Naught that there would be metadata tagging in the appendices. It was noted that this would not be a task for the Working Group.

**Action=Editor**

258.4.6 The JSC agreed with the Group recommendation to replace the instructions at A.4.1.4 and A.4.1.5 (from AACR2 A.4A1) with a simplified instruction at A.4.1.3.

258.4.7 The JSC discussed the Group recommendation to delete 1.7.1.2.1 (repeated at A.4.4.1) on other transcribed elements. The JSC agreed, and noted that this would affect cases where the edition statement begins with a word rather than a number. In the case of production/publication/distribution statement elements many of the elements will be

capitalized anyway due to the conventions of the language. (Post-meeting note: In September 2008 the JSC agreed to add an instruction to Appendix A specifying capitalization of the first word in a designation of edition)

**Action=Secretary (List of AACR2 changes)**

258.4.8 The JSC asked the Editor to include at 1.8.1 the instruction on roman numerals at A.5.2. The Editor said that he would use the term “uppercase”.

**Action=Editor; Appendices Working Group**

258.4.9 The JSC asked the Appendices Working Group to make a recommendation on the capitalization of role and relationship designators.

**Action=Appendices Working Group**

258.4.10 Judy Kuhagen noted that the footnote for the A.38 section (AACR2 A.40) had been revised to warn people that some aspects of the German spelling reform are being modified. The JSC asked the Group to put the footnote in the active voice and to make it clear who in Germany is behind the changes.

**Action=Appendices Working Group**

258.4.11 John Attig said that he wanted it to be recorded that ALA was still of the view that consistency of capitalization is not required to support any of the user tasks. The Editor commented that it helped to meet the objective of uniformity.

258.5 Appendix B – Abbreviations

258.5.1 The Chair noted that some decisions related to this appendix had been made at the beginning of the discussion (5JSC/M/258.3).

258.5.2 Judy Kuhagen said that the JSC had asked the constituencies for their opinion on the use of “etc.” in the collective titles *Laws, etc., Protocols, etc., and Treaties, etc* (cover letter question at line 378 in the December 2007 draft response table). The Chair said that ACOC, ALA, CCC, and LC had all said that “etc.” should continue to be used. Hugh Taylor and Alan Danskin said that they were prepared to go with the majority view. Judy Kuhagen said that this meant no changes to the Appendix.

258.5.3 The JSC agreed with the Group recommendation to retain the use of abbreviations for musical voices (e.g., “S” for “soprano”) as they are in widespread use in that field.

258.5.4 The JSC agreed with the Group that there would be no abbreviation by the cataloguer in the transcribed elements of edition statement, places of production /publication/distribution, and names of producers/publishers/distributors. The JSC decided that as the result was that there would no longer be any abbreviations in transcribed elements, 1.7.7 would consist simply of a general instruction not to abbreviate (similar to existing 1.7.7.2).

**Action=Editor; Secretary (List of AACR2 changes)**

258.5.5 Judy Kuhagen noted that the Group had suggested that a reference to Appendix B be added at 6.21.0.3 (recording numeric designations). The JSC agreed.

**Action=Editor**

258.5.6 Judy Kuhagen said that she would delete the alternatives at B.1.2 and B.1.3 to match what had been done for Appendix A (5JSC/M/258.4.4).

**Action=Appendices Working Group**

258.5.7 Adam Schiff suggested that B.2.1 d) distinguishing terms added to names of persons no longer applied. Judy Kuhagen said that she would check this.

**Action=Appendices Working Group**

258.5.8 The JSC decided that B.4.4.2 would begin “Generally do not abbreviate ...”

**Action=Appendices Working Group**

258.5.9 Judy Kuhagen said that she would expand B.4.5 (Annotations on elements) to cover details of elements.

**Action=Appendices Working Group**

258.5.10 Judy Kuhagen noted that the JSC had agreed to remove abbreviations for months. She asked whether the JSC wanted to retain the abbreviations for certain countries, states, provinces, territories, etc. The JSC agreed that they would be retained for the first release of RDA. Adam Schiff commented that “Yukon Territory” was now “Yukon”. The JSC agreed that this meant it did not need to be included in the table.

