NARDAC RDA Update Forum

August 30, 2021

Agenda

Kathy Glennan, University of Maryland - RDA Steering Committee (RSC) chair

Melanie Polutta, LC representative, Library of Congress

Clara Liao, LC representative, Library of Congress

James Hennelly, ALA Publishing – RSC ex officio member

Stephen Hearn, ALA representative, University of Minnesota – NARDAC chair

Robert Maxwell, ALA representative, Brigham Young University

Thomas Brenndorfer, CCC representative, Guelph Public Library - NARDAC representative to RSC

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Q&A

RSC in 2021: An Operational Reboot

Kathy Glennan

Chair, RDA Steering Committee

Director, Cataloging & Metadata Services University of Maryland Libraries



RSC Meeting Frequency

- Continuing with quarterly, rather than annual, meetings
 - Change proposals may be considered at any RSC meeting
 - First three meetings of the year held asynchronously
 - Week-long meetings; no observers can be accommodated
 - Final meeting (October) normally held in person
 - Except during a pandemic, when this is converted to a two-week virtual meeting
 - Using a combination of synchronous and asynchronous meeting styles
 - Complex proposals reserved for this meeting
 - Observers may be accommodated in public session(s) registration required
 - For the October RSC meeting, there will be one synchronous public session: Monday, October 18, 10:00 am-noon EDT, via Zoom
 - Registration details are forthcoming

RSC in 2021: An Operational Reboot

Considering Changes to RDA

- Formal processes may be submitted anytime
 - Proposal
 - Formal document submitted to RSC for consideration by an RSC member
 - May come from a regional group (e.g., NARDAC), an RSC Working Group, or an RSC member
 - Shared publicly in advance of the RSC meeting
 - Discussion paper
 - Similar to the proposal process, in terms of formality, point of origin, and sharing
 - Used for complex issues with more than one possible solution

Considering Changes to RDA

- Less formal processes
 - Fast track
 - Suggestions for improving consistency in wording, additions to vocabularies, and other changes without wider impact
 - Capable of inclusion in RDA without negative impact on its users
 - Submitted by an RSC member; discussed by RSC
 - Consultation with regional groups is optional
 - Not publicly posted for comment
 - Considered at any time
 - Editorial changes
 - Corrected by RSC Secretary when identified by RSC member or RDA user no other review required

Streamlining the Proposal process?

- Learning from the benefits and drawbacks of the previous JSC/RSC process
- Goals to
 - Devote less time and effort in creating responses, and also reducing the formality
 - Encourage collaboration among RSC members, including the possibility of a joint proposal
 - Establish an efficient process that allows the RSC to consider proposals at any RSC meeting, but with the benefits of getting community review
 - Allow enough time to make an informed decision, without delaying difficult decisions because they are too complex
 - Retain transparency in RSC decision-making

RSC Technical Working Group

- Standing group, chaired by RSC's Technical Team Liaison Officer (currently Damian Iseminger)
- Charged to:
 - Assist the RSC in developing RDA in technical areas such as models, structures, semantics, and standards
 - Assist ALA Publishing in developing and maintaining the RDA Registry
 - Assure technical conformance with the RDA ontology as requested by communities and users

Technical Working Group Responsibilities Include

- Review of all change proposals made to the RSC (formal and fast track)
 - Ensures that the proposed change conforms to the RDA/LRM ontology
 - Ensures that the proposed change does not introduce redundancy in the RDA ontology
 - Advises on generalizing the technical context of a proposed change: can the change be broadened to benefit other areas?
- Coordination and maintenance of mappings and alignments between RDA elements and
 - MARC 21UNIMARC
 - Dublin Core
 Relevant ILFA namespaces
 - BIBFRAME
 Wikidata

Managing User Feedback

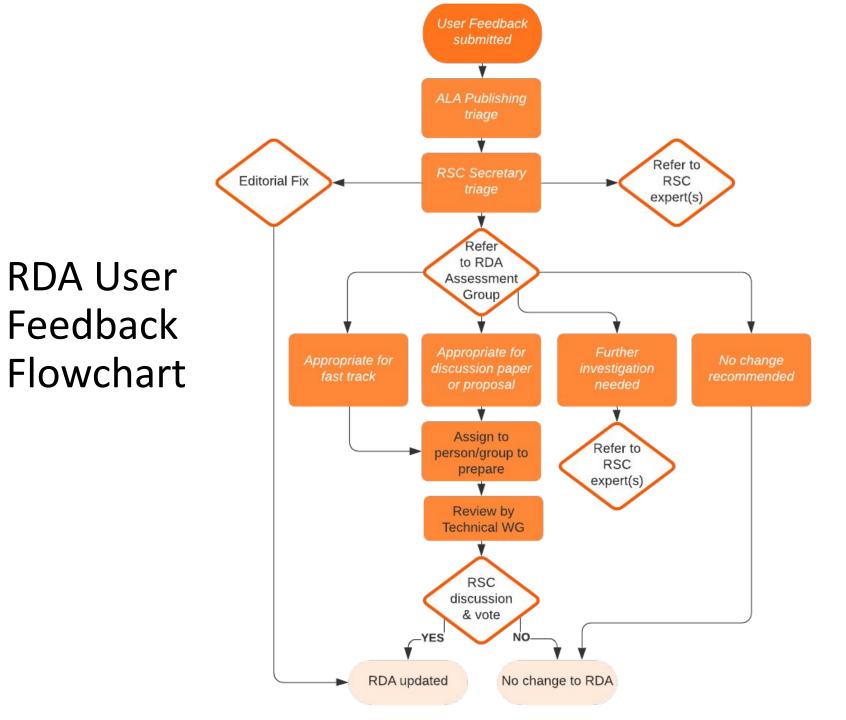
- Proposed changes may come from users via the <u>Submit Feedback</u> <u>link</u>
 - Triage by Director of ALA Digital Reference
 - For the issues referred to the RSC Secretary...
 - Editorial?
 - Refer to the RSC Technical Team Liaison Officer or other RSC member?
 - Fast track?
 - Refer to proposal or discussion paper process?
 - Requires finding an individual or group to do the work
 - But what about suggestions that fall somewhere in between this referral/resolution process?

