To: Joint Steering Committee for Development of RDA

From: Nathalie Schulz, Secretary, JSC

Subject: **Issues deferred until after the first release of RDA**

Included in this list are issues whose resolution the JSC has deferred until after the first release of RDA. These issues will be dealt with after the first release by means of constituency proposals.

The issues are grouped under two headings:

> Individual instructions
> Multiple instructions

Each issue under these headings follows this format:

- Brief description
- Current RDA instruction number (instances where this differs to 5JSC/RDA/Full draft have been indicated)
- AACR2 rule reference (if applicable)
- Reasons why the issue is included in the list, e.g., quotation from a response to a draft and/or reference to a meeting discussion.
- JSC reference (if applicable). This is a reference to a document only available to the JSC, such as a response table used at a meeting, or discussions conducted via a wiki.

Issues deferred until after the first release of RDA

Individual instructions

RDA Chapter 1

Change from single unit to multipart monograph

Current RDA instruction number: 1.6.1

Determine if the change from single unit to multi-part monograph should result in a new description.
JSC reference: Discussed at March 2009 meeting (Line 378)

Transcription of letters or words intended to be read more than once

Current RDA instruction number: 1.7.7
AACR2 rule: 1.1B5

Change instruction for transcription of letters or words intended to be read more than once to transcribe as found and give access to both forms.
JSC reference: Proposed by the LC representative February 2009. Note: the instruction was to transcribe as found in 5JSC/RDA/Part I, but the AACR2 rule was reinstated at the April 2007 meeting (5JSC/M/160.4).

RDA Chapter 2

Transcription

Current RDA instruction number: Chapter 2

Reduce number of elements where transcription is required because some "transcribed elements" (e.g., name of publisher) aren't really transcribed as found now. Or transcribe and allow access point for a controlled name of entity and show role/relationship.
JSC reference: Proposed by the LC representative February 2009

Description of a multipart monograph or serial

Current RDA instruction number: Chapter 2

Add instructions throughout chapter to address situations when the description of a multipart monograph or serial was not based on the first/earliest issue/part and the cataloging agency makes the local decision not to re-describe the resource when

information about earlier issues/parts becomes available. Also affects the scope of Earlier title proper and of Later title proper.
JSC reference: Proposed by the LC representative February and June 2009.

Changes over time

Current RDA instruction number: Chapter 2

Allow repeating of element with dates rather than recording changes in element over time in notes.
JSC reference: Proposed by the LC representative February 2009. Note: the JSC discussed this issue in relation to change in publication, distribution, etc. information (AACR2 rules: 12.4C2, 12.4D2, 12.4G2, 12.7B11.2) in September-October 2008. It was agreed then to defer the issue. At that time, LC suggested that there be sub-types in RDA to identify earlier/later/current place, name, date.

Preferred source of information and collective title

Current RDA instruction number: 2.2.2

From 5JSC/RDA/Full draft/ALA response:
> 2.2.2: add an instruction dealing with cases in which the application of the instructions would lead to a preferred source of information that only gives the titles of individual contents but no collective title, whereas another source (such as a container) does give a collective title. Preference should be given to a source that gives a collective title.

> 2.2.4: There is an apparent conflict with categories a) and b) in that 2.2.2.1 states that accompanying material and containers **are** a part of the resource. In the case of containers, the present instruction introduces the concept of whether or not the container is "an integral part of the resource" which was not present in 2.2.2.1. We would prefer not to make this distinction, but to treat all containers the same. If accompanying material and containers are retained in 2.2.4, we suggest that the latter be given the higher priority. This is based on current practice for describing sound recordings, where the box for a compact disc would be given preference over the accompanying program notes; we anticipate that this order of preference would also work for other types of material.

At the March 2009 meeting the JSC agreed to defer consideration until after the first release (Lines 140 and 150).

Use of square brackets

Current RDA instruction number: 2.2.4
AACR2 rule: 1.0A4

Discussed at October 2007 meeting: consider discontinuing the use of square brackets in specified circumstances (5JSC/M/205.6.1).

Inaccuracies in the title of a serial or integrating resource

Current RDA instruction number: 2.3.1.4
AACR2 rule: 12.1B1

At the April 2007 meeting the JSC agreed to discuss with the ISSN and ISBD communities whether this exception (to not transcribe inaccuracies) can be removed. (5JSC/M/137.12.1)

Names of persons, families, and corporate bodies

Current RDA instruction number: 2.3.1.5
AACR2 rule: 1.1B2

Discussed at October 2007 meeting: consider when a grammatical connection makes a name an integral part of the title (5JSC/M/199.4. See also 5JSC/CILIP/5/ALA response).

Introductory words

Current RDA instruction number: 2.3.1.6
AACR2 rule: 1.1B1

Discussed at October 2007 meeting (5JSC/M/199.3. Discussion of 5JSC/CILIP/5 series). Introductory words are not part of the title but omitting them is not 'taking what you see'.

Use of full form of serial title over an acronym or initialism

Current RDA instruction number: 2.3.2.5
AACR2 rule: 12.1B2

At the April 2007 meeting the JSC agreed to discuss with the ISSN and ISBD communities whether this exception (to choose the full form as the title proper) can be removed. (5JSC/M/137.11.1)
Note: See 5JSC/Chair/13 series.

Other title information for moving image resources

Current RDA instruction number: 2.3.4.6
AACR2 rule: 7.1E2

Expand application to supply a title for moving image resources beyond trailers.
JSC reference: Proposed by the LC representative February 2009

Devised titles for music

Current RDA instruction number: 2.3.2.11.1 (2.3.11.4 in full draft)
AACR2 rule: 5.1B2

Delete the instructions on devised titles for music; the general instruction is adequate.
JSC reference: Proposed by the LC representative February 2009

Designation of edition

Current RDA instruction number: 2.5.2

Merge Designation of edition and Designation of a named revision of an edition (2.5.6).
JSC reference: Proposed by the LC representative February 2009. Discussed at March
2009 meeting (ACOC comment at line 243) - this is an issue to pursue with the ISBD
Review Group.

Use of "issues or parts of a serial"

Current RDA instruction number: 2.6.1.1

Simplify wording from "issues or parts of a serial" to "issues of a serial" throughout
RDA.
JSC reference: Proposed by the LC representative February 2009

Use of "new series" and "second series"

Current RDA instruction number: 2.12.10.4
AACR2 rule: 1.6H3

Revisit identification of "new series" and "second series" as title proper of unnumbered
subseries versus part of the numbering.
JSC reference: Proposed by the LC representative February 2009

RDA Chapter 3

Plates

Current RDA instruction number: 3.4.5.9
AACR2 rule: 2.5B9

There is a conflict between the instruction in the first paragraph to record the number of
leaves or pages of plates "even if there is only one plate" and the final paragraph which
says to disregard unnumbered sequences of plates unless they meet certain criteria.
JSC reference: Discussed by the Editorial Team during the final edit.

Recording extent of three-dimensional forms

Current RDA instruction number: 3.4.6.2

From 5JSC/RDA/Sections 2–4, 9/CILIP response:
> 3.4.5.1.1: (a) a further term Equipment (or Device?) should be added to the list

JSC reference: Revised chapter 3 response table: wiki (August 2008) Line 176. Delay until release of FRSAR

Base material and applied material for sound recordings

Current RDA instruction numbers: 3.6 and 3.7

From 5JSC/RDA/Full draft/BL response:
> 3.7.2: The British Library recommends either generalising or supplementing the instruction to enable information for other types of resources to be recorded. For example, an analogous situation arises with sound recordings. Coatings, such as nitrate or lacquer, may be applied to glass or metal blanks to take a groove.