**Action=Appendices Working Group; Secretary (List of issues for consideration after the first release of RDA)**

258.6 Appendix C – Initial articles

258.6.1 Judy Kuhagen said that she had no issues to raise with the JSC regarding Appendix C. She added that she would be fixing typos which had been found and removing the yellow highlighting.

258.6.2 Judy Kuhagen said that she would consult with the Editor after the meeting regarding some inconsistencies in the instructions on omitting initial articles.

**Action=Appendices Working Group**

## **259 Appendices D-E (Record syntaxes)**

259.1 Received and considered the following documents:

5JSC/Editor/RDA/Appendix D

5JSC/Editor/RDA/Appendix E (Access point control data)

259.2 The Editor led a discussion of the issues raised in the cover letter for Appendix D.

259.3 D.1.1 Order of elements

259.3.1 The Editor noted that would revise the numbering of RDA elements in the right-hand column of the table after the meeting.

**Action=Editor**

259.4 D.1.2 ISBD punctuation

259.4.1 The Editor said that as agreed in discussion of earlier drafts of Appendix D, the instructions under D.1.2 derived from AACR2 included only the instructions listed under the heading “Recommended punctuation” for each area in the consolidated ISBD (i.e., enclosing and separating punctuation). He added that the one exception was the comma separating a statement of equinox and statement of epoch (which are not separate elements in ISBD). The JSC said that this was acceptable.

- 259.4.2 The JSC discussed whether there would be a RDA to ISBD mapping. The Chair said that as there were a number of unresolved issues to do with mappings, all she could do was note an RDA to ISBD mapping as a possible tool in RDA online.  
**Action=Chair**
- 259.4.3 Barbara Tillett said that she thought that the punctuation column should be removed as it was confusing. The Editor said that the Appendix matched the presentation in the consolidated ISBD, and is what would be used by a programmer to supply the punctuation. The Chair said that the column would be retained for the time being.
- 259.4.4 The Editor said that in the instructions under D.1.2, ISBD terminology was used to refer to elements, even though that terminology was not always consistent with the naming of elements in RDA (e.g., edition statement).
- 259.5 D.1.4 Multilevel description
- 259.5.1 The Editor explained that the ISBD term “multilevel description” had been retained in D.1.4; however, the term used in RDA has been changed to “hierarchical description”.
- 259.6 D.2 Mapping of MARC 21 bibliographic to RDA
- 259.6.1 The Editor said that this mapping was only preliminary and needed to be reviewed. Margaret Stewart said that LAC was willing to do this with assistance from the ALA and BL representatives.  
**Action=CCC representative, ALA representative, BL representative**
- 259.6.2 The JSC agreed that ideally an RDA to MARC 21 mapping would be included as a tool with the first release. It was agreed that there would not be time to prepare this prior to the full draft for constituency review. The Chair said that she would report back on mappings after the meeting with the co-publishers.  
**Action=Chair**
- 259.7 The Editor said that the mapping of subfields in the 76X-78X fields was problematic from an RDA perspective as the subfields defined for each of those fields reflect a mix of elements associated with works, expressions, and manifestations. Margaret Stewart said that she would indicate in the mapping when there is not a direct correspondence.  
**Action=CCC representative**
- 259.8 D.3 Dublin Core
- 259.8.1 The Editor said that this section was currently a placeholder as the mapping he had prepared for the April 2007 meeting in London had yet to be reviewed by the DCMI/RDA Task Group. The Chair said that she would ask the Project Manager to ask Gordon Dunsire about this.  
**Action=Chair**
- 259.9 Examples
- 259.9.1 The JSC referred the following comment in the cover letter to Examples Group 1: “The examples under D.1.2-D.1.4 will need to be reviewed for consistency with instructions in the current drafts of RDA. They will also need to be reviewed for consistency with appendix B after final decisions are made on the use of abbreviations.”  
**Action=Examples Group 1**

## 259.10 Appendix E

259.10.1 The Editor said that the instructions given under E.1 on the presentation and punctuation of access points had been derived from AACR2 Part II. He added that there were currently no instructions in the appendix on presentation and punctuation of access points representing families. It was noted that Line 688 in the response table for the December 2007 draft was relevant (5JSC/M/240.10.1). The JSC asked Examples Group 2 to make a recommendation on the presentation and punctuation of access points representing families.

