

## **MINUTES OF OCTOBER 2019 MEETING**

### **RDA Steering Committee**

Biblioteca del Congreso Nacional de Chile (BCN)  
and Sommelier Boutique Hotel, Santiago, Chile  
21-25 October 2019

Note: These minutes preserve the order in which topics were discussed, which is not necessarily the order published and numbered ahead of time in the formal agenda.  
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**Minutes** of the fifth in-person meeting of the RDA Steering Committee, held at the Biblioteca del Congreso Nacional de Chile (BCN) and the Sommelier Boutique Hotel in Santiago, Chile, 21-25 October 2019.

**Present:** Catherine Amey, *Oceania representative*  
Linda Barnhart, *RSC Secretary*  
Renate Behrens, *Europe representative*  
Thomas Brenndorfer, *North America representative*  
Gordon Dunsire, *Technical Team Liaison Officer*  
Kathy Glennan, *RSC Chair*  
James Hennelly, *ALA Digital Publishing*  
Kate James, *RDA Examples Editor*  
Ebe Kartus, *Wider Community Engagement Officer*  
Honor Moody, *RDA Examples Editor-Elect*  
Chris Oliver, *Chair, RDA Board*  
Daniel Paradis, *Translations Team Liaison Officer*

**Observer:** Ángela Quiroz Ubierna, *Biblioteca del Congreso Nacional de Chile*

## Monday, 21 October 2019

### Executive Session

11:00 a.m. – 1:00 p.m. in the Sommelier Boutique Hotel

- 159 Welcome, introductions, ground rules, housekeeping**
- 160 Approval of agenda**
- 161 Overall plan and goals for the meeting; Chair report**
- 162 RDA Board Report**
- 163 ALA Publishing Report**
- 204 Regional representative presentations**

### Public Session

3:00 – 5:00 p.m. in the Sommelier Boutique Hotel

- 164 Welcome and introductions (including observers)**

- 164.1 Agenda item is moot, as there was no space for observers in the newly arranged meeting rooms.

## 165 Reports

- 165.1 [Core team reports](#): Core team members did not do a close review of any reports but responded to questions.
- 165.2 Ebe Kartus, Wider Community Engagement Officer, reminded the group that she is working on an update to the RDA FAQ and was asked to add a question/answer about website accessibility and citing RDA. Renate Behrens would like to have the FAQ translated, and Gordon Dunsire observed that regions could create their own FAQs.  
**ACTION ITEM:** Kartus will update the general RDA FAQ and will add questions/answers about accessibility and how to cite RDA.  
**ACTION ITEM:** Behrens will consider translating general RDA FAQ when it is ready.
- 165.3 Gordon Dunsire, Technical Team Liaison Officer, reported that the informal MARC mappings group met virtually the week of 14 October 2019 and is continuing their work, which will appear in the next Toolkit release. This group is responsible for the RDA-to-MARC bibliographic and authority mapping spreadsheets used in the Element Reference section of RDA elements. There was discussion of the issues surrounding the linking of URIs in MARC 21 that distinguish between identifiers (\$0) and IRIs (\$1). The group agreed to leave these mappings as-is unless further information comes to light.
- 165.4 Daniel Paradis, Translation Team Liaison Officer, noted that the Italian and Finnish translation teams have each completed their translation of RDA Reference (both the value vocabularies and the element sets). They will move on to the translation table (a table of the headers and other text on Toolkit pages) and the boilerplate file. Oliver applauded the goal of reviewing the Multilingual Dictionary of Cataloguing (MulDiCat) in languages corresponding to RDA translations to ensure that translations of the standards are in harmony with RDA translations. It might be useful for both Paradis and Hennelly to attend a meeting of the translators in conjunction with EURIG in May 2020.
- 165.5 Kate James, Examples Editor, mentioned that the goals listed in her report are short-term ones that she plans to finish before her term ends in a few weeks. Longer-term goals will be managed by Honor Moody, Examples Editor-Elect. There was some discussion of the need for a MARC tagging protocol or template for policy statement writers; Hennelly will check with the Policy Statement Writers group about this need. The RDA Examples Guide needs to be revised, and James intends to do this. There is not currently a “plan of attack” for adding more examples to RDA; the group was reminded that there are some suggestions

for where examples are needed in the consolidated feedback spreadsheet. Behrens said that EURIG will set up an Examples Working Group, and all would benefit from close coordination.