At the March 2009 meeting the JSC agreed to defer consideration of base material for sound recordings until after the first release (line 491).

Production method for sound recordings

Current RDA instruction number: 3.9

Add instructions for sound recording production.
JSC reference: Proposed by the LC representative February 2009

Production method for manuscripts

Current RDA instruction number: 3.9.2.3

Investigate creating sub-elements for copies (carbon copy, photocopy, transcript) and sub-subelements for transcripts (handwritten, typewritten, printout)
JSC reference: Proposed by the LC representative February 2009

Resolution of video images

Current RDA instruction number: 3.18.1.4 (3.18.1.3 in full draft)

At the March 2009 meeting the JSC agreed to defer consideration of the addition of resolution as an element sub-type of video characteristics (line 505).

Encoding format

Current RDA instruction number: 3.19.3

From 5JSC/RDA/Sections 2–4, 9/CILIP response:
> 3.20.0.5.1: Other communities may have already registered vocabularies for encoding formats, etc., which RDA should try and re-use, rather than re-invent.

JSC reference: Revised chapter 3 response table: wiki (August 2008) Line 313. Note from the ACOC representative in the wiki: "A group looking at whether it is feasible to revive Global Digital Format Registry (GDFR - Harvard University/OCLC) met at IFLA 2008. They will also be in contact with Pronom (National Archives UK) in the hope of having this work done in one place only. When that is sorted out, we should refer out to it, but it isn't ready yet, so leave until after 1st release."

Zoom factor/Enlargement ratio

At the 15 May 2008 teleconference the JSC discussed the following comments from the Editor:
> Does JSC want to add an element or elements for zoom factor and/or enlargement ratio (see line 280 in the Response table for revised chapter 3)? If so, what is the zoom factor? Is it different from enlargement ratio? Would zoom factor and/or enlargement ratio be recorded as a ratio or by using a controlled list of terms? If it is to be recorded using a controlled list of terms, could it be combined with Reduction ratio (i.e., as a newly defined element for Reduction/Enlargement ratio)? Is there any overlap with Scale of still image or three-dimensional form (7.17.1)?

The JSC agreed to defer consideration until after the first release due to issues such as the overlap with the element for Scale, and the lack of a standard for recoding enlargement.

RDA Chapter 4

Missing elements

From 5JSC/RDA/Full draft/ACOC response:
> Should not other 'obtaining' metadata, at the item level, be covered in this chapter, such as call numbers?

At the March 2009 meeting the JSC agreed to defer consideration until after the first release (Line 532).

URLs

Current RDA instruction number: 4.6

From 5JSC/RDA/Full draft/Chair follow-up/6 (German comments):

> We suggest adding the possibility of including a note or explanation with the URL, e.g., full text, table of contents.

At the March 2009 meeting the JSC agreed to defer consideration until after the first release (Line 537).

RDA Chapter 5

Other style manuals

Current RDA instruction number: Chapter 5

Add alternative now in ch. 1 to be able to use another style manual, etc.
JSC reference: Proposed by the LC representative June 2009

RDA Chapter 6

Initial articles

Current RDA instruction number: 6.2.1.7
AACR2 rule: 25.2C

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> 5.5.4. Here and elsewhere, ALA believes that the instruction to omit the initial article is a simplistic solution that conceals the point of the instruction. If the objective is to support sorting on the element following the article, then the instruction should be to encode the title so that the initial article is not used in sorting. Omitting the article as instructed is only one way to accomplish this, and it supports the desired sorting at the expense of other functionality, such as display of the title as found

From 5JSC/RDA/Sections 2–4, 9/CILIP response:
> CILIP again notes that the omission of initial articles can sometimes cause grammatical nonsense in inflected languages (e.g., E.T.A. Hoffman's *Der goldne Topf*: if "Der" were omitted, the phrase should grammatically read *Goldner Topf*).

Conventional collective titles

Current RDA instruction number: 6.2.2.10 (6.2.2.11 in full draft)

Re-examine the need for conventional collective titles.
JSC reference: Proposed by the LC representative February 2009

Form of work

Current RDA instruction number: 6.3.1

Create a controlled list of terms for Form of work.

JSC reference: Proposed by the LC representative February 2009

Place of origin of the work

Current RDA instruction number: 6.5

From 5JSC/RDA/Sections 2–4, 9/LC response:
> 6.6.0.1.1: LC notes that "cultural area" is not covered in ch. 16 as implied by instruction in 6.6.0.3.1 to use ch. 16 for recording the place.

JSC reference: December 2007 draft response table: Line 259 (wiki Priority 2). Cultural area removed from instruction, discuss later if and how it could be reinstated.

Content type

Current RDA instruction number: 6.9 (6.10 in full draft)

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> 6.11.0.3.3. ALA strongly recommends that the use of commonly-used terms be allowed when none of the terms in the list applies.

JSC reference: December 2007 draft response table: Line 74 (wiki Priority 5). Comment in wiki from Editor: Compliance with the RDA/ONIX Framework requires the use of specified terms that are defined in relation to the attributes and values in the Framework. Status: Follow-up maintenance of agreed values with ONIX.

Musical works

Current RDA instruction numbers: Chapter 6

Continue working on the instructions for musical works.
> -- Internationalize the approach to musical works in RDA so as to reduce, if not eliminate, Western bias.
> -- Clarify the situations of music whose medium of performance, form, text, etc., is intended to change with each performance.
> -- Clarify the approach to adaptations and arrangements and when modifications to a musical work results in a new work.
> -- Confirm the status of "suites" in FRBR: parts of works as now in RDA or expressions?
> -- 6.16.0.6.1 (in 5JSC/LC/12/LC follow-up) [6.16.1.6 in full draft]: Remove alternative terms from list.
> -- Replace term "concerto-like works" with "concertos and concerto-like works."

JSC reference: Proposed by the LC representative February 2009. Note: more issues may be added to this list in the future.

Laws, etc.," "Treaties, etc.," and "Protocols, etc."

Current RDA instruction numbers: 6.19 (6.20 in full draft); 6.29.1.33
AACR2 rules: 25.15 and 25.16 (Laws, Treaties, etc.)

From the cover letter for 5JSC/RDA/Sections 2–4, 9:

> The JSC would prefer, if possible, to avoid the use of "etc." in access points constructed using the instructions for collective titles "Laws, etc.," "Treaties, etc.," and "Protocols, etc.". Two solutions have been put forward: (1) no longer use such collective titles, and (2) define "laws," "treaties," and "protocols" to mean the range of resources listed currently in the instructions.

JSC reference: December 2007 draft response table: Line 378 (wiki Priority 2)

Bible

Current RDA instruction numbers: 6.23.2.5
AACR2 rule: 25.18A

At the April 2007 meeting the JSC agreed that after the first release of RDA the remaining proposals in 5JSC/LC/8 would be discussed, including the alternative to substitute a more specific term to represent the Bible depending on the religious context. (5JSC/M/153.5).