**Action=Examples Group 2**

259.10.2 The JSC decided to change the caption of E.1 from “AACR2 Presentation” to “Presentation”. It was agreed to note in the text that it was modelled on AACR2.

**Action=Editor**

259.10.3 The JSC referred the following comments in the cover letter for Appendix E to Examples Group 2: “The examples in the draft include revisions and additions provided by Examples Group 2 following the October 2007 JSC meeting. Those examples, as well as the examples that remain unchanged from the September 2007 drafts of chapters Part B, chapters 8 and 19 will need to be reviewed for consistency with instructions in the current drafts of Section 3, chapters 9-11. They will also need to be reviewed for consistency with appendix B after final decisions are made on the use of abbreviations. The explanatory comments accompanying examples will also need to be reviewed for consistency in wording and appropriateness to the instructions under which they are placed.”

**Action=Examples Group 2**

## 260 “Data about data”

260.1 The JSC agreed that there would not be an appendix on data about data. The Editor suggested that “data about data” was handled by the following techniques in RDA: as a note on an element that provides information about what has been recorded in the element; as a specified value for an element; by identifying the source of the element, e.g., in the case of resource identifiers such as Publisher's number for music; and as a relationship designator which is added as a refinement to an element, e.g., when referencing a related work.

**Action=Secretary (List of training issues)**

260.2 The Editor said that given the nature of RDF coding for literal values (i.e., transcribed elements) if you wanted to say more about an element it would become a non-literal value. He added that feedback from people who had implemented RDF was that non-literal values should be avoided. He said that as a result he had avoided adding “data about data” to a literal value as part of the element. The Editor noted that there was nothing to link an element and a note on an element, but that he thought the nature of the annotation should make this clear. The Editor said that it was possible to add language to a literal value, but that was all.

260.3 The Chair led a discussion on the issues concerning “data about data” raised at earlier meetings and listed in the agenda:

260.3.1 How to handle statements such as “title varies”, “publisher not identified” (5JSC/M/160.3.2)

The JSC agreed that “title varies” was a note on an element and “publisher not identified” was the value for an element.

260.3.2 Data about data in relation to: calendar (5JSC/M/183.27.1)

The Chair said that the issue was the calendar preferred by the agency. The Editor suggested that if you wanted to specify the calendar this would be covered by a note on the publication statement. The Chair confirmed that none of the JSC members saw the need for anything more. The Editor commented that RDA covered data that is displayed to the end user, and that records could go beyond this.

260.3.3 Data about data in relation to: when parallel title is from a different source to the title proper (5JSC/M/198.5.1)

The Chair suggested this could be recorded in a note. John Attig said that this was originally an ISBD issue. He added that RDA defined the parallel title more broadly than ISBD, so in order to create an ISBD display you had to know about the titles that came from a different source. The Editor said that this was a limitation in terms of correspondence with ISBD.

260.3.4 Data about data in relation to: format of standard numbers (5JSC/M/198.25.1)

The Editor said that this was resolved by referring to the display format (5JSC/M/253.17.2). The Chair noted that the context had changed.

260.3.5 Data about data in relation to: recording language (5JSC/M/200.2)

The Chair said that this issue originally related to linking words in alternative titles and that there was no longer an issue (5JSC/M/253.36).

260.4 John Attig commented that in RDA there were frequent references to the “language preferred by the agency”, and that in MARC 21 the 040 \$b was used to record the language of the description. He asked about RDA declaring the language of the description. The Editor commented that there was no entity to attach this to as there is no “record” entity in FRBR or FRAD, and that this was out of scope. John Attig said that he thought it would be useful to encourage people to capture the language information using the record syntax.