**ACTION ITEM:** Hennelly will consult with Policy Statement Writers group about a MARC tagging protocol/templates for examples and will notify Kate James if this is needed.

**ACTION ITEM:** Kate James will update and revise the RDA Examples Guide.

- 165.6 Linda Barnhart, RSC Secretary, pointed out that documentation has been started, particularly for content management system (CMS) processes, but much work remains.
- 165.7 [Regional representative reports](#): regional representatives did not do a close review of any reports but responded to questions.
- 165.8 Thomas Brenndorfer, North America representative, described recent changes to NARDAC membership as well as outreach activities and events. His description of the Canadian BIBFRAME Readiness Task Force's activities led to a broader discussion of the relationship between RDA and BIBFRAME, and the intent to map from both sides when BIBFRAME is stable.
- 165.9 Catherine Amey, Oceania representative, voiced concerns for the future, because many libraries are not in a position to develop training materials or application profiles. Preparation and sharing will likely become a responsibility for national libraries. ORDAC hopes for increased outreach within the Pacific region in the future.
- 165.10 Renate Behrens, Europe representative, shared concerns raised in Europe that RDA is a theoretical framework and is not practical for cataloguers. There are general concerns about the interoperability of data; library directors in particular worry that there will be national "flavors" of RDA that will complicate data exchange. Dunsire responded that the granularity of RDA helps with data exchange; the Toolkit is designed to produce many different kinds of RDA but it is all interoperable. This message needs to be more persuasively, frequently, and clearly conveyed.
- 165.11 [Liaison reports](#): Revision of the ISBD standard to harmonize with the LRM will begin with review of the Manifestation entity. There was some discussion about the future of ISBD, and its potential for development as a string encoding scheme. Other liaison reports were accepted without substantive comment.

**Tuesday, 22 October 2019**

**Public Session**

9:30 a.m. – 10:15 a.m. in the meeting room at the BCN

The RSC expressed deep thanks to Quiroz Ubierna and her colleagues at the BCN for generously and quickly arranging a meeting space under stressful conditions.

**166 Western and Christian Bias in the 3R Toolkit Report**

166.1 The RSC thanked Ahava Cohen and her colleagues for preparing [this report](#). Behrens noted that Western and Christian bias has been a longstanding issue. The commitment that the RSC made to not leave anything behind when moving forward from AACR2 was raised by Oliver as a contributing factor. Kate James pointed out that absence of content doesn't necessarily mean bias; it may mean "not applicable." Behrens suggests that RDA must find a way to be as neutral as possible because augmenting the standard with needed detail for all religions and cultures is not possible; this could be left for application profiles or focused policy statements. There was some discussion of terminology, including the idea of "Western culture" and "bias." There was a suggestion that "focus" was a better term. Dunsire confirms that this paper is very timely and is an aspect of re-focusing RDA as an international standard. Amey believes it is not possible to be neutral; it is important to acknowledge this bias and find a way to move ahead.

166.2 Some detailed aspects of the report, such as books of the Bible, dates for the year a degree is granted, and definition of the term "letter" were debated. There is an issue with citing Encyclopedia Judaica, which Kate James volunteered to follow up. The report noted some small editorial problems that could be fixed now, like the "that is" list following "local places of worship" in preferred name of corporate body and the use of "etc." There are also some things in the report that are not accurate. The RSC may wish to follow up and ask for more explanation in certain areas, such as *variant name of RDA entity*. There seem to be a mixture of issues contained in the report, including training and application profile issues.  
**ACTION ITEM:** Dunsire and Barnhart will review the CMS to make editorial changes for local places of worship and "etc." and other editorial problems highlighted in the report.  
**ACTION ITEM:** Kate James will consult an LC colleague about citing Encyclopedia Judaica.