Bible – Apocrypha

Current RDA instruction numbers: 6.23.2.6; 6.23.2.9.4
AACR2 rules: 25.18A14; 25.18A5

From 5JSC/RDA/Sections 2–4, 9/ALA response:

> 6.29.2.1 We would also like to see the distinction between Apocryphal books (6.29.2) and the Old Testament Apocrypha (6.29.7.4) made explicit through references and language describing the difference. One respondent suggested that "Apocrypha" be treated as the preferred title of the group of writings that are the subject of 6.29.7.4, but that the writings referred to in 6.29.2 be characterized only as "non-canonical" (with appropriate identification of the canons from which they have been excluded).

JSC reference: December 2007 draft response table: Line 399 (wiki Priority 5)

Bible – Year

Current RDA instruction numbers: 6.24.1.4
AACR2 rule: 25.18A13

From 5JSC/RDA/Sections 2–4, 9/ALA response:

> 6.32.0.4. There seems to be no reason to limit these guidelines to the Bible and parts of the Bible. The alternative seems a reasonable addition to the general instructions on date of expression (6.12); if this were done, 6.32 would not be required at all.

JSC reference: December 2007 draft response table: Line 422 (wiki Priority 2). From wiki discussion: Different results from instructions: 6.12: date or dates; 6.32: only earliest date. Also 6.12 says date of creation but 6.32 is date of publication.

Other distinguishing characteristics of the expression of a religious work

Current RDA instruction numbers: 6.25.1.3
AACR2 rules: 25.18A11 and 25.18A12

From 5JSC/RDA/Sections 2–4, 9/ALA response:

> 6.31.0.3. We believe that there is no compelling reason to limit the guidelines in 6.31.0.4 to the Bible and parts of the Bible; if applicable, they could be extremely useful for all sacred scriptures.

JSC reference: December 2007 draft response table: Line 417 (wiki Priority 2)

Bible – Version

Current RDA instruction number: 6.25.1.4
AACR2 rule: 25.18A11

From 5JSC/RDA/Sections 2–4, 9/ALA response:

> 6.31.0.4.1 and 6.31.0.4.2. We question whether the numerical limitations [e.g., to three or more languages or two translations, etc.] in these instructions are appropriate. In the case of number of languages, this would only apply to a single expression in three or more languages (each expression present in a manifestation being treated separately); we see no reason not to give the version in such a case. Similarly, in the case of translators, the limitation to record only one or two names seems arbitrary.

JSC reference: December 2007 draft response table: Line 418 (wiki Priority 2).

When Composer and Librettist are the same

RDA instruction number: 6.27

This issue was raised during the final edit for the first release:

For works where the composer and librettist are the same, the access point for the libretto and the opera will be the same, e.g.,

Schoenberg, Arnold, 1874-1951. Moses und Aron

To make the access points distinctive, a distinguishing characteristic of the work is added in both cases (instruction 6.27.1.9 for the libretto and instruction 6.28.1.12 for the opera), e.g.,

Schoenberg, Arnold, 1874-1951. Moses und Aron (Opera)
Schoenberg, Arnold, 1874-1951. Moses und Aron (Libretto)

Following the new 6.27.4.2 the variant access for the Libretto would then be:

Schoenberg, Arnold, 1874-1951. Moses und Aron (Opera). Libretto

The issue for consideration after the first release is whether qualification of the access point for the opera is desirable, as it would be a change from AACR2 naming practices. Such a change would affect all of Richard Wagner's operas, for example.

If the JSC decides not to qualify the access point for the opera, that would create a different issue of the variant access point for a libretto written by the composer being very similar to the authorized access point:

Authorized access point:
Schoenberg, Arnold, 1874-1951. Moses und Aron (Libretto)

Variant access point:
Schoenberg, Arnold, 1874-1951. Moses und Aron. Libretto

Use of "Lyrics" and "Texts"

RDA instruction number: new 6.27.4.2

During the final edit, Adam Schiff raised the following question about a new example:
> John, Elton. Songs. Texts. Selections
> Authorized access point for the compilation: Taupin, Bernie. Lyrics. Selections
>
> In that example the term "Texts" is used in the variant access point, while the term "Lyrics" is used in the authorized access point. I don't understand why they would be different. Shouldn't "Lyrics" be used in both? It's not clear to me whether the two terms are equivalent. Are there instances where a text to a musical work that isn't a libretto would not be able to be called lyrics? If indeed they really have different meanings, then in 6.27.4.2.1 c) I would think Lyrics needs to be added.

Kathy Glennan provided some additional information:
> I can see how we came up with the current example (the use of "texts" in the variant access point parallels AACR2 practice in creating the uniform title; using "lyrics" must have seemed more representational when we proposed the new authorized access point for Taupin).
>
> In AACR2 practice, using "texts" as part of the uniform title for a selection of texts from Elton John's songs is relatively unambiguous, since he is known as a composer/performer. However, following RDA and using "texts" to represent a selection of song texts by someone primarily known as a writer creates more ambiguity -- texts of what?

Presumably the author of the words wrote other works that could have this element as part of the authorized access point for a compilation. The use of "lyrics" is clearer, but I don't think that "texts" and "lyrics" are synonymous. The 3rd definition of "lyric" in the *New Harvard Dictionary of Music* says, "Lyrics [pl.]. The words of a popular song or number from a musical comedy." Thus, a compilation of poetry by Friedrich Ruckert used as song texts by Mahler would not include "lyrics" in the authorized access point. However, this raises a new question -- in that made-up example, would the authorized access point use "Poems" instead of "Texts"?

I would like to note that it was quite difficult to find the Elton John/Bernie Taupin example, which was part of the joint ALA/CCC proposals for Chapter 6. I specifically looked for a compilation of song texts by a single writer set by a single composer, and this was about all I found. Not surprisingly, it is much more common for a publication to compile song texts associated with a single composer than with a single writer.

The JSC Chair said that the issue would need to be dealt with after the first release.

Reports of one court

Current RDA instruction number: 6.29.1.21
AACR2 rule: 21.36A1
From 5JSC/RDA/Sections 2–4, 9/ALA response:

> 6.23.1.20. Based on recommendations from the American Association of Law Libraries (AALL), ALA believes that the instructions for court reports are in need of revision. They reflect historical practice that would be very difficult for contemporary catalogers to follow, since it requires knowledge of the "accepted legal citation practice in the country where the court is located." Whether or not the reports are issued by or under the authority of the court is also difficult to determine (the same publisher may be authorized in some years and not authorized in other years). We believe that the court should always be the primary access point, since reports are the decisions of the court, and the decisions are created by the court. AALL made this recommendation in response to the call in 2005 for revision to the rules for special materials in Chapter 21 of AACR2. We propose the following substitution for the current 6.23.1.20 (the remainder of the instruction would be deleted):

6.23.1.20	Reports of one court
6.23.1.20.1	➢ For law reports of one court, construct the preferred access point representing the work ~~as instructed below~~ <u>by combining:</u>
	a) the preferred access point for the court, formulated according to the instructions given under <u>11.1.1</u>
	b) the preferred title for the reports, formulated according to the instructions given under <u>6.24</u>.

> On the other hand, ALA is sympathetic to the significance of this change and would support a decision to retain the instructions in the current draft and revisit the issue after the initial release of RDA.

JSC reference: December 2007 draft response table: Line 372 (wiki Priority 2)

Date of signing of a treaty

Current RDA instruction numbers: 6.29.1.33, 6.29.3.2

During the final edit, Adam Schiff raised the following issue:

> 6.29.1.33 says on p. 245: "If the access point for a compilation of treaties, etc., is constructed using the collective name for the treaties, etc. ... add the year, earlier year, or earliest year of signing (see 6.21.3)." and on p. 247: "If the access point for a single treaty is constructed using the name by which the treaty is known, add the year, earlier year, or earliest year of signing (see 6.21.3)."

