To: Committee of Principals for AACR
Joint Steering Committee for Revision of AACR

From: Deirdre Kiorgaard, Chair, JSC

Subject: 2006 Annual Report

Attached is the annual report of the Joint Steering Committee for 2006.

2006 ANNUAL REPORT

This document contains the report of the Joint Steering Committee for Revision of AACR (JSC) to the Committee of Principals for AACR (CoP) for the calendar year 2006. The Chair of JSC, Deirdre Kiorgaard, prepared the report.

Membership

The membership of the Committee was as follows:

American Library Association: Jennifer Bowen
(University of Rochester Libraries)

Australian Committee on Cataloguing: Deirdre Kiorgaard
(National Library of Australia)

British Library: Sally Strutt until 30 April 2006
Alan Danskin from 1 May 2006

Canadian Committee on Cataloguing: Margaret Stewart
(Library and Archives Canada)

CILIP: Chartered Institute of Library and Information Professionals: Hugh Taylor
(Cambridge University Library)

Library of Congress: Barbara Tillett

Chair: Deirdre Kiorgaard

Secretary: Nathalie Schulz

Meetings

Two meetings were held during the year. The first, hosted by the CCC representative, was held in Ottawa on 24-28 April 2006. The second was hosted by the Library of Congress representative in Washington, D.C. on 16-20 October 2006. During the April 2006 meeting, the JSC met jointly with the Committee of Principals (CoP).

As the development of RDA has progressed, the JSC has found that the twice yearly meetings are insufficient to complete our discussions of the extensive comments received on each RDA draft. In November 2006, a wiki site, hosted by the National Library of Australia, was set up to be used in the ongoing review of responses between meetings.

2006 in review

In 2006 the JSC made substantial progress towards the goal, set by the JSC and CoP in 2005, of creating *Resource Description and Access* (*RDA*) as a new standard designed for the digital world.

Drafts of significant portions of the text of RDA were released for constituency review. A complete draft of part I was issued in December 2005/January 2006; and first drafts of chapters 6-7 were issued in June 2006. Responses to these drafts were received from the six JSC constituencies, and from library rule-making organizations in six other countries.

Discussion of the major issues in the responses to the draft of part I commenced at the April 2006 meeting, and continued between the April and October meetings. At the October 2006 meeting, the JSC discussed the chapter 3 comments in detail, in preparation for reissuing a revised chapter 3 for review in early 2007. The JSC completed a high level review of the first draft of part A, chapters 6-7, and the draft was evaluated against the objectives and principles. More detail on the specific outcomes of each meeting is available in the April 2006 meeting Outcomes and the October 2006 meeting Outcomes.

The six constituencies that are represented on the JSC work as partners in developing RDA in a highly successful international collaborative effort. In the latter half of 2006, the American Library Association representative informed the JSC of concerns within that constituency regarding the development process for RDA. In summary, these related to the need for clarification of the decision-making responsibility; the pace of the RDA development timeline, and the need for additional support; the need for a review of RDA as a whole; and the need for a firm conceptual basis for RDA, which extended beyond AACR2. The JSC took steps immediately to address those concerns raised by ALA, some of which were shared by other constituencies, and to offer clarification where requested.

In December 2006, a Scope and Structure statement was released. This defined the scope and structure of RDA in relation to its underlying conceptual models and to two related metadata models. The Statement joins the RDA Strategic Plan and the RDA Objectives and Principles in defining the framework for the development of RDA, and will be a significant vehicle for communicating RDA's scope to other resource description communities.

The JSC is committed to an ongoing engagement with other resource description communities, including the ISBD community and library rule-making organizations in other countries. During 2006, our collaboration with the ONIX community resulted in the production of an agreed framework, the RDA/ONIX Framework for Resource Categorization. Consultations with the MARC 21 community have also commenced, with the production of a discussion paper and a mapping of RDA elements to *MARC 21* fields.

Project schedule

In response to shared constituency concerns about the pace of the RDA development process, and the need for a review of RDA as a whole, the RDA timeline was revised.

Work on RDA is now scheduled as follows:

- March-June 2007: Review of revised chapter 3

- July-September 2007: Review of revised chapters 6-7

- December 2007-March 2008: Review of part B

- July-September 2008: Review of complete draft of *RDA*

RDA is now scheduled for release in early 2009.

Project management

During 2006, the JSC's work on RDA benefited from the introduction of a project planning structure. A Project Management Committee (formed of the RDA Project Manager, JSC Chair, RDA Editor, CoP Chair, and a co-publishers representative) held regular teleconferences to monitor the project. Project plans were developed for different aspects of the work, and the JSC is working to Subplan B – Content development. A risk register for the project was also developed.