260.5 The Editor said that the default for any controlled list in RDA is the RDA list. He said that as agreed, in the General Introduction it would say that you could use other lists but you had to indicate the source (5JSC/M/240.3.1). John Attig noted that there was nowhere in RDA to record this. Margaret Stewart said that this would be an issue for people who wanted to use the MARC 21 relator terms. She said this would bring this up with MARBI, but she thought it would be difficult to accommodate in MARC 21. The Chair noted that the JSC had nothing to recommend to MARBI.

**Action=CCC representative**

260.6 The JSC agreed to include a statement on “data about data” in the meeting outcomes.

**Action=Secretary**



**261 Placeholder chapters for Group 3 entities in Section 4 — Recording attributes of concept, object, event, and place; Section 7 — Recording subject relationships; Section 10 — Recording relationships between concepts, objects, events, and places**

261.1 The Editor said that it was not possible for him to draft even the first chapter of each section, as FRSAR was still under development. He said that in the online product these chapters would say, “to be added”. He noted that there was a sentence in the General Introduction specifying that these chapters would not be developed until after the first release of RDA.

**262 Complete draft of RDA for constituency review**

262.1 Examples

262.1.1 The Chair noted that the JSC had already discussed the number and nature of composite examples to be provided with the complete draft (5JSC/M/230.12.2). The Chair said that she had noted for discussion with the co-publishers the potential to link between composite examples and individual examples.

262.1.2 Hugh Taylor said that the JSC had never really discussed how many examples would be provided in the text of RDA. He added that there had been comments about there being too many examples, and that this was usually as a result of reorganization of the text. The Chair said that she would raise with the co-publishers the suggestion that a small number of examples be shown with an instruction, with the ability to press a button and see more. The Editor noted that the metadata coding for examples did not include a category for “good” examples. He said that this meant that any cut-off would be arbitrary. It was agreed that the Examples Groups would not be asked to remove examples until the options for what to do with them were known. The Chair said that the Examples Groups would be asked to group examples where possible. She added that she would ask the co-publishers about how this grouping could be used.

**Action=Chair**

262.2 Complete draft

262.2.1 The JSC discussed the scope of the review of the complete draft for constituency review. The Chair said that she would confirm with the co-publishers the decision made at the joint JSC/CoP meeting to issue the draft in an early version of the online product. It was agreed that the focus of the review would be on how the different chapters and sections work together. It will be made clear in the cover letter that discussion of comments will be prioritised based on the strategic plan and the objectives and principles. The Chair suggested that the list of priorities used by the Editor in classifying comments on the December 2007 draft of Sections 2-4, 9 could be used. The Chair said that she would draft this part of the cover letter after the meeting so that the JSC could agree as soon as possible.

**Action=Chair; Secretary/Chair (Cover letter for full draft)**

262.3 Barbara Tillett asked who would be sent comments about the online product. The Chair said that she would ask the co-publishers.

**Action=Chair**

262.4 Remaining constituency comments

262.4.1 The JSC agreed that any priority comments from the December 2007 draft of Sections 2-4, 9 not dealt with prior to the constituency review full draft, would be dealt with after the draft is issued, and prior to the first release. The JSC members agreed not to resubmit these comments.

262.4.2 The JSC discussed the list of issues for consideration after the first release of RDA that is maintained by the Secretary. The JSC agreed that if any of these issues were taken forward it would be by means of a constituency proposal.

**263 Next meeting**

263.1 The Chair confirmed that the next meeting would be held in Ottawa from 9-18 November 2008. (Post-meeting note: meeting date and location tentatively changed to 12-20 March 2009 in Chicago.)

**264 Plans for future teleconferences**

264.1 The Chair said that she would work with the JSC to schedule as many teleconferences as possible prior to the release of the full draft for constituency review.

**265 JSC program of work**

265.1 The Program of work (Sub plan B of the RDA project plan) was revised.