To: RDA Steering Committee

From: Gordon Dunsire, Chair, RSC

Subject: Preparation of RDA for the 3R Project

This document describes the background to changes made to the labels, definitions, and associated instructions of many RDA Elements in the February 2017 release of RDA Toolkit.

The changes made to RDA Toolkit are not intended to affect the current interpretation and the outcome of applying the instructions will not be different.

This document is primarily intended for users of RDA Toolkit who are interested in the context of the changes and the future development of RDA.

Background

3R Project

The RDA Toolkit Restructure and Redesign (3R) Project was announced in October 2016, after a year of initial planning.[1]

The project involves restructuring the content management system for the RDA instructions to bring it up to date with data management best practices. This will make the data underpinning RDA Toolkit more modular, allowing greater flexibility in presentation and efficiency in maintenance and translation, and will complement the development of the infrastructure for RDA Reference and the Toolkit Glossary carried out during 2016.[2]

The RDA Steering Committee (RSC) agreed at its meeting in November 2016 to proceed with initial implementation of the IFLA Library Reference Model (LRM) as part of the 3R Project.[3]

---

[1] RDA Toolkit Restructure and Redesign Project. Available at: http://www.rdatoolkit.org/blog/3RProject

[2] RSC/Chair/17: RDA Toolkit Glossary and RDA Reference. Available at: http://www.rda-rsc.org/sites/all/files/RSC-Chair-17-fix.pdf

[3] RSC/Outcomes/2016: Outcomes of the 2016 RSC Meeting. Available at: http://www.rda-rsc.org/sites/all/files/RSC-Outcomes-2016.pdf

LRM

The LRM adds at least five new entities to RDA: *Agent*, *Collective Agent*, *Nomen*, *Place*, and *Time-span*. *Agent* has been implicit in RDA, as "a person, family, or corporate body", while *Place* has explicit instructions but remains under-developed. Both entities are represented in the RDA Registry for consistency with RDA Reference.

Collective Agent, *Nomen*, and *Time-span* were added to the RDA Registry in release 2.6.0 in December 2016. They will be developed in the 3R Project and will not be included in RDA Toolkit until 2018. A set of high-level relationships between all of the entities was included, to provide a cross-entity "matrix" to accommodate the current RDA relationship elements and designators and their future development.[4]

The LRM allows an attribute to be a relationship, and vice-versa; this is consistent with linked data principles and supports the "4 fold path" for capturing and recording data in a wide variety of scenarios including unstructured descriptions, structured descriptions, identifiers, and URIs.

The RSC anticipates a significant increase in the number and range of RDA elements as a result. It is important that patterns for labels and definitions are established beforehand, to ensure consistency and clarity.

Translations

The infrastructure for maintaining RDA content in English will be extended to translations of RDA during the project. The English content will be frozen between the April 2017 and April 2018 releases of RDA Toolkit, but updates to translations are expected for the August 2017 release to synchronize the content and structure. Translations will then have to be re-synchronized with the new content of the April 2018 Toolkit, using the improved facilities delivered by the project.

Translations will therefore benefit if standardized wording consistent with the LRM is introduced as soon as possible.

---

[4] Representing the RDA ontology: Relationship matrix. Available at:
http://www.rdaregistry.info/rgAbout/rdaont/ontRelMatrix.html

Organization of RDA instructions

The RDA instructions are currently organized by the entity to which they apply. Some elements are organized within two entities, for example Work and Expression. The RSC wishes to make this more consistent, and to reflect the LRM where each entity is treated separately.

This involves clarification of the element and entity to which an instruction applies. Instructions that cover more than one element or entity require disentanglement and separation into general and local parts.

Changes in the February 2017 release of RDA Toolkit

The term "resource" is replaced in the RDA element definitions, labels and Toolkit instructions with the preferred label of the specific entity, that is "work", "expression", "manifestation", or "item", where it does not involve major re-drafting of the instructions. This clarifies the entity to which an element and set of instructions belong.

The phrases "person, family, and corporate body" and "person, family, or corporate body" and their plural forms are replaced by "agent" and "agents" respectively. Usage of the phrases was standardized in RDA to allow a direct substitution without changing the meaning. It is useful to make the substitution now, to introduce some LRM terminology, to shorten and simplify the text, and to make it easier to translate.

The English indefinite and definite articles ("a", "an", and "the") are removed from the RDA element labels. For example, "identifier for the item" is changed to "identifier for item". This makes the labels of element and designators consistent and provides a template for new elements and designators. This parsimonious approach is tolerable in English, and in common use in technical contexts such as database fields. Translations can include the indefinite article if necessary and done consistently.

It is useful to make these changes to the element labels now, to make it easier to review design and display options for the Toolkit during the project. These options include audio and graphic presentation of element references that are the focus of the instructions.

The RSC will consider wider issues of contextual labels for RDA elements as part of the 3R Project. RDA Reference already supports different sets of element labels for linked data applications and RDA Toolkit, and this can be extended to other audiences.

The definite article ("the") is replaced by the indefinite article ("a" or "an") where it refers to recording an element. For example, "Determine the preferred name for a person from the following sources" at RDA 9.2.2.2 is replaced with "Determine a preferred name for person from the following sources". This change and referencing an element in the singular form

emphasizes that there are no constraints on the repeatability of RDA elements, giving a cataloguing community the choice of recording one or more iterations of any element.

The phrase "and/or" is replaced with "or" in some instructions and element definitions. The change is being made where "or" can be used in the broader, inclusive vernacular sense of "either A or B or both". The change is not being made if the current wording requires additional review for clarification, for example in RDA 2.17.5 (Note on numbering of serials). Further opportunities to extend this simplification will be considered in the 3R Project, and if necessary the introductory content of the Toolkit will give guidance on what interpretation is intended.

The phrase "in this order" is removed from instructions for access points. The RSC decided to make the deletion in instructions for access points when that wording was present in proposals approved at its 2016 meeting; this is now extended to all instructions about access points in RDA. This gives a cataloguing community the choice of constructing access points by following the order of presentation in the instructions or in some other order.