RDA Assessment Group

- Formed as an outcome of the RSC April 2021 meeting
- Addresses issues beyond routine editorial decisions, which are often in the territory of broader questions and principles
- Membership
 - RSC Secretary, RSC regional representatives
- Responsibilities
 - Analyzes the issue and then...
 - Refers it for action to an appropriate person or group (to create a proposal, fast track, etc.), or
 - Determines that the change cannot be accommodated in base RDA

Recent Assessment Group Topics

- Person: place of residence
 - Has scope note that is broader than residence
- Guidance: Resource Description: Minimum description of a resource entity: Minimum description of a manifestation
 - Ambiguous formatting of bullet points
- Manifestation: statement of responsibility
 - 2nd option in Prerecording section refers to "expressions"
- 12 unresolved issues in Transcription guidelines
- Use of "RDA" vs. "RDA Toolkit" in Introduction to RDA:
 Objectives and Principles



Community Resources (CR)



- Community-based content that conforms to RDA
 - Integrated into RDA Toolkit
 - Too specific for inclusion in base RDA not (fully) international in scope
 - May contain instructions, guidance, and/or vocabularies
 - May have attached policy statements
 - Owned, created, and maintained by a language community
- Structure under active development
- English language content moved from base RDA
 - Sept. 2020: Abbreviations, capitalization, initial articles, etc.
 - April 2021: Legacy Anglo-American instructions for pseudo-elements (legal, musical, religious works, and official communications)
 - July 2021: Community refinements content, principally string encoding scheme instructions

CR has Content – Now What?

- Hand off "ownership" from RSC to other groups
 - For English: some Anglo-American community (or group of communities)
 - NARDAC + ORDAC + British Library, etc.? [not yet settled]
 - For Finnish:
 - Ready to translate the English text
 - But can now apply their own approaches
- Communities implementing CR need to
 - Figure out how this part of RDA Toolkit works for them in concert with base RDA, policy statements, application profiles, etc.
 - Commit to regular review and revision
 - Ensure the content remains compatible with RDA
 - Update the CMS, or provide content for someone else to add

Wider Community Engagement Officer (WCEO)

- Position description updated in 2021
 - Engage with and represent RDA users who are not accommodated easily in the existing governance structure
 - Serve as a resource & communication channel for their RDA change proposals
 - Support existing communities' use and development of the CR section in RDA Toolkit and advise new communities about its use [NEW!]
 - Promote use and understanding of RDA worldwide
 - Serve on appropriate committees (e.g., MARC/RDA Working Group, RDA Board marketing group)
- WCEO-elect appointed: Charlene Chou
 - Now a non-voting member of RSC
 - Official two-year term (as a voting member) will start January 2022

More Information – General

- RDA Steering Committee website: http://www.rda-rsc.org/
 - Including pages for Presentations (by year) and Documents (by year)
 - 2021 Presentations: http://www.rda-rsc.org/node/654
 - 2021 Documents: http://www.rda-rsc.org/node/653
 - News and Announcements: http://www.rda-rsc.org/news
- Current RDA: https://access.rdatoolkit.org/
- RDA Toolkit website: https://www.rdatoolkit.org
- RDA YouTube channel [free!]:
 https://www.youtube.com/c/RDAToolkitVideo

More Information – Specific

- RSC proposal processes
 - RSC/Operations/4 -- Policy and Procedures for Updating RDA Content
 - RSC/Operations/5 -- Guidelines for Proposals, Discussion Papers, and Responses to Them
- Proposals scheduled for RSC discussion:
 - New RSC Documents 2021: http://rda-rsc.org/node/653
- Community resources:
 - In the RDA FAQ: http://rda-rsc.org/content/rda faq#24
 - Presentation: <u>RDA and Community Resources</u> (Thomas Brenndorfer, May 2021)
- Wider Community Engagement Officer
 - Job description included in <u>Application form</u>



Questions?
Ask at the end, or email me:

RSCChair@rdatoolkit.org

RDA/PS project (July 2021) & Metadata Guidance Documentation Update

Melanie Polutta & Clara Liao
LC representatives to NARDAC

What is the project?

Changing our documentation to work with the RDA Toolkit

Background information

- Documentation to be created:
 - Policy statements
 - Application profile
 - Metadata Guidance documentation

 Date of implementation of RDA Toolkit for LC/PCC no earlier than July 2022

Parts of the project

- 6 phases, overlapping in time
 - Phase 1: Analyze policy statements
 - Phase 2: DITA markup conversion of PSs
 - Phase 3: Application profile
 - Phase 4: Testing of policy statements (not started yet)
 - Phase 5: Metadata guidance documents
 - Phase 6: Training (not started yet)

Implementation!