166.3 Discussion led to consideration of the Resources tab, which needs to be overhauled. Locating the Books of the Bible vocabulary encoding scheme there does not send a neutral message. This tab could be set up to share multiple vocabulary encoding schemes for communities.  
**ACTION ITEM:** The Core Team will find a way to make Books of the Bible less prominent in the Resources tab.

166.4 The RSC concluded that expertise is needed from the communities to address the larger issues in this report. There is sufficient workload to consider establishing a task-and-finish Working Group to deal primarily with the religion topics. This would include addressing books of the Bible, the lack of other religious texts, and places in RDA that single out Christianity. Looking at JSC documents may also be useful. A Working Group will be discussed further in conjunction with developing the RSC action plan.

**ACTION ITEM:** The RSC will consider setting up a working group to examine the treatment of religious works in RDA. This will be discussed further when setting up the three-year operational plan (see [192](#)).

### Public Session

10:30 a.m. – 12:30 p.m. in the meeting room at the BCN

### 167 LRMoo Report

167.1 The RSC thanked Pat Riva for sharing [this report](#) and Powerpoint presentation. Dunsire noted that the ongoing development of LRMoo will have no significant impact on RDA. Oliver said that LRMoo will replace FRBRoo and will be more intricately linked with the CIDOC Conceptual Reference Model and its extensions. It is good that the Library Reference Model (LRM) will be tied into this broader level; it will strengthen the potential interoperability of metadata for cultural heritage resources.

### 168 Staff Registry Overview

168.1 Dunsire described technical aspects of the new Staff Registry, which is a backend system that feeds GitHub releases and, from there, the public-facing RDA Registry. The Staff Registry's primary functional purpose is to maintain RDA Reference (all the value vocabularies and element sets in all their translations). Basic functionality for the Staff Registry is in place, but more work is required, including testing the upload and download capabilities, pushing content to GitHub, and scaling. Dunsire will focus on Staff Registry testing and development soon; there cannot be another GitHub release until further work is done.

**ACTION ITEM:** Dunsire will provide analysis and advice for advancing the Staff Registry work

168.2 Dunsire walked the committee through the RDA Registry website, pointing out areas that need further work. There was discussion about administrative access to this site and the skillsets required for continued development and maintenance. The RSC will need to discuss the division of tasks further.

**ACTION ITEM:** The RSC needs to discuss further where to assign responsibility for RDA Registry and GitHub maintenance and development.

## **169 Use of RDA unconstrained element set for display labels**

- 169.1 NARDAC agreed to take on the project of looking at the RDA unconstrained element set to see what problems might arise if it were used as a starting point for “friendly” public display labels. They called upon the American Library Association’s Committee on Cataloging: Description and Access (CC:DA) and the Canadian Committee on Cataloguing (CCC) for assistance. Brenndorfer provided a [written report](#) and a detailed spreadsheet. He started the RSC discussion by giving a broad overview of the group’s work.
- 169.2 Dunsire reminded the RSC that the RDA element labels are not, and never will be intended for public display. Element labels use technical, artificial terminology, analogous to using a code. They are essentially a textual substitute for an IRI in a non-linked data environment. As such, element labels must be unique, short, and consistent. These conditions and requirements must be maintained in all the translations. The purpose of the NARDAC project is to investigate an additional (not a substitute) set of labels, which don’t necessarily have to be unique, short, or consistent, for public display.
- 169.3 Dunsire also reminded the RSC that the unconstrained element set is high-level and generalized and is not part of “base” RDA. It is RDA with the LRM stripped out of it. Its primary purpose is to allow RDA to interoperate, via “dumbing down,” with non-LRM data sets. For example, the unconstrained element set does not use the concepts of domain or range and simplifies definitions to refer to the broadest categories. The terms “agent” and “resource” are used in the unconstrained element set, but they used generically and don’t have the same formal meaning as these terms do in the constrained element sets.
- 169.4 The RSC discussed the value of mapping the IRI for an element to a lookup table where a more user-friendly display label could be found. This is a familiar approach, for example, with MARC tags mapped to user-friendly display labels in online catalogues. This is the ideal way to handle display labels. A completely separate place outside of the Toolkit for this information might be useful for vendors. Another approach would be to add display labels to the RDA Registry, which in turn would pass them on for display in the Element Reference section for each element.

