

To: Joint Steering Committee for Development of RDA
From: Dave Reser, LC Representative
Subject: RDA Appendix K Revision and Expansion

Thanks to ALA for expanding the 'provisional' Appendix K to accommodate relationships that are bibliographically significant. This is a very challenging task. There are a few general issues that the proposed revision has raised for us, and we have comments on some specific comments on terms as well.

General Issues

1. Same designator in more than one list: We agree that the design solution adopted by ALA to repeat designators that are applicable to different types of entities in more than one section of the appendix will make it easier for catalogers to apply. We do not feel sufficiently confident in judging the impact of this decision on the registry, so would appreciate the advice of the CILIP Rep on this question. However, we note that some terms that are in more than one section of the list have different definitions and/or different reciprocals. We question whether a single term should have more than one definition or reciprocal. For example:

appointee

K.2.1.1 (Person to Person)

appointee A person designated by another person or the corporate body to fill an office or position. *Reciprocal relationship:* **appointer**

K.2.3 (Person to Corporate Body)

appointee A person designated by another person or the corporate body to fill an office or position **by the corporate body**. *Reciprocal relationship:* **appointee of**

teacher

K.2.1.1 (Person to Person)

teacher A person who instructs another person or is an instructor at an educational institution. *Reciprocal relationship:* **student**

K.2.1.3 (Person to Corporate Body)

teacher A person who instructs another person or is an instructor at an educational institution. *Reciprocal relationship:* **teacher at**

student

K.2.1.1 (Person to Person)

student A person who receives instruction from another person or at an educational institution. *Reciprocal relationship:* **teacher**

K.4.1 (Corporate Body to Person)

student A person who receives instruction from another person or at an educational institution. *Reciprocal relationship:* **student at**

representative

representative A person who represents the corporate body at a conference, meeting, event, etc. *Reciprocal relationship:* **representative of;**
representative to

(We note that two reciprocals are explicitly indicated here)

2. Designators that are too general: We feel that some of the relationship designators are too general, and have equivalence to a general relationship in RDA, or a combination of general relationships (a super relationship?). We question whether these relationships should be added to an appendix designed to further refine the general relationships. If the terms are added, we suggest that they must be moved to the highest level of the hierarchy for each list (as all other designators are subtypes). For example:

associated with: a combination of “related person” (30.1), “related family” (31.1), “related corporate body” (32.1); also note that due to the general nature of this relationship, all other terms should be subordinate to this term.

related to: a combination of “related person” (30.1), “related family” (31.1), “related corporate body” (32.1); also note that due to the general nature of this relationship, all other terms should be subordinate to this term.

relation: due to the general nature of the definition, all other familial relationships would be subordinate to this term.

3. Designators that are not significantly different: We believe that some designators should be collapsed, with the definitions adjusted to encompass the various subtypes. For example:

K.2.1.1 (and other lists): **beneficiary, patron of, sponsor of** (and inverses). We suggest these be combined into a single term, with **sponsor** as the term.

K.2.1.1 (and other lists): **associate, collaborated with, co-worker, partner**. We suggest these be combined into a single term, as the definitions are not significantly different.

K.2.1.1 (and other lists): **associated with, related to**. If these very general relationships are kept in Appendix K, we suggest they be combined, as the definitions are not significantly different.

K.2.3: **leader, administrator, director, governor, manager, religious leader, ruler**.

We suggest these designators be combined, as the definitions are so close as to be indistinguishable in many circumstances (in fact, the definition of **ruler** and **governor** are virtually identical). For the purposes of the appendix, these should be treated as synonyms, or catalogers will spend endless hours splitting hairs. We have a slight

preference for “leader” as the resulting term. We note that the CCC Rep has proposed other terms via the Fast Track process.

K.2.3: **representative, delegate.** We suggest these be combined into a single term.

4. Designations that are merely suggestive of a relationship, or indicate a former relationship: there are several relationship designators that we do not believe should be relationship designators, but included as part of another element or relationship.

distinguished from: use “explanation of relationship” (e.g., 30.2.1.3)

formerly related to: use “explanation of relationship” (e.g., 30.2.1.3) or entity-related attribute such as Affiliation (9.13) or Biographical information (9.17) *Note also:* ALA’s added text at K.0 about use of the present tense already indicates that “relationships that took place in the past” would use a standard present tense designator.

possibly identified with: use “explanation of relationship” (e.g., 30.2.1.3) or entity related attribute such as Biographical information (9.17)

possible relation: use “explanation of relationship” (e.g., 30.2.1.3) or entity related attribute such as Biographical information (9.17)

5. Designations that are too specialized

dissolver: We think that this is more likely to be a fact recorded in a “Corporate history” element (11.11) than as a specific relationship. We also note that many different entities could ‘dissolve’ a corporate body, e.g., a family, a board, a government, a higher body. We suggest this term be removed.

6. Designations that are indicative of another element, or belong in another appendix:

- At K.2.3, some designators are treated as a subcategory of employee (appointee, curator, teacher, professor) that more accurately represent the person’s “Profession or occupation” (9.16) and/or “Affiliation” (9.13). We strongly recommend against attempting to provide designators for occupations as a type of employee, as this pattern could get out of hand quickly (and for fear of offending a corporate body’s accountants, janitors, lawyers, etc.!).
- At K.4.3, the designators for capital, county seat, first-order administrative division (and inverses) belong in the ‘to be developed’ Appendix L, not in Appendix K.

7. Examples: As these are the first examples added to a relationship designator Appendix, we found them somewhat confusing (some thought they were presented as examples of the last term in the list). We think these examples would be better suited, and more in tune with RDA style, in the appropriate relationship chapters (e.g., Chapters 30-32). We also noted that the examples for “Alternative identity” for Anne Rice should say “Alternate identity”

Question on specific terms:

- **domestic partner:** we question whether the definition is as restrictive as the common usage of this term. As defined, it could cover any person living with another such as a parent, child, grandparent, roommate, pet, etc. We are more used to seeing “domestic partner” as a type of spouse that does not necessarily have a legal status, though some jurisdictions do consider it to be a legal status. We wonder if it would be better to incorporate the concept into **spouse**?
- **influenced, influenced by:** the current definitions are overly broad as persons typically may influence or be influenced by many entities daily. We also wonder if these terms are better as Appendix J relationship designators as it is the work of one creator that serves as an intellectual or artistic influence on the work of another creator?
- **publisher and publisher of:** while we understand the relationship, we think the more general **client/client of** may suffice. We are extremely reluctant to introduce a designator that may further confuse catalogers that already have trouble understanding the difference between the sub-element **Publisher name** (RDA 2.8.4) and the relationship **Publisher** (RDA 21.3). Furthermore, we feel that a relationship designator should not be the same as an element name.

8. Definitions

Many of the terms that are indented as a sub-type of another category do not include mention of the larger category. We question whether this is by design; in 6JSC/CILIP rep/3/Appendix 5, the CILIP Rep notes (in the context of “voice actor”) “The definitions of other subtypes use the term for the immediate type, so to improve consistency, the phrase ‘A performer’ should be replaced with ‘An actor’”. If this is a principle that would be generally applied, many definitions should be reformulated.