RDA Content development

- ***RDA Part A***

Chapters 1-5
Significant progress was made during 2006. It was agreed to revise the structure for *RDA* to more closely align it both with FRBR, and with concepts and terminology used for descriptive metadata outside the library community. Other changes will result in improved organisation of elements to reflect relationships between them, and a clearer delineation of required elements. Substantial progress was made in finalising decisions regarding chapter 3 Carrier, in preparation for reissuing a revised chapter for review in early 2007.

In addition to review of the draft RDA part I, the JSC also discussed during the year proposals from the constituencies on the following subjects:

Technical description of digital media (ALA) (will be included in revised chapter 3)
Video format characteristics (LC) (will be included in revised chapter 3)
Dimensions of binding (CILIP) (will be included in revised chapter 3)
Accessible formats used by visually impaired people (CILIP) (will be included in revised chapter 3)
Internationalization of part I (LC) (discussion will continue in 2007)

Persistent identifiers and URLs (ACOC) (discussion will continue in 2007)

Chapters 6-7

At the April 2006 meeting, the JSC discussed a preliminary draft of RDA part II (as it was then called). Also discussed was an LC proposal on family names. In June 2006, a draft of chapters 6-7 was issued for review, and the major issues arising from this were discussed at the October 2006 meeting. The Editor will be preparing revised draft chapters and those detailed comments in the constituency responses to the June 2006 draft of chapters 6 and 7 which are still relevant will be discussed in 2007, as will a proposal from CCC on other agreements involving jurisdictions.

- *RDA Part B*

In September 2006, the Editor prepared a draft of RDA part B for JSC review. Discussion of this draft will occur in 2007, as will discussion of a proposal from the Library of Congress on Bible uniform titles.

- *RDA Appendices and Glossary*

At the October 2006 meeting, the JSC approved a number of additions to the appendix on initial articles and discussed a status report from the Appendices Working Group (see below). Sally Strutt (former JSC Chair) prepared an analysis of Glossary terms, which will be used as the basis for future work.

JSC Working Groups

The JSC has delegated work on a number of areas of RDA content development to specially formed working groups. Members of these groups are listed below with their constituency affiliations.

RDA Examples Group 1
Chair: Denise Lim (CCC)
Members: Catherine Argus (ACOC); John Bowman (CILIP/BL); Kevin Randall (ALA); Pat Riva (CCC); David Sommerfield (LC); Jay Weitz (ALA)

RDA Examples Group 2
Chair: Adam Schiff (ALA)
Members: Catherine Argus (ACOC); John Bowman (CILIP/BL); Rachel Gagnon (CCC); David Sommerfield (LC); Jay Weitz (ALA); Kathy Winzer (ALA)

At the April 2006 meeting, the JSC discussed a report on examples in part I of RDA with Denise Lim, the Chair of the RDA Examples Group. At the meeting, it became clear that the work on examples was so time-consuming that a second examples group should be formed to cover chapters 6-7 and Part B of RDA. The Chair of the second Examples Group,

Adam Schiff, presented a very thorough report on the examples in chapters 6-7at the October 2006 meeting.

For documents, see the series: 5JSC/Chair/1

GMD/SMD Working Group
Chair: Patricia Thurston (ALA)
Members: Ann Chapman (CILIP/BL); Ebe Kartus (ACOC); Daniel Paradis (CCC); Helena Zinkham (LC)

The work of the GMD/SMD Working Group and responses to this from the constituencies were used by the Editor in drafting 5JSC/RDA/Part A/Categorization. For documents, see the series: 5JSC/Chair/6.

The work of this group was finalised in 2006.

Appendices Working Group
Chair: Judith Kuhagen (LC)
Members: John Attig (ALA); Kathy Glennan (ALA)

To assist with the work on RDA Appendices, the JSC formed a small group with members all within a close geographical proximity to each other. The Group prepared a status report that was discussed at the October 2006 meeting.

For documents, see the series: 5JSC/Chair/9

Outreach and Communication

As part of a desire to open up the RDA development process, the majority of current JSC working documents, including responses to drafts, are now available on the JSC public Web site http://www.collectionscanada.ca/jsc/working1.html. Web site statistics show peaks of activity when major documents are made available publicly on the JSC Web site.

The RDA discussion list, RDA-L, continues to be an effective channel of communication between those interested in RDA. Its membership has grown to 620 members from around the world.