(Discussion continued in the afternoon)

### **Public Session**

1:30 – 2:45 p.m. in the meeting room at the BCN

## Use of RDA unconstrained element set for display labels (continued)

169.5 Discussion centered on specific details in the NARDAC spreadsheet. Some editorial errors in the unconstrained element set surfaced (duplicate elements, inconsistent definitions, “based on a [related] resource”) which will be fixed. Dunsire will continue to work through the spreadsheet, fixing errors in the Registry, and will consolidate comments from Glennan before responding to NARDAC.

**ACTION ITEM:** Dunsire will complete the editorial work; consolidate Glennan's feedback on the spreadsheet; respond to NARDAC with information and questions for NARDAC to decide about followup work on this project.

169.6 The committee raised a question about how broadly NARDAC had looked when recommending user-friendly display labels. To appear in the Toolkit, display labels must have international applicability and not just reflect what would work for one region. NARDAC should check with the other regions if the best approach is display within the Toolkit. Alternatively, the NARDAC work could go forward as-is as a model, with an explanation should other regions wish to do the same. This might be preferable, as it might work better for translators, and such files might be more amenable to external maintenance.

**ACTION ITEM:** NARDAC will consider the information and questions raised by Dunsire and Glennan in their feedback and will decide whether to follow up on this project.

## 170 Agent relationship elements and curator agent

170.1 The [points for discussion](#) prepared by Brenndorfer were a request for early RSC feedback on a potential RDA change proposal that NARDAC intends to put forward. Debate centered on the concepts of exhibition, curator, organizer, aggregator, and events. The group was troubled by a community's insistence on a specific term to describe a relationship; the definition, and not the term, must drive the model. There also appeared to be insufficient understanding that element labels are not display labels.

170.2 The RSC discussed shortcuts and the need to unravel and explain these more fully. Dunsire asserted that shortcuts support a decision made by a cataloguer—a decision not to describe an intermediate entity. With a shortcut, RDA supplies a means for enabling that decision. Nearly all of the shortcuts have to do with aggregates. It is unclear when and how shortcuts and full hierarchies would best be identified.

**ACTION ITEM:** Dunsire will provide more general information in Toolkit about shortcuts and will explain how RDA manages events. [Later in the meeting, Dunsire asked the RSC to review text in Guidance / Introduction to RDA / Data elements that pertains to shortcuts.]

- 170.3 In terms of general future proposal preparation, the RSC concluded that (1) it is useful to have a full explanation of the thinking that went into the proposal (“show your work”) and (2) proposals should show possible solutions.

## 171 Glossary consolidation topics/decisions

- 171.1 Dunsire thanked Anoushka McGuire, chair of ORDAC, for her work on this project. Most of the resolution for this topic is described in the minutes of the September 2019 asynchronous meeting, [agenda item 151](#). In followup discussion, the group reconfirmed that parenthesized labels should not be included in the Glossary where the parentheses are the only change. The RSC agreed to wait on adding more cross references into the Glossary until they could see the output of the fully functional operational script that assembles the Glossary. The group further agreed that it was wiser to use a popup for cross reference definitions in the Glossary rather than an interactive process within an interactive process.

### Public Session

3:30 – 5:30 p.m. in the Sommelier Boutique Hotel

## 172 General, broad discussion of Toolkit strategic development

- 172.1 **Development of the Resources tab:** Hennelly observed that this tab needs better structure and order. The official parts of RDA and the unofficial parts are not clearly delineated. Content is presented as equal to the end user, but it is not equal. Kate James described a specific glitch in breadcrumb display, which Hennelly will investigate. Hennelly asked about the preferred behavior for pop-out submenus in the dropdown for both Resources and Guidance; behavior is now inconsistent. Dunsire noted that the Resources area is expected to grow and advocates pop-out submenus so that a simpler hierarchical list will initially display.

**ACTION ITEM:** Hennelly will investigate the issues with breadcrumb display and will fix them for the next Toolkit release.