> And 6.29.3.2 also has an instruction to add to the title for a treaty, etc. the year of signing (I also note it does not say "year, earlier year, or earliest year of signing" like the instructions above do)

> When you go to 6.21.3, there is no provision to record just a year by itself for the date of signing of a treaty. 6.21.3.3 says to record the date in the form: year, name of month, number of the day. If only a year is needed in either authorized or variant access points, can it be pulled out of 6.21.3.3? Or does there need to be an exception of some sort to record just a year in that element? There will be many instances where the complete date of signing is used in the authorized access point but only the year in some of the variant access points.

The Editor sent the following response to the Editorial Team:

> My response would be that in this case, as in others, what gets added in an authorized or variant access point may differ from what is recorded in the RDA element that corresponds to that addition, simply because the idiosyncrasies of access point construction have been retained in the RDA guidelines on constructing access points, whereas an attempt has been made to normalize the way an element is recorded as an element per se. I really don't think we can try to accommodate all of those idiosyncrasies by adding exceptions to the instructions on recording elements. Certainly not at this stage, anyway.

> If you agree, I will leave the instructions as they are and assume that any manipulation or suppression of the data recorded in an RDA element would be done by the cataloguer, or by a program, when that element is used as an addition in an access point and the instructions on constructing the access point differ from what is recorded in the corresponding element.

> JSC may want to add this to a list of issues to be addressed after the first release.

Expressions of religious works

Current RDA instruction numbers: 6.30.3
AACR2 rules: 25.18A10; 25.18A11; 25.18A12; 25.18A13

From 5JSC/RDA/Sections 2–4, 9/ALA response:

> 6.28.3. ALA suggests that it would be useful to generalize these instructions to include all sacred scriptures. One respondent indicated that his institution has had to adapt these instructions to cover the Book of Mormon and its various expressions, and notes that this work has all the characteristics of the Bible (complex publication history, multiple expressions in innumerable languages, facsimile reproductions, etc.); it is surely not unique among non-Biblical sacred scriptures in this regard.

JSC reference: December 2007 draft response table: Line 392 (wiki Priority 2)

Catholic liturgical works

Current RDA instruction number: 6.30.3.5; 6.23.2.8
AACR2 rule: 25.20B1

From 5JSC/RDA/Sections 2–4, 9/CCC response:
> 6.28.3.4.3: CCC notes that there is a discrepancy between AACR2 (25.20B1)/RDA (6.28.3.4.3 and 6.29.5.2.1) and present practice. Is it time to reconcile this discrepancy? We recommend that a review of the instructions and examples be considered.

JSC reference: December 2007 draft response table: Line 395, 402 (wiki Priority 2)

RDA Chapter 7

Nature of the content

Current RDA instruction number: 7.2

Consider overlap between Nature of the content with genre/form terms, Form of Work and Content type.
JSC reference: Proposed by the LC representative February 2009

Intended audience

Current RDA instruction number: 7.7

At the April 2008 meeting the JSC agreed to consider in the future whether or not to develop a list of values for intended audience, or to refer to other lists (5JSC/M/239.9.1)

Type of illustrations

Current RDA instruction number: 7.15
AACR2 rule: 2.5C

From 5JSC/RDA/Part A/Chapter 3/Rev/ALA response:
> 4.9 Illustrative content
> Ironically, the scope statement in 4.9.0.1 does not limit illustrations to graphic images; audio and video clips might be considered to "illustrate" an audio or video lecture, for example. Should this element be limited to the sort of graphic illustrative matter typically appearing in printed texts (which was the origin of this element in AACR chapter 2) or should a broader approach to illustrative matter be taken? If the scope is to be narrow, the definition in 4.9.0.1 needs to be revised.

Discussed at April 2008 meeting (5JSC/M/239.34). There is no limitation on the scope of the element, but ALA may wish to extend the list at 7.15.1.3 after the first release.

Illustrative content

Current RDA instruction number: 7.15

Merge Illustrative content with Supplementary content.
JSC reference: Proposed by the LC representative February 2009

Additional scale information

Current RDA instruction number: 7.25.5.3, 2nd paragraph
AACR2 rule: 3.3B2

Remove the requirement to give the information in quotation marks.
JSC reference: Proposed by the LC representative February 2009

Other details of cartographic content

Current RDA instruction number: 7.27.1.3

Because coordinates are attributes of a work, consider if information about coordinates should be deleted here and covered under the Work section of the chapter.
JSC reference: Proposed by the LC representative February 2009

RDA Chapter 8

Other style manual

Current RDA instruction number: Chapter 8

Add alternative now in ch. 1 to be able to use another style manual, etc.

JSC reference: Proposed by the LC representative June 2009

Spacing of initials and acronyms

Current RDA instruction number: 8.5.6
AACR2 rule: 24.1A

From 5JSC/RDA/Sections 2–4, 9/ALA response:

> 8.5.5. ALA sees no compelling for reason for RDA to follow the current AACR2
> approach of having separate conventions for personal vs. corporate names when it comes
> to spacing of initials and acronyms. Although we are not convinced that such spacing
> issues matter, we recommend a consistent approach. We have no strong preference
> between the alternatives.

JSC reference: December 2007 draft response table: Line 464 (wiki Priority 2)

RDA Chapter 9

Change of name

Current RDA instruction number: 9.2.2.7
AACR2 rule: 22.2C

From 5JSC/RDA/Sections 2–4, 9/ALA response:

> 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.

Discussed at April 2008 meeting (5JSC/M/240.6), the JSC agreed that this issue could be
pursued by ALA after the first release.

First part of the name is the surname

Current RDA instruction number: 9.2.2.9
AACR2 rule: 22.4B2

From the cover letter for 5JSC/RDA/Sections 2–4, 9:

> AACR2 rule 22.4B2 (RDA 9.2.5.1.3) contains this provision: "If the first element is a
> surname, follow it by a comma." This means that a name such as "Chiang Kai-shek"
> where "Chiang" is the surname is recorded as "Chiang, Kai-shek." The JSC will consider
> whether to remove the instruction on use of a comma for such names.

Note: discussed at October 2007 meeting (5JSC/M/183.17.1)

Surname as first element

Current RDA instruction number: 9.2.2.9
AACR2 rule: 22.5A1

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> 9.2.5.1.3. Many ALA respondents felt that the need to determine an initial element in the name for sorting purposes was the result of limitations on our encoding schemas. They feel that this is an opportunity to define data elements with sufficient granularity to support a variety of sorting and display options.

JSC reference: December 2007 draft response table: Line 531 and 532 (wiki Priority 2). From status column for line 532: Preferred name of person as a single element (forename, surname, etc., not defined as separate elements or sub-elements). Defer issue until after first release.

Name that consists of a phrase/Additions to names

Current RDA instruction numbers: 9.2.2.9; 9.2.2.22; 9.2.2.23
AACR2 rule: 22.11A; 22.11B; 22.15A;

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> 9.2.5.4, 9.2.18.2 and 9.2.19.2. The distinction between these situations has never been clear. Making the distinction violates the principles of Consistency and Common usage. ALA urges that these cases be treated the same; we prefer to record the name in direct order.