Phase 1

- Analyze policy statements: Phase 1a
 - Cataloger analyzes current policy statements and writes new ones
 - Proofreader reviews what first cataloger wrote
 - Original writer finalizes their policy statements
- Analyze policy statements: Phase 1b
 - Cataloger analyzes the full RDA text to write new policy statements
 - Cataloger brings 1a text into cohesion with 1b text
 - Final review

Link to recording at 35:45 about process of PS analysis: http://login.icohere.com/PCC?pnum=PGZ70039

Policy Statements Team

- Project manager: Judith Cannan, Chief of PTCP
- Assignment manager: Clara Liao, Section Head of PTCP/CTPS
- Project lead: Melanie Polutta (PTCP/CTPS)
- Project management resource: Ivey Glendon (PTCP/CPPS)
- PTCP members: Paul Frank, Manon Théroux, Veronica Ranieri, Les Hawkins (retired), Ivey Glendon, Dorie Kurtz
- SCD/MD: Damian Iseminger
- ABA: Jacque Brellenthin, Sarah Byun, Steven Folsom, Bill Robboy, Trina Soderquist, Jessica Zieman, Elsie Ramirez
- Outside ABA: special format catalogers brought in for consultation

Editorial decisions

- Reality of an integrating resource
- Order of information
- Links to further information
- Context of Coreness
 - Policy statements for options should be evaluated within the coreness of the element
- Preferring an "Situation, decision" structure for writing policy statements

Editorial decisions

- Preferring IF/THEN in place of lists
- Do not record. Evaluate later.
 - Why? Because we don't have decisions yet.
- American spelling
- And/or
- "In most cases" over "generally"
- Vocabulary decisions

Link March 2021 NARDAC Update Forum at 26:50:

https://www.youtube.com/watch?v=2ORF3y8kkhg

Handling RDA PS Feedback/Comments

- Form for errors in policy statements, such as typos, grammatical issues, etc.
 - LC will not provide regular feedback on those reports.
 - Linked from PCC home page: https://loc.libwizard.com/f/lc-pcc-ps-error-report
- A LC/PCC group is in process for more content-based feedback

Phase 2 & 3

• DITA team:

- Ivey Glendon, Damian Iseminger, Clara Liao, Melanie Polutta, Manon Théroux, Dorie Kurtz
- Learned DITA and uploaded, both via batch and manually, the PSs in the DITA files

Application profile

- A format for AP spreadsheet has been established
- Working out a methodology for how to handle it

Phase 5: Metadata Guidance Documentation

- The initial plan draft was completed in late May. Top level analysis was done to map from the existing LC-PCC PSs in the original RDA Toolkit to the Official RDA Toolkit.
- LC MGD work was launched on June 9th. PCC MGD work was launched on June 28th (Initial session with British Library MGD working group was held on July 8th.) MGD writing work is expected to be completed on Oct. 22nd.

MGD: LC Team

- Project manager: Judith Cannan, Chief of PTCP
- Project leader: Paul Frank (PTCP/CPPS), Clara Liao (PTCP/CTPS)
- Project publication tech. support: Ivey Glendon
- PTCP members:, Dorie Kurtz, Melanie Polutta, Veronica Ranieri, Manon Théroux
- SCD/MD: Damian Iseminger
- ABA: Jacque Brellenthin, Sarah Byun, Steven Folsom, Trina Soderquist, Elsie Ramirez, Jessica Zieman

MGD: PCC Team

- Adam Baron (University of North Texas)
- Annick Cloatre, Caroline Kent, Manta Fernandez, Dave Roberts, Phil Bishop (British Library)
- Bob Maxwell (BYU)
- Lori Robare (University of Oregon)
- Adam Schiff (University of Washington)
- Dave Van Kleeck (University of Florida)

Metadata Guidance Documentation

- Two document formats for MGD creation:
 - 1:1 MGD: Many of the existing LC-PCC PSs map to one specific LC-PCC PS in the Official RDA Toolkit.
 - Narrative MGD: Other existing LC-PCC PSs map to multiple LC-PCC PSs in the Official RDA Toolkit. Because of this one-to-many mapping, these MGDs, named "Narrative MGDs" are more general in nature and describe higher-level decisions that need to be made and applied in cataloging.

"Alone we can do so little; together we can do so much."

Thank you for your attention



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Server Migration

- Delayed until week of October 25th
- •Impacts RDA Toolkit, Original Toolkit, AACR2 and related Drupal Sites
- •Should not impact Toolkit users, but will include a new admin site
- •Editing of existing workflows and creation of new ones in the Original Toolkit will end September 1st (perhaps)

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Release Schedule

- October release will be rescheduled for December
- Change will impact the 2022 Release plans
- Committed to 4 releases in 2022

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Upcoming Webinars

- •Translating RDA: a Discussion of the Opportunities and Challenges of an International Cataloging Standard September 20th
- •AP Development webinar in October
- Guidance concepts and boundaries webinar in November
- •Policy Statements webinar in December?

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Contact Us

- rdatoolkit @ala.org
- jhennelly@ala.org

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RDA and Others – Beyond Mapping

Stephen Hearn, University of Minnesota NARDAC chair

Uniform and Hybrid Descriptions

- MARC21 has a long history as a uniform basis for metadata communication and exchange
- Linked data favors combining elements from different sources, e.g., RDF Schema, RDA, Dublin Core, ...
- RDA uses constrained elements—implications for mapping?
- RDA defines unconstrained elements for mapping RDA metadata out to other schemas—no round trip

The Problem with the Mapping Metaphor

- Schemas create mapping tables to relate elements to other schemas
- Mapping metaphor supposes a consensus geography
- Conceptual models differ—no assured consensus view
- If entity modeling differs between schemas, how can their statements be associated?
- Is mapping at the statement level really what's needed?

Entity relationships

- Identifiers for description sets have more semantic value than individual statements
- We already relate descriptions of resources to descriptions of persons, corporate bodies, etc.
- Rather than transforming description sets from one schema to another, statement by statement, we need ways to relate entity descriptions across schema differences

Modular metadata

- Already practice this with bib records linked to
 - holdings and item descriptions
 - name authorities
 - subject authorities
- PCC is exploring links to descriptions in Wikidata, ISNI, and other identity registries
- Both RDA and BIBFRAME break the bib resource into modular metadata, but following different models
 - Work/Expression/Manifestation/Item
 - Work/Instance/Item

What is needed?