Improvements are continually being made to the RDA pages on the Web site and the Frequently Asked Questions page is regularly updated.

During 2006, over 30 formal presentations on RDA were made in locations around the world. These presentations were given both by JSC members and by members of the constituencies. A list of presentations is maintained on the JSC Web site: http://www.collectionscanada.ca/jsc/rdapresentations.html

- *Links with specific communities*

Rule makers in other countries

Rule makers in France, Germany, Spain, Sweden, and Norway submitted formal responses to the drafts of part I and chapters 6-7. The ISSN International Centre responded to part I. Wherever possible, the JSC has replied to the issues raised in these responses.

The JSC submitted comments on the RICA Headings for Corporate Bodies (Italy).

RDA and MARC 21

The first step in a continuing process of working with the MARC community in the development of RDA began with the preparation, by ACOC and CCC, of a discussion paper and mapping of MARC 21 fields to RDA elements for discussion at the MARBI meeting in January 2007. The paper offered an "early alert" to MARC format developers of areas that the JSC considers would benefit from discussion with the MARC community (For the report submitted to MARBI see: 5JSC/Chair/12). Further work is planned in 2007, including an ACOC representative proposal for additions to RDA, and a mapping of RDA to MARC 21.

RDA and ONIX

At the October 2005 JSC meeting, discussions were held with representatives of the publishing industry in the UK. Arising from this, a joint initiative was formed to create a framework for resource categorization which would align those portions of RDA related to categorizing resources with comparable sections of the ONIX formats. This collaborative effort between the library community and members of the international book industry will potentially facilitate data transfer between the two communities for all types of media.

In London in March 2006 a workshop was held in London attended by Tom Delsey (RDA Editor), David Martin (consultant to EDItEUR), Godfrey Rust (Rightscom/Ontologyx, consultant to the British Library), and Gordon Dunsire, (member of the CILIP/BL Committee on AACR who acted as facilitator).

At the April 2006 meeting, the JSC reviewed an interim report on the framework. The workshop participants then used the feedback from that review to produce the RDA/ONIX Framework for Resource Categorization. The Editor used the Framework in drafting 5JSC/RDA/Part A/Categorization that was issued in August 2006.

At the October 2006 meeting, the JSC discussed the proposal and identified some new categories that will be proposed for inclusion in the RDA/ONIX framework.

Meeting with Dublin Core and IEEE-LOM Representatives

At the October 2006 meeting, the JSC met with representatives of the Dublin Core (Diane Hillmann) and IEEE-LOM (Robby Robson) communities. After these discussions, the JSC agreed that further talks could be beneficial to all concerned and there are plans for a further meeting in April/May 2007.

- *RDA Outreach Group*

In 2006, the membership of the group was as follows:

Chair: Matthew Beacom (ALA) to November 2006.
Christine Oliver (CCC) from December 2006-

Members: Everett Allgood (ALA); Robina Clayphan (CILIP/BL); Gordon Dunsire (CILIP); Ebe Kartus (ACOC); Christine Oliver (CCC)

During 2006, the reporting line for the Outreach Group was changed, and the Group now reports directly to the RDA Project Manager. The Outreach Group members were involved in presentations on RDA, and with maintaining links with stakeholders, in particular the Dublin Core community.

JSC Certificates

During 2006, the JSC issued certificates to express its appreciation to a number of individuals who have made a significant contribution to the RDA development process.

For reviewing RICA draft rules and providing the JSC with draft responses:
Randall Barry (Library of Congress)

For work with the RDA/ONIX Initiative and contribution to the promotion of RDA:
Gordon Dunsire (Centre for Digital Library Research, University of Strathclyde)

For contribution to the GMD/SMD Working Group:
Ann Chapman (UKOLN)
Ebe Kartus (Deakin University)
Daniel Paradis (Université de Montréal)
Patricia Thurston (Yale University)
Helena Zinkham (Library of Congress)

For work on the JSC Web site and RDA-L:
Bill Leonard (Library and Archives Canada)

Acknowledgements

I would like to thank the following:

- The members of the JSC working groups, the RDA Examples Groups 1 & 2 and the Appendices Working Group, for displaying the flexibility, tolerance, initiative and dedication needed to develop RDA in an environment of continual change and progress.

- Nathalie Schulz, as always, for her outstanding contribution as JSC Secretary.

- The members of the JSC for their conscientious and tireless efforts in developing RDA as a content standard for the future.

- The members of the Committee of Principals for their ongoing sponsorship of the RDA development process.

Deirdre Kiorgaard
Chair, Joint Steering Committee for Revision of AACR