JSC reference: December 2007 draft response table: Line 538 (wiki Priority 2)

Part of the name treated as a surname

Current RDA instruction number: 9.2.2.9.2
AACR2 rule: 22.5B1

Re-evaluate treating names known not to be surnames as surnames.
JSC reference: Proposed by the LC representative February 2009

Persons known by a surname only

Current RDA instruction number: 9.2.2.9.3
AACR2 rule: 22.15A

From the cover letter for 5JSC/RDA/Sections 2–4, 9:
> RDA 9.2.5.4.1. The JSC will consider whether it is more in line with user behavior if names consisting of a surname and a term of address were formulated in direct order, e.g., "Miss Read" instead of the current "Read, Miss".

From 5JSC/RDA/Sections 2–4, 9/BL response:
> 9.2.5.4.1
> Printed reference works, in common with AACR2, index Miss Reed under surname. In support of the proposed change, Wikipedia enters "Miss Read" in direct order. Dr Seuss is retrieved under either name. Phrase searching on Amazon for Miss Read or Dr Seuss works adequately and, in the former case, is more precise than searching for just "Read". Abbe Deidier is retrieved on Amazon.fr as a phrase or by surname only. On balance there seems little justification for the change. Access control entries should be provided for either form, to support either approach.

Note: discussed at October 2007 meeting (5JSC/M/183.19.1)

Word or phrase included in the name

Current RDA instruction number: 9.2.2.18
AACR2 rule: 22.8A1

From the cover letter for 5JSC/RDA/Sections 2–4, 9:
> RDA 9.2.14.1.3. AACR2 22.8A1 says a word or phrase denoting place of origin, domicile, occupation, or other characteristics that are commonly associated with a name should be preceded by a comma if the word or phrase is included in the name, e.g. "John, the Baptist". The JSC will consider whether to remove the instruction on use of a comma.

Note: discussed at October 2007 meeting (5JSC/M/183.25.1) Note from the LC representative: The Chicago Manual of Style, 15th ed., sections 5.29 and 6.43 do not use commas for such appositives that are restrictive, that is, essential to the noun they belong to.

Initial articles in phrases used as the names of persons

Current RDA instruction numbers: 9.2.2.25; 9.2.2.26
AACR2 rule: 22.11D

From the cover letter for 5JSC/RDA/Sections 2–4, 9:
> RDA 9.2.21.2, 9.2.22.2. Initial articles in phrases used as the names of persons. The JSC will further discuss whether these instructions can be revised to allow the retention of initial articles.

From 5JSC/RDA/Sections 2–4, 9/BL response:
> 9.2.21.2 9.2.22.2
> Omission of the initial article may create a nonsensical access point for phrases in reflexive languages. Retention of the initial article will inhibit browsing under the first significant word. Changing the current instructions will necessitate backfile clean up.
>
> The principles on which RDA is based argue strongly in favour of retaining the initial article. There are significant practical obstacles to be overcome. The BL view is that the RDA instruction should be to retain the initial article, but an alternative instruction should sanction its deletion. This gives a clear signal of the direction in which RDA is travelling.

Language and script for Alternative linguistic form of name

Current RDA instruction number: 9.2.3.9

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> 9.3.6. ALA recommends that here and in the similar sections for other types of entities the language or script should be recorded. That would allow a computer to select those that are appropriate for a given user. This would be *data about data*, and may need to be added to a list to be developed after the initial release of RDA.

JSC reference: December 2007 draft response table: Line 614 (wiki Priority 2). Comment in wiki from Editor: Encoding script for a literal value may be a problem for RDF-compliant schema.

Other variant name

Current RDA instruction number: 9.2.3.10

From 5JSC/RDA/Sections 2–4, 9/LC response:
> 9.3.7.3: LC asks why the different forms are grouped together instead of being handled as separate relationships.

JSC reference: December 2007 draft response table: Line 619 (wiki Priority 5). Comment from LC in wiki: Perhaps another appendix needed (now/later?) to show relationships per FRAD between preferred and variant names. Machine applications could find such info useful.

Recording of month and day in date of birth

Current RDA instruction number: 9.3.2.3
AACR2 rule: 22.17

From 5JSC/RDA/Full draft/ALA response:
> 9.3.2.3: No reason to limit recording of month and day to when the name is identical to that of another. Move all such artificial limitations to the instructions on constructing access points.

At the March 2009 meeting the JSC agreed to defer consideration until after the first release (Line 785). It was noted that there are problems with removing the restriction because use of the elements in access points.

Other persons of religious vocation/Saints

Current RDA instruction numbers: 9.4.1.8, 9.6.1.4
AACR2 rules: 22.16D1 and 22.13A

From the cover letter for 5JSC/RDA/Sections 2–4, 9:

According to AACR2 rule 22.16D1 (RDA 9.5.0.8.1), a title or term of address for a person of religious vocation is to be treated as an addition to the name, not as a part of the name. Similarly, according to AACR2 rule 22.13A (RDA 9.7.0.4.1), the term "Saint" is to be treated as a designation associated with the name, not as a part of the name. The JSC will consider whether these should be considered part of the name when the name consists only of a given name, to be consistent with the treatment of other terms associated with persons known by a given name (RDA 9.2.5).

Note: discussed at October 2007 meeting (5JSC/M/183.33.1)

Field of Activity and Profession/Occupation

Current RDA instruction numbers: 9.15 and 9.16

From 5JSC/RDA/Full draft/ALA response:

9.15 and 9.16: The distinction between Field of Activity and Profession/Occupation is not sufficiently clear. Our sense is that a Field of Activity is one that a person engages in apart from his or her Profession or Occupation. We suggest adding this language to the scope of Field of Activity. We also suggest that the section on Profession or Occupation come before the section on Field of Activity.

Proposed by the LC representative February 2009:

9.15: Merge Field of activity of the person with Profession or occupation (9.16).

At the March 2009 meeting the JSC agreed to defer consideration until after the first release and to consult with FRAD (line 792).

RDA Chapter 10

Family names not based on surnames

Current RDA instruction number: chapter 10

From 5JSC/Restricted/ACOC rep-CCC rep/1:

In 5JSC/LC/6/ALA response "5. Naming conventions" ALA noted:

"Naming conventions vary among different cultures and time periods. ALA recommends that the proposed rules be expanded to address how to construct family names in the following situations: places in which surnames are not used (e.g., Iceland and much of Southeast Asia) and places in which surnames are used but family members do not necessarily share the same surname (e.g., in ancient Scottish and modern American families, the wife may keep her family name after marriage rather than take her husband's family name; in Sweden, when patronymics were in use, surnames changed from generation to generation). "

The JSC will need to consider whether the general instructions on choosing the preferred name provide sufficient guidance in these situations, or whether specific instructions are required.

Note: Decision to defer made at October 2007 meeting (5JSC/M/184.13.1)

Estate or house names to distinguish names of families

Current RDA instruction numbers: chapter 10, chapter 16

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> 10.6.0.3.1. ALA notes that estate or house names might also be useful for English gentry and minor European nobility (e.g., "The Park Hill Smiths : a family history for an Australian family." The number of Smith families in Australia or even Queensland is immense).

JSC reference: December 2007 draft response table: Line 720 (wiki Priority 2). Discussed at conference call 28 August 2008: "The JSC agreed to add this to the list for consideration after the first release of RDA. Estate or house names would best be handled by a reference to chapter 16, but chapter 16 does not currently cover locations such as these."