- Division of metadata into ontology-based modules
- Flexibility for expressing primary relationships between entities described with different schemas
- Identifiers rather than authorized access points
- Systems adept at selecting and presenting metadata from different schemas in a combined display, plus links for exploration

RDA openings to other schemas

- RDA includes relationships to non-RDA entity descriptions
- Work: related entity of work—refine the RDA element to express relations with non-RDA entities, e.g., animals and fictitious entities? Publishing RSC ex officio member
- Work: manifestation of work and Expression: manifestation of expression—will a BIBFRAME Instance description satisfy the RDA range constraint to manifestation for these elements?

Curator in RDA A case study of change in the "new" RDA



NARDAC Forum 30 August 2021

Robert L. Maxwell
ALA co-representative to NARDAC

ARLIS/NA proposal, March 2019

 Proposal to ALA's Committee on Cataloging: Description and Access 3R Task force

The problem

 In current RDA "curator" relationship designator is reserved for "item"

1.5.2 Relationship Designators for Other Agent Associated with Item

Record an appropriate term from the following list with the authorized access point or identifier for an other agent associated with item (see 22.4 RDA). Apply the general guidelines on using relationship designators at I.1 RDA.

annotator: A person who makes manuscript annotations on an item.

Reciprocal relationship: annotator of.

autographer: A person whose manuscript signature appears on an item.

Reciprocal relationship: autographer of.

binder: A person who binds an item. Reciprocal relationship: binder of.

curator: An agent conceiving, aggregating, or organizing an exhibition, collection, or other item.

Reciprocal relationship: curator of.

collection registrar A curator who lists or inventories the items in an aggregate work such as a collection of items or

Reciprocal relationship: collection registrar of

collector. A curator who brings together items from various sources that are then arranged, described, and cataloged as a collection.

Reciprocal relationship: collector of.

The problem

• Curators in art libraries and museums do not necessarily do their work at the item level. For example, they may "conceive, select, and organize presentations" such as exhibitions. What is the relationship of this person to, for example, a catalog of the exhibit?

The ARLIS/NA proposal

- Change domain from "item" to "work" for all "curator" relationship elements in Beta RDA
- Change range from "item" to "work" for all "curator of" relationship elements in Beta RDA
- Redefine "curator agent" as "An agent who curates an exhibition that gives rise to a work."
- Redefine "curator agent of" as ""A work that involves a responsibility of an agent for curating an exhibition that gives rise to a work."

The process

- The proposal was discussed at the next NARDAC meeting, March 18.
- It was also discussed in the CC:DA 3R Task Force.
- NARDAC pointed out that there was a moratorium on change proposals at the time, so put on hold

The process

- Curator proposal became a "test case", the first revision proposal to the "new" RDA from CC:DA
- Became a formal proposal at Annual 2020, sent to NARDAC.

The CC:DA proposal

- Discussed the complexity of responsibilities of agents with title "curator"
- Proposed various solutions, including "shortcuts"
- Justified adding elements "curator agent of work" and "curator agent of work of" to RDA
 - Suggested new labels, definitions and instructions for the new elements
- Recognized the need for the existing item-level relationship element
 - Recommended modifying element labels to indicate the relationship (e.g. curator agent □ curator agent of item)
- Noted the possibility of permitting communities to create refinement vocabularies

The NARDAC proposal

• NARDAC revised the CC:DA proposal somewhat, and sent it to the RDA Steering Committee for discussion in October 2020.

The RSC response

- The NARDAC proposal was treated as a test case for the process
- Proposals for substantial changes should come to RSC as a discussion paper first, including multiple options for RSC to vote on
- Such proposals should be vetted by the Technical Working Group first

Technical WG white paper

- On August 2 the RSC Technical Working Group published a paper titled *Implementing the Collections Model in RDA*
- RSC/TechnicalWG/2021/2
- Available at http://rda-rsc.org/node/653

- A "collection" is a plan to gather two or more items that form a manifestation
- Items are gathered together after their creation to form a *collection manifestation*
- This is to be contrasted with an "aggregate" that is a gathering of two or more expressions that are embodied within a manifestation
- "Collections" can be as coarse as the entirety of the holdings of a research library or as granular as the papers produced by a specific person
- An exhibit would be an example of a collection in this sense

• A collection work is a plan for selecting items that are to be gathered together for some purpose. It realizes one and only one collection expression which in turn realizes one and only one collection manifestation. The collection item is the one and only exemplar of the collection manifestation. A collection item is the set of all items that are gathered by the collection work.

• Recommendation 1: Add concepts for collection work, collection expression, collection manifestation, and collection item to the RDA Terms vocabulary encoding scheme.

- Because the *collection work* is the plan for how items are selected that form the *collection item*, two new attribute elements are needed to describe the accrual method and the accrual policy for the items that are to be gathered together.
- Recommendation 2: Add an attribute element with a domain of Work to describe the accrual methods associated with a collection work with the label "collection accrual method."
- Recommendation 3: Add an attribute element with a domain of Work to describe the accrual policies associated with a collection work with the label "collection accrual policy."

Recommendation 1: Add concepts for collection work, collection expression, collection manifestation, and collection item to the RDA Terms vocabulary encoding scheme.

Label	collection work
Definition	A work that is a plan for selecting items that are to be gathered and kept together for some purpose.

Label	collection expression
Definition	An expression that is the realization of a collection work.

Label	collection manifestation
Definition	A manifestation that is the embodiment of a collection work and expression.

Label	collection item
Definition	An item that is the exemplar of a collection manifestation.
Scope note	A collection item is the set of all items that are gathered by a collection work.