Controlled list of values for Type of family

Current RDA instruction number: 10.3

From 5JSC/RDA/Sections 2–4, 9/ACOC response:
> ACOC does not have any comments on the specific terms included. Given that the inclusion of family names is a new feature of RDA, we would like these terms to be defined in the Glossary for first release. We await the responses of other constituencies with interest. 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.

At the April 2008 meeting the JSC agreed that there would be no controlled list for the first release (5JSC/M/240.11.1). Note: there will be a need to identify appropriate stakeholders in the archival community, etc., to consult about this issue.

RDA Chapter 11

Separate instructions for government bodies and other corporate bodies

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> Chapter 11
> General comment. Having separate instructions for government bodies and other corporate bodies introduces both redundancy and complexity. Although the distinction is carried forward from AACR2, ALA believes that it is time to eliminate the distinction and to merge these two groups of instructions. If there is interest in pursuing this recommendation, ALA is willing to make a proposal.

Discussed at April 2008 meeting (5JSC/M/240.12), the JSC agreed that this issue could be pursued by ALA after the first release.

Events

Current RDA instruction number: 11.0

Consider different approach to events (they are a separate Group 3 entity).
JSC reference: Proposed by the LC representative February 2009

Ancient and international bodies

Current RDA instruction number: 11.2.2.5.4
AACR2 rule: 24.3C2

Discussed at the October 2007 meeting: the caption could be misread as implying that bodies covered by the instruction are both ancient and international (5JSC/M/185.11.1).

Autocephalous Patriarchates, Archdiocese, etc.

Current RDA instruction number: 11.2.2.5.4
AACR2 rule: 24.3C3

Remove the exception for Autocephalous Patriarchates, Archdiocese, etc.
JSC reference: Proposed by the LC representative February 2009

Initial articles

Current RDA instruction number: 11.2.2.8
AACR2 rule: 24.5A1

From the cover letter for 5JSC/RDA/Sections 2–4, 9:
> RDA 11.2.0.6 Initial articles used in the names of corporate bodies. The JSC will further discuss whether these instructions can be revised to allow the retention of initial articles.

Note: discussed at October 2007 meeting (5JSC/M/185.7.1)

Citations of honours

Current RDA instruction numbers: 11.2.2.9
AACR2 rule: 24.5B1

From 5JSC/RDA/Sections 2–4, 9/CC response:
> 11.2.0.7.1: The only examples of this instruction are Russian bodies (also in AACR2 at 24.5B1). Does this situation only occur with Russian bodies? It might be helpful to include either an explanatory text of the terms or, if appropriate, give an English example.

JSC reference: December 2007 draft response table: Line 774 (wiki Priority 5). Issue raised in wiki discussion: whether the awarding of "Royal" status to an organization is the same in all places. Note: an English example has been added.

Terms indicating incorporation

Current RDA instruction number: 11.2.2.10
AACR2 rule: 24.5C1-2

From the cover letter for 5JSC/RDA/Sections 2–4, 9:
> AACR2 24.5C2 (RDA 11.2.0.8.2) requires transposition of corporate names that include an adjectival term or abbreviation indicating incorporation at the beginning of the name. However, there is a question as to whether agencies cataloguing in languages other than English would transpose such terms. The JSC wants to re-consider both this instruction and 24.5C1 (RDA 11.2.0.8.1), which says to remove such terms unless integral to the name.

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> 11.2.0.8.1. One respondent recommended changing the AACR2 rule and always including terms of incorporation, because of foreign language terms not always known or understood to be terms of incorporation.

From 5JSC/RDA/Sections 2–4, 9/BL response:
> 11.2.0.8.1-2
> Terms of incorporation.
> There seems no compelling reason to omit terms of incorporation from the names of corporate bodies. The abbreviation is usually associated with the company name. However, defining a specific element or sub-element would enable greater flexibility in display. Including the term of incorporation in the name, may result in changes to access points when terms of incorporation change, as they did for PLCs [public limited companies] in the UK in 1980 and Ireland in 1983.

JSC reference: December 2007 draft response table: Line 776 (wiki Priority 2). Discussed at October 2007 meeting (5JSC/M/185.6.1)

Transliterated names for corporate bodies

Current RDA instruction numbers: 11.2.2.12, 9.2.2.5
AACR2 rule: 24.1B, footnote 4, 22.3C2, footnote 4

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> 11.2.0.10.2. It is not clear if any criteria for predominant usage should apply to the choice of transliterated names for corporate bodies. ALA suggests that the instructions for corporate body names at 11.2.0.10.2 be consistent with those for personal names at 9.3.1.3b

JSC reference: December 2007 draft response table: Line 784 (wiki Priority 2). Discussed at conference call 28 August 2008: "The JSC decided to retain the current instructions (from AACR2), as the instructions on language should also be considered."

Subordinate bodies

Current RDA instruction numbers: 11.2.2.14
AACR2 rule: 24.13A

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> 11.2.3.2. Some ALA commentators suggested the need for a list of terms fitting Types 1 and 2; knowing the appropriate terms in various languages is necessary for consistent application. Such lists are currently provided in an LCRI 24.13 Type 2.

JSC reference: December 2007 draft response table: Line 803 (wiki Priority 5). From wiki: "note that LC and others have indicated desire to revise subordinate bodies after first release. (Also note only some languages represented in LCRI.)"

Joint Committees

Current RDA instruction numbers: 11.2.2.16
AACR2 rule: 24.15B

From 5JSC/RDA/Sections 2–4, 9/CCC response:
> 11.2.4.3: Extend to joint government bodies. Cover either as a separate instruction at 11.2.6 or a reference be made from 11.2.6 to 11.2.4.3

JSC reference: December 2007 draft response table: Line 812 (wiki Priority 2). Discussed at conference call 28 August 2008: "The JSC agreed to add this to the list for consideration after the first release of RDA."

Ruling executive bodies

Current RDA instruction number: 11.2.2

From 5JSC/RDA/Full draft/ALA response:
> While there are instructions in chapter 11 for formulating access points for heads of state and chief executive (11.2.2.19 Type 9 and 11.2.2.21), there are no instructions for how to formulate the access point for a ruling executive body. This is an omission carried over from AACR2 that needs to be rectified. RDA should have instructions on how to record the name of a ruling executive body. Below is the proposed text for these instructions.

At the March 2009 meeting the JSC acknowledged there is a gap and agreed that it was willing to consider a formal proposal after first release (line 827).

Heads of state and Heads of government

Current RDA instruction number: 11.2.2.21
AACR2 rules: 24.20B; 24.20C

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> 11.2.7.2 and 11.2.7.3. Although AACR2 included separate rules for recording the titles of Heads of state and Heads of government, the principle behind this distinction is unclear. ALA recommends that the instructions for these two kinds of officials be consistent, particularly regarding choice of language; we prefer the language of the jurisdiction. ALA would even support combining the two instructions, and some commentators would support merging all of the instructions for officials.

JSC reference: December 2007 draft response table: Line 818 (wiki Priority 2)

Subcommittees of the United States Congress

Current RDA instruction number: 11.2.2.22.3
AACR2 rule: 24.21C

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> 11.2.8.3. ALA does not believe that this "exception" for subcommittees of the United States Congress is appropriate. Either all subcommittees should be treated in this way, or all subcommittees should be named following 11.2.8.1.

From 5JSC/RDA/Sections 2–4, 9/CCC response:
> 11.2.8.3—11.2.8.4 (p. 11-46): We do not feel that these instructions are necessary and suggest that they be deleted.