Recommendation 2: Add an attribute element with a domain of Work to describe the accrual methods associated with a collection work with the label "collection accrual method."

Toolkit label	collection accrual method
Toolkit definition	A method of transfer of ownership of the items that are added to a manifestation of a collection work.
Domain	Work
Toolkit text	Standard text for attribute elements that have an available RDA vocabulary encoding scheme with incomplete coverage. See template.

Recommendation 3: Add an attribute element with a domain of Work to describe the accrual policies associated with a collection work with the label "collection accrual policy."

Toolkit label	collection accrual policy
Toolkit definition	A policy for selecting items that are added to a manifestation of a collection work.
Domain	Work
Toolkit text	Standard text for attribute elements that have an available RDA vocabulary encoding scheme with incomplete coverage. See template.

- Part 2 of the paper discusses subject hierarchy revisions to accommodate the model
- "This set of proposals provides several recommendations for revising the already existing infrastructure in RDA for relating an RDA entity to works that describe that entity."
- For example, an exhibit catalog

Recommendations of the WG for curator

- Part 4 of the paper is titled "Agents related to collections and their descriptions."
- Collection works and collection descriptions are created by agents
- "It is ... clear that collectors/curators are responsible for the collection work, the plan for gathering items held by a collection manifestation."

Recommendations of the WG for curator

Recommendation 1: Deprecate "collector agent," its element subtypes, and their inverses.

Recommendation 2: Deprecate "curator agent," its element subtypes, and their inverses.

Recommendation 3: Add new elements with the label of "collector agent" and its agent subtypes with a domain of Work and a range of Agent and its entity subtypes as an element subtype of "creator agent of work" and its agent subtypes to relate a collection work to an agent responsible for it.

Recommendation 4: Add new elements with the label of "collector agent of" and its agent subtypes with a domain of Agent and its entity subtypes and a range of Work as an element subtype of "creator agent of work of" and its agent subtypes to relate an agent responsible for a collection work to a collection work.

Recommendations of the WG related to the curator proposal

Recommendation 3: Add new elements with the label of "collector agent" and its agent subtypes with a domain of Work and a range of Agent and its entity subtypes as an element subtype of "creator agent of work" and its agent subtypes to relate a collection work to an agent responsible for it.

Toolkit label	collector agent
Toolkit definition	An agent who is responsible for creating a collection work by selecting and arranging items that exemplify the embodiment of other works.
Domain	Work
Range	Agent
subtype of	creator agent of work
Toolkit text	Standard text for relationship elements. See template.

Resolution of the NARDAC issues

- An exhibition is a *collection manifestation*. It embodies the work/expression that is the selection criteria, extension plan, etc. of the exhibition/collection work.
- An exhibition catalogue is a *metadata work*: a *metadata description set* for the items that are selected for the exhibition; an analytic collection finding aid.

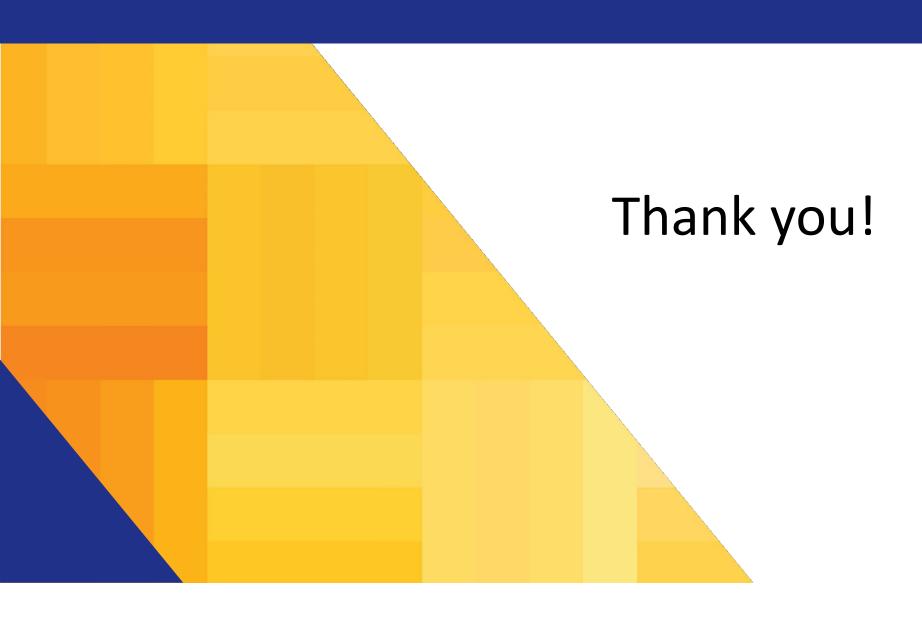
Resolution of NARDAC issues

```
(exhibition/collection) <Manifestation>
(has) work manifested (exhibition/collection) <Work>
(has) holding (exhibition) <Item>
(has) catalogue (exhibition catalogue/metadata) <Work>
(has) location of collection (exhibition venue) <Place>

(exhibition/collection) <Work>
(has) manifestation of work (exhibition/collection) <Manifestation>
(has) collector agent (exhibition collector) <Agent>
```

Resolution of NARDAC issues

```
(exhibition catalogue/metadata/aggregating) <Work>
(has) expression of work (exhibition catalogue/metadata/aggregating) <Expression>
(is) catalogue of (exhibition/collection) <Manifestation>
[(is) hierarchic finding aid for exhibition/collection) <Manifestation>]
(has) collection registrar agent (exhibition cataloguer/aggregator) <Agent>
```



RDA Steering Committee – Recent RDA developments

Thomas Brenndorfer

August 30, 2021



Thomas Brenndorfer Guelph Public Library, Ontario, Canada

- RDA Steering Committee
- North American RDA Committee
- Canadian Committee on Cataloguing
- Author: RDA Essentials

tbrenndorfer@rdatoolkit.org

A quick primer on key RDA concepts in the new Toolkit ...