JSC reference: December 2007 draft response table: Line 821 (wiki Priority 4). Discussed at conference call 28 August 2008: "The JSC decided to retain the instruction (now at 11.2.1.22c) as it is used by the Library of Congress, and preferred names created following the instruction will be included in shared records. To add to the post first release list: the possible extension of the instruction to other countries."

Qualifiers for courts

Current RDA instruction number: 11.2.2.24.1
AACR2 rule: 24.23A1

Change to use standardized form rather than conventionalized form of the place as a qualifier for name of a court.
JSC reference: Proposed by the LC representative February 2009

Armed forces

Current RDA instruction number: 11.2.2.25.1
AACR2 rule: 24.24

Resolve discrepancies in instructions that result in names such as Australian Army
Psychology Corps and South African Army Service Corps being established differently.
JSC reference: Proposed by the LC representative February 2009

Change of name of jurisdiction

Current RDA instruction number: 11.3.3.4
AACR2 rule: 24.4C4

Handle change of name of jurisdiction or locality as a name change.
JSC reference: Proposed by the LC representative February 2009

RDA Chapter 16

Access points to represent places

Consider whether to expand RDA chapter 16 beyond the scope of AACR2 chapter 23, to
cover access points for places *per se* (not just place names used in access points for
corporate bodies). Discussed at October 2007 meeting (5JSC/M/186.3.1).

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> Chapter 16. General comment on the scope of the chapter. Place names have always been
> a problem in cataloging because generally the same name identifies both the geographic
> area itself and the corporate entity with jurisdictional or administrative responsibility for
> the geographic area. This issue relates not only to place names identifying governments at
> all levels, but also to many other corporate bodies that control a geographic area, such as
> a university campus, an airport, an amusement park, a cemetery, etc.
>
> The development of RDA presents an opportunity to resolve this issue. ALA would
> welcome an effort to expand the scope of the chapter to deal with all geospatially-defined
> entities. The availability of a single comprehensive set of instructions on place names
> would fill a long-standing need. It would also provide a context in which to resolve the
> issue described above, probably through the provision of an elements (data about data)
> that would identify the appropriate usage of the place name.

Discussed at April 2008 meeting (5JSC/M/241.2), agreed to defer.

Additional uses for place names

Current RDA instruction number: 16.2.2.4, 4th paragraph

Add missing uses for place name (e.g., title of works).
JSC reference: Proposed by the LC representative February 2009

Places in Australia, Canada, Malaysia, the United States, the U.S.S.R., or Yugoslavia

Current RDA instruction number: 16.2.2.9
AACR2 rule: 23.4C1

From the cover letter for 5JSC/RDA/Sections 2–4, 9:
> AACR2 23.4C1 (RDA 16.2.4). Places in Australia, Canada, Malaysia, the United States, the U.S.S.R., and Yugoslavia are currently treated differently from other places. The JSC has agreed that the ultimate goal will be to make these provisions consistent. Two options for promoting consistency will be examined after the first release of RDA: applying these instructions to other federated states, or no longer having an exception for these places.

Note: Discussed at October 2007 meeting (5JSC/M/186.10.1)

Identifiers for places

Current RDA instruction number: 16.3 (16.5 in full draft)

At the April 2008 meeting (5JSC/M/241.4), the JSC agreed to defer this issue until decisions are made on the scope of the chapter.

RDA Chapter 19

Corporate bodies as creators

Current RDA instruction number: 19.2.1.1
AACR2 rule: 21.1B2

Discussed at October 2007 meeting: Consider whether a corporate body as creator should be determined on exactly the same basis as for persons (5JSC/M/204.6.3)

Jurisdiction governed and Issuing agency

Current RDA instruction number: 19.3.2.2

Consider merging Jurisdiction governed by a law, regulation, etc., with Issuing agency or agent (19.3.2.3).
JSC reference: Proposed by the LC representative February 2009

RDA Appendices

Appendix A – Capitalization

Appendix as a whole
Remove appendix from RDA.
JSC reference: Proposed by the LC representative February 2009

Unusual capitalization
A.2.1: Expand scope to names of persons and families by deleting "corporate" in "For corporate names with unusual capitalization" because personal and family names could also have unusual capitalization.
JSC reference: Proposed by the LC representative February 2009

Appendix B - Abbreviations

Language scope
Expand language scope beyond those covered now in B.7-B.10.
JSC reference: Proposed by the LC representative February 2009

B.11 Names of Certain Countries, States, Provinces, Territories, etc.
Consider removal of abbreviations for certain countries, states, provinces, territories, etc. (April 2008 meeting 5JSC/M/258.5.10)

Appendix C – Initial articles

Additions
At the October 2006 meeting the JSC agreed to call for additions to the appendix on initial articles after the first release of RDA (5JSC/M/111.6).

Dialects
From the CILIP representative (email 8 November 2007):
> App C covers situations in which dialects use the same article(s) as their "parent" language. But with the solitary exception of Shetland I don't think we've ever attempted to deal with dialects which have articles that are different from those of their parent languages. The UK alone can muster a number of such beasts, and I doubt we're alone. But the first question would be how far we might want to go in this area (if at all - but then Shetland would be a curious exception).

Appendix F – Additional instructions on names of persons

AACR2 rules 22.21-28; 22.9A1; 22.9B1; 22.7A; 22.5D1

Consider whether this appendix can be replaced by a reference to *Names of persons* (cf. replacement of detailed instructions on compound surnames).

Note: discussed at October 2007 meeting (5JSC/M/183.3.1). At the March 2009 meeting the JSC confirmed that this issue would be considered after the first release (line 769).

Appendix G – Titles of Nobility, terms of rank

5JSC/RDA/Full draft contained the following statements in Appendix G:

> Germany
> In Germany, the inclusion of titles of nobility or terms of rank in legal names has been illegal since 1918.
>
> Sweden
> In Sweden, titles of nobility and terms of rank are no longer considered to be part of the preferred name.

The JSC reluctantly decided to remove these provisions for the first release. The JSC was concerned that users would find the instructions ambiguous if Appendix G implies that terms or ranks of nobility should be excluded from German or Swedish names as there are difficulties in reconciling this practice with the instructions in Chapter 9.

Appendix H – Dates in the Christian calendar

AACR2 rule: 22.17A

From the cover letter for 5JSC/RDA/Sections 2–4, 9:
> RDA 9.4. The JSC will re-consider the use of "B.C." and "A.D." with dates. Although it would be more culturally sensitive to use "B.C.E." and "C.E.", dates would still reflect the Christian calendar. The wider issues need to be considered.

Note: discussed at October 2007 meeting (5JSC/M/183.27.1)

Appendix J - Relationship designators: Relationships between works, expressions, manifestations, and items

When FRSAD is available review J.2.3 Descriptive work relationships, J.3.3 Descriptive expression relationships, J.4.3 Descriptive manifestation relationships, and J.5.3

Descriptive item relationships for overlap with subject relationships. (March 2009 meeting – Line J26)

Appendix K – Relationship designators: Relationships between persons, families, and corporate bodies

From 5JSC/RDA/Full draft/ALA response:
> Most of the terms can apply to all three types of entities, yet this has not always been done.
> Although relationships are supposed to be reciprocal, this has not always been done.

At the March 2009 meeting the JSC agreed to defer consideration until after the first release (Lines 1097 and 1098). All of Appendix K is provisional.

RDA Glossary

From 5JSC/RDA/Full draft/ALA response:
> Computer: Make clear that defining as Media Type. In fact, it might be useful to include an indication (phrase or code or icon) to indicate that the term being defined is an element, a sub-element, an element sub-type, or a value.

At the March 2009 meeting the JSC agreed to defer consideration until after the first release (Line 1141).

Multiple instructions

Instructions on sources of information

From 5JSC/RDA/Full draft/LC response:
> LC recommends deleting general instructions on sources for groups of elements on the principle that an instruction about sources of information should be given only for specific elements.

At the March 2009 meeting the JSC agreed to defer consideration until after the first release (5JSC/M/275.2.7).

Repetition of text in instructions

From 5JSC/RDA/Full draft/ACOC response:
> There are many cases where identical or nearly identical text has been repeated under different instructions. Examples include instructions relating to facsimiles and reproductions, data elements in more than one language or script, and designations of first and last issues or parts.

At the March 2009 meeting the JSC agreed to some changes, but noted that any more systematic changes would need to wait. (5JSC/M/275.2.8).

Repetition of element name

From 5JSC/RDA/Full draft/ACOC response:
> Rather than repeating the element name in the instructions, it should be possible to just say "this element"

At the March 2009 meeting the JSC agreed to defer consideration until after the first release due to the amount of work involved (5JSC/M/275.2.9).

Non-Latin Script examples

From 5JSC/RDA/Full draft/ALA response:
> Internationalization remains an incompletely fulfilled promise of RDA, which is not fully consistent in its inclusion of both general and specific instructions relating to language and script. Furthermore, examples in non-Latin alphabets have not been sufficiently included, particularly in Section 1.

After the March 2009 meeting the JSC agreed to defer systematic inclusion of non-Latin script examples until after the first release.

Use of ISO standards

In responses to the full draft, France, Spain, and Sweden had requested more use of ISO standards, e.g., for dates, countries, currency. At the March 2009 meeting the JSC agreed to defer consideration until after the first release (5JSC/M/275.2.25).

Finding of objects

From the ACOC rep (based on email sent on 28 August 2007):
> Terminology related to the finding of objects.
>
> Finding of objects (M/138.5.3)
> "JSC discussed the issue and decided that if it could be done easily, provision for events relating to the finding of objects would be included in RDA. The Chair said that she would undertake to research the terminology."
>
> There are a number of relevant standards. Extracts from REACH (Element Set for Shared Description of Museum Objects - REACH identified the core fields shared among the most important standards for museum data), CIDOC and Spectrum are in the attached document. Although these standards do say there should be elements for who/where/when the object was discovered - they do not specify how to record that information. CIDOC gives place/date person etc and type of association - and that isn't how we handle similar things in RDA.
>
> It may be preferable after all to delay the introduction of instructions until after RDA's initial release. A thorough-going review of data elements in museum standards for descriptions - perhaps done collaboratively with that sector - seems desirable. Also, FRAD has issues related to the definition and use of the terms "item" and "object" which will affect these instructions – and it is uncertain whether/when they will be resolved.

At the October 2007 meeting the JSC agreed to defer consideration until after the first release (5JSC/M/Restricted/211.2.1). Note: there will be a need to identify appropriate stakeholders in the museum community, etc., to consult about this issue.

Definition of "expression"

Current RDA instruction numbers: 1.1.5, 5.1.2, Glossary

From 5JSC/RDA/Full draft/LC response:
> 1.1.5 3rd para: recommend that the JSC work with the IFLA FRBR Review Group to revise the definition of "expression" to include movement notation.

After the March 2009 meeting the LC representative proposed the following definition:
> Expression - the intellectual or artistic realization of a work in the form of alpha-numeric, musical, or movement notation, sound, image, object, movement, etc., or any combination of such forms.

The revised definition will be proposed to the FRBR Review Group and if agreed changed in RDA after the first release.

Access points for manifestations and items

From 5JSC/RDA/Sections 2–4, 9/LC response:
> General comment about scope of RDA section 2: LC recommends extending the scope to manifestations and items: access points for (1) manifestations and items for subject relationships, and (2) manifestations in different carriers for the same expression.

At the April 2008 meeting (5JSC/M/238.5) the JSC agreed to defer consideration of this issue until after the first release of RDA.

Dates associated with an element

From 5JSC/RDA/Sections 2–4, 9/ALA response:
> 9.12. If this element is retained rather than indicating as relationship to a place (see General comment on "Entities as elements"), the element should include associated dates. ALA also suggests the repeatable sub-element Geographic level. This allows for clear structure of multiple levels of place for multiple residences.

From 5JSC/RDA/Sections 2–4, 9/LC response:
> 9.12-9.17: LC recommends adding an instruction about giving the time span if the information changes over time.

After the April 2008 meeting, the JSC discussed the inclusion of dates with the following elements:

9.11 Place of residence
9.12 Address of the person
9.13 Affiliation
9.14 Language of the person
9.15 Field of activity of the person
9.16 Profession or occupation
10.5 Place associated with the family

The JSC decided against including dates with these elements for the first release because this would result in divergence with FRAD and would mean than the elements were no longer "clean". The JSC agreed to consider the issue further after the first release and to also consider these issues:

(1) Addition of dates associated with Place ... and Address ... related to corporate bodies (comparable to actions for chapters 9 and 10).
(2) Revision of Change of name (now 11.2.2) for those situations when Place ... is part of the preferred access point (now 11.1.1.3) and that place changes; RDA lacks guidance for such a situation.

Legal works (various chapters)

Investigate if "international" in "international intergovernmental bodies," etc., is excluding categories/situations (i.e., intergovernmental bodies at national level or below). JSC reference: Proposed by the LC representative February 2009

Simplification of special rules in AACR2 chapters 22-26

At the April 2007 meeting the JSC agreed to consider after the first release simplification of special rules in AACR2 chapters 22-26 (5JSC/M/147.12.1, M/148.3).

Gap analysis with encoding standards

From 5JSC/ACOC Rep/2/BL response:
> BL welcomes this proposal from ACOC and hopes that similar gap analysis will be carried out in respect to formats other than MARC 21.

From 5JSC/ACOC Rep/2/CILIP response:
> CILIP welcomes the principle behind these specific proposals – that there may be data elements or sub-elements already provided for in other metadata universes which are worth considering for inclusion in RDA – but hopes that JSC will not restrict its consideration (or the underlying mapping that led to the current proposal) solely to MARC 21.

At the April 2007 meeting the JSC agreed to defer gap analysis with other standards until after the first release (5JSC/M/138.5.3)

Archival cataloguing and Museum practice

At the April 2007 meeting the JSC agreed to pursue reconciliation with principles used in archival cataloguing and museum practice (5JSC/M/151.4.1). Note: see "Type of family" and "Finding of objects" above.

Review Chair follow-ups to 5JSC/RDA/Full draft

Review the issues raised by other countries and rule-making bodies in their responses to 5JSC/RDA Full draft.

IEEE LOM

At the March 2009 meeting the JSC discussed a request for collaboration received from the IEEE LTSC/LOM Liaison Officer to ALA. The JSC and CoP agreed to investigate collaboration opportunities with IEEE LOM after implementation of the first release of RDA (5JSC/M/Restricted/276.15.1).

Complete examples

At the April 2007 meeting the JSC agreed to provide more full examples and to provide them in other display formats (5JSC/M/158.3).