Definition and scope:

A distinct intellectual or artistic creation, that is, the intellectual or artistic content.

The term work may refer to:

- · an individual work
- a part of a work
- an aggregating work
- an augmented work
- · an augmenting work
- a diachronic work
- an integrating work
- · a metadata work
- · a serial work
- a single work
- a static work
- a successive work

A work that is categorized by its intended content or context may be referred to as:

- a cartographic work
- · a choreographic work
- · a legal work
- · a moving image work
- a musical work
- an object work
- · an official communication
- · a photographic work
- · a religious work
- a still image work
- a textual work
- a vocal work

The term work may refer to:

- · an individual work
- · a part of a work
- · an aggregating work
- an augmented work
- · an augmenting work
- a diachronic work
- · an integrating work
- · a metadata work
- · a serial work
- · a single work
- · a static work
- a successive work

The work as a "plan"

The term work may refer to:

- · an individual work
- · a part of a work
- · an aggregating work
- · an augmented work
- · an augmenting work
- a diachronic work
- an integrating work
- · a metadata work
- · a serial work
- a single work
- a static work
- a successive work

The work as a "metadata statement" or a "metadata description set"

July 2021 RSC meeting

RSC/TechnicalWG/2021/1

Proposal for Realignment of Expression to Expression Relationship Elements

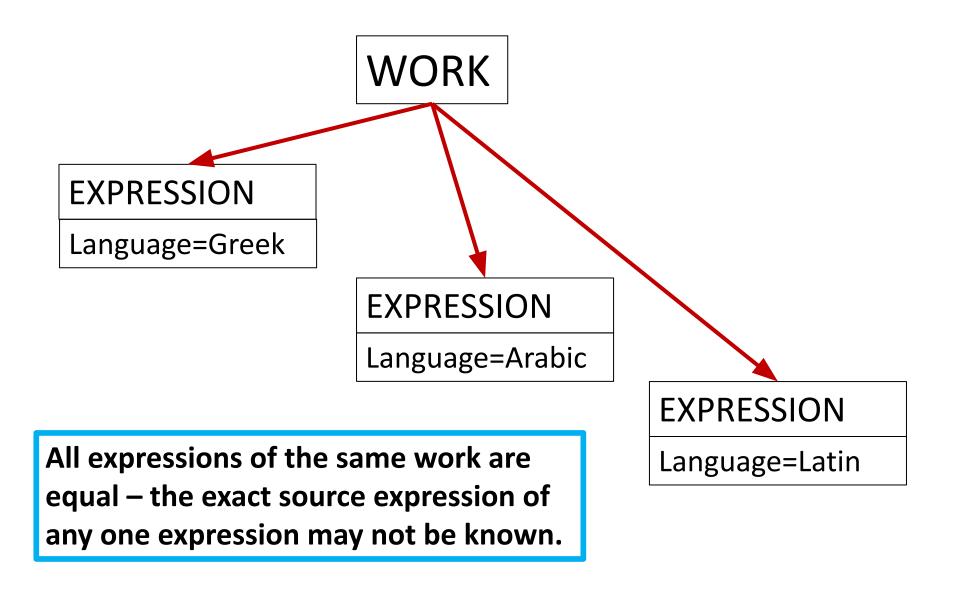
Comparing

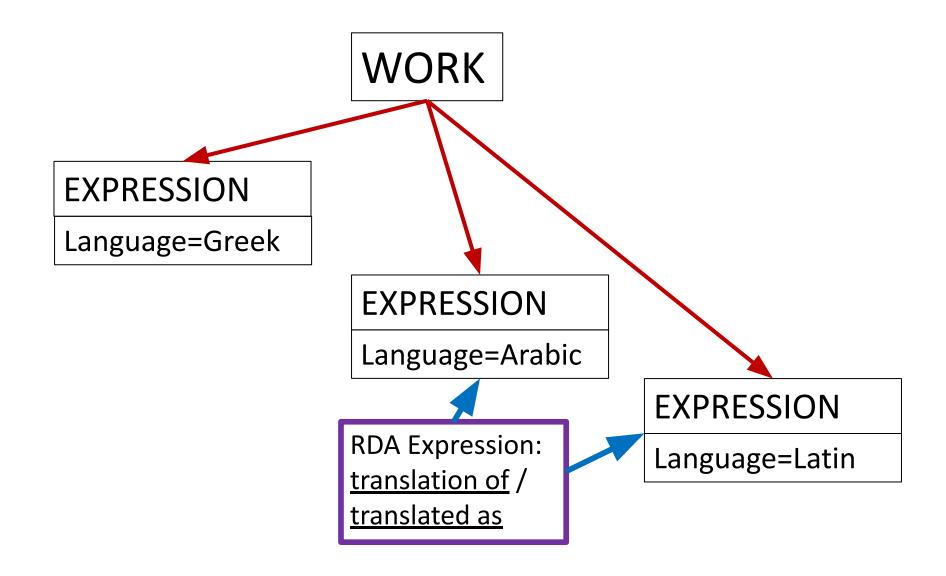
RDA – Expression: <u>based on expression</u>

and

• LRM R24 – "is derivation expression of" – a relationship between two expressions of the same work

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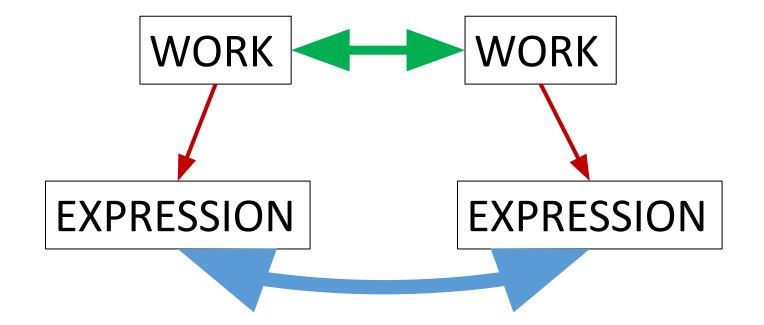


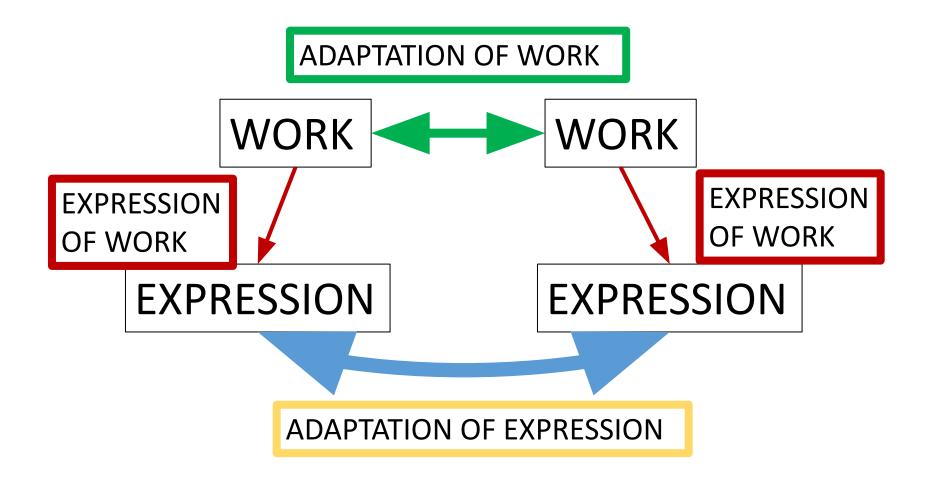
But... RDA had some elements for expressions that were derived from expressions of <u>different but related</u> works

Examples:

- Abridgement of expression
- Adaptation of expression
- Expanded version of expression
- Free translation of expression
- Imitation of expression
- Paraphrase of expression
- Remake of expression
- Variations based on expression

Shortcuts to the rescue...





Expression: adaptation of expression

Prerecording

This element is a shortcut for the following chain of relationships:

- 1. Expression: work expressed for a work that is an adaptation that is realized by the expression
- 2. Work: adaptation of work for a work that is used as the source of the adaptation work
- 3. Work: expression of work for an expression that is the realization of the source of the adaptation work

The element does not identify any adaptation work that is realized by the expression or any work that is the source of the adaptation work.

Expression: adaptation of expression

Prerecording

This element is a shortcut for the following chain of relationships:

- Expression: work expressed for a work that is an adaptation that is realized by the expression.
- 2. Work: adaptation of work for a work that is used as the source of the adaptation work
- 3. Work: expression of work for an expression that is the realization of the source of the adaptation work

The element does not identify any adaptation work that is realized by the expression or any work that is the source of the adaptation work.

Shortcut around describing

or naming related works

Expression	Element	Work	Element	Work	Element	Expression
(Domain)						(Range)
Expression being	Expression: work	Derivative work	Work: adaptation	Work that is	Work:	Expression that
described	expressed	that is realized by	of work	used as the	expression of	realizes the
		the expression		source of the	work	source of the
		being described		derivative work		derivative work

ADAPTATION OF EXPRESSION

Final result – renaming top elements for new definitions with shortcuts

Expressions derived from expressions of <u>different but related</u> works:

Expression: expression of source work

An expression of a work that is modified to create an expression of a derivative work

Reciprocal:

Expression: expression of derivative work

An expression of a work that is a modification of a source expression of a different work

Final result – new elements for LRM alignment

Expressions derived from an expression of the <u>same</u> work:

Expression: source expression

An expression that is modified to create a new expression of the same work.

Reciprocal:

Expression: derivative expression

An expression that is a modification of another expression of the same work.

arrangement of; revision of; translation of

Final result – labels for consistency elsewhere

Work: source work

[Alt label – "based on work"]

A work that is modified to create a new work.

Reciprocal:

Work: derivative work

A work that is a modification of another work.

Leftovers...

Expression: abstract of expression

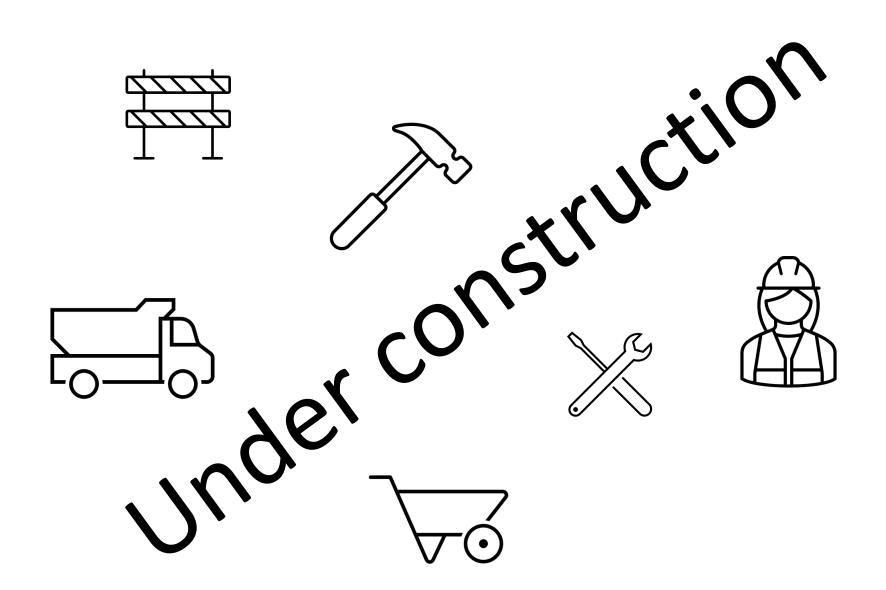
Expression: abstracts for expression

Expression: indexing for expression

Expression: summary of expression

... for further evaluation in a future proposal for collection-level description in RDA

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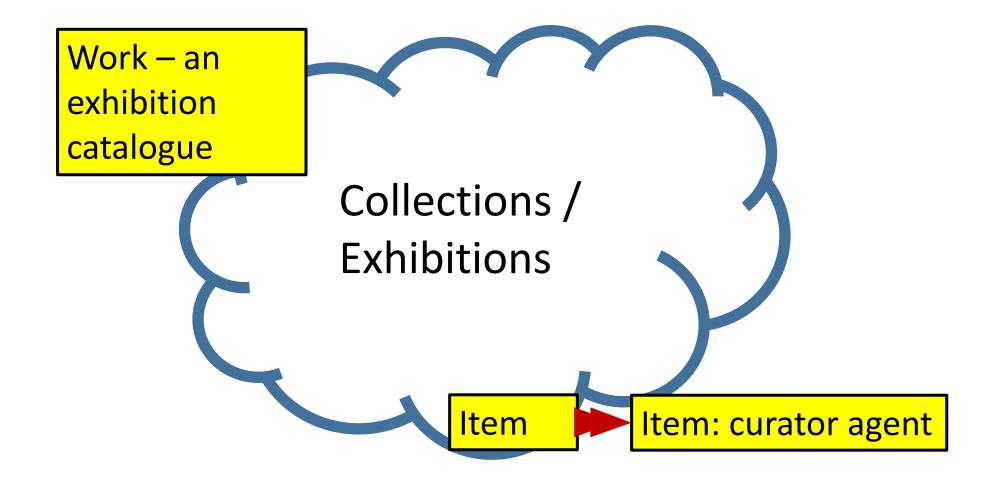


What does a catalog describe?

Work – an exhibition catalogue

Collections / Exhibitions

The role of a curator of a collection



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The collections model proposal

The collection work is a plan for selecting items to be gathered together for some purpose

(Collection) work(Collection) expression(Collection) manifestation(Collection) item

Subcollections

(Collection) manifestation

subcollection

(Collection) manifestation

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Holdings

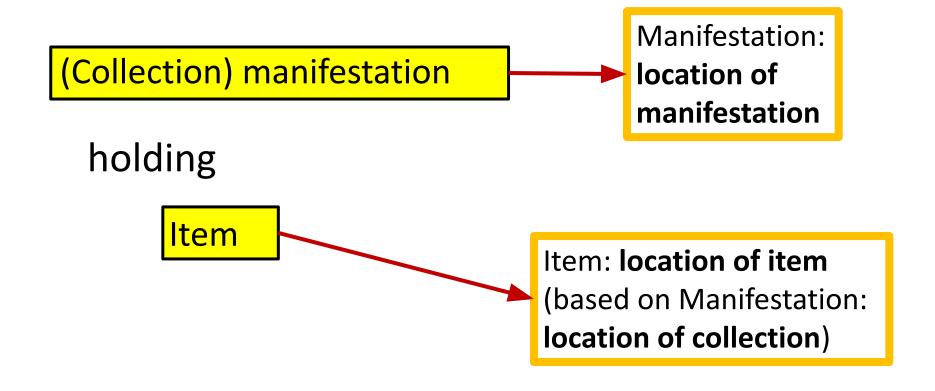
(Collection) manifestation

subcollection
holding
(Collection) manifestation

Item
holding

Item
Item
Item

Locations of collections and items



Collection manifestations can cover many cases for connected items

(Collection) manifestation

holding

Item

Item: bound with

Item: on manifestation with (items reproduced as components of manifestations – covers "Item: filmed with item", "on disc with item")

Item: held with (replaces Item: accompanied by item – now held together in a collection manifestation)

How to describe a collection?

(Collection) manifestation

Manifestation: **subject manifestation of** [Work]

- Manifestation: manifestation described by metadata by [(metadata) Work]
 - Manifestation: finding aid [(metadata) Work]
 - Manifestation: catalogue [(metadata) Work]
 - ☐ Manifestation: hierarchic finding aid [(metadata) Work]

So there are two works here...

The catalogue of the collection

- Work: metadata description of [collection manifestation]
 - Work: catalogue of [collection manifestation]

The collection work

Work: manifestation of work [collection manifestation]

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Agents responsible for the works

Work = Collection work

Work: collector agent

An agent who is responsible for creating a collection work by selecting and arranging items that exemplify the embodiment of other works.

Replaces current *collector agent* and *curator agent*, which were item relationship elements.

Agents responsible for the works

Work = Metadata description set

Work: compiler agent

An agent who is responsible for creating a metadata description set.

A metadata description set includes a bibliography of works, expressions, or manifestations, a directory of agents and places, and an analytic finding aid.

☐ Work: collection registrar agent

An agent who is responsible for creating an analytic finding aid.

Alternate label: cataloguer agent

Thank you!

RDA Steering Committee – http://www.rda-rsc.org/

RDA Steering Committee FAQ – http://rda-rsc.org/content/rda_faq

RDA YouTube channel – https://www.youtube.com/c/RDAToolkitVideo

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Questions?