- 172.2 **Community RDA and base RDA:** One category in which the Resources tab may need to grow is community-based materials. This could be content that is maintained by others that is not an official part of RDA, such as two resources there now: books of the Bible, and medium of performance. There needs to be further discussion of this concept to see if it is viable, and to delineate its difference from global documents. Hennelly thought this idea was similar to the as-yet-undeveloped concept of “views” of RDA (for example, a “cartographic view” of RDA). “Community” would need to be defined. Behrens is concerned that the Anglo-American community may feel like it is losing something if parts of RDA hypothetically move to a community-maintained area, but she feels it

would enable more international acceptance of the standard. Paradis and Glennan agreed that a full explanation would be needed, as well as a seamless transition. Kate James sees this as a very practical solution, which allows RDA to keep everything but make regional requirements distinct; this would serve both current and future users. Dunsire emphasized that base RDA and community RDA are both RDA. Conceptually, Anglo-American instructions on order and punctuation for access points could be moved to a different area, showing that the RSC is serious about removing Anglo-American focus.

- 172.3 **Better use of the Policies tab:** Kate James noted that policy statements are not part of “official” RDA and wondered if better use could be made of that tab for community-based materials. Dunsire remarked that policy statements are related to application profiles, which could be located on this tab. This could also be a place to hold information about string encoding schemes. The RSC needs to decide what “base” RDA really is; the working description has been the parts of RDA that translators are required to translate. This is important not just conceptually but needs to be formally communicated to users (including through screen readers).  
**ACTION ITEM:** RSC and Hennelly need to clarify the official and unofficial parts of RDA within the Toolkit.
- 172.4 **Vocabulary extensions outside of RDA:** RSC policy is to allow alternative vocabulary encoding schemes (VESs); RDA already includes the books of the Bible and medium of performance in the Resources tab. A conventional collective title VES could also be added here. RSC may get requests from communities to add alternative VESs. Hennelly notes that someone (or some group) must take responsibility for all Toolkit content. There must be some controls, and there may be a cost. Amey is concerned about the ability of communities to maintain this type of content. Kartus suggested that a test case may be a VES for accessibility. It could go into the Documents area, but if an organization owns and maintains it, it could fit into the Registry or under Policies. Dunsire reminded the group that Toolkit can point to external resources.
- 172.5 **Revision history:** This topic was addressed in the September 2019 asynchronous meeting ([agenda item 154](#)). The same Revision history structure will be made available to all the translation teams. The Instruction Archive will also be duplicated for each language.
- 172.6 **Relationship matrix:** The relationship matrix is created by a script run on RDA Registry data. The script takes a long time to process, as it must find and organize all the hierarchical relationships. Because the process is time-consuming and does not always behave correctly, the matrix has not been updated since December 2018. Dunsire described the problem as the complexities of a polyhierarchy versus a simpler monohierarchy. The group reviewed the [Sage Research Methods Map](#) and the [Linked Jazz](#) site as possible avenues for future exploration for the

relationship matrix. The RSC is also interested in identifying community experts who could create a linked data visualization.

**ACTION ITEM:** Dunsire will review the specification for the script that creates the relationship matrix and will advise Hennelly about improvements.

**ACTION ITEM:** Behrens will consult at the DNB to identify expertise in linked data visualization.

- 172.7 **Enhanced element lists in entity chapters:** Kate James wondered about separating the functions of hierarchy and lists of domain and range. This led to a discussion about adjusting the list of elements at the end of each entity chapter by using element type metadata to separate long lists into relationships and attributes. **ACTION ITEM:** Dunsire and Barnhart will review use of element type metadata to improve utility (including filtering) of the element lists and will work with Hennelly to proceed with the development of enhanced element lists in entity chapters.

## Wednesday, 23 October 2019

### Public Session

9:00 a.m. - 10:30 a.m. in the meeting room at the BCN

### 173 Fast Track proposals

- 173.1 The RSC considered [Fast Track proposal 01](#) submitted by Paradis for changes to *Corporate Body: name of corporate body. Names of corporate body in more than one language*. Substantive discussion surrounded the concept of “official language” for a corporate body, a concept that seems to have been lost in the process of adjusting language in the beta Toolkit. Glennan presented a [flowchart](#) that demonstrated the complexity of the instructions. The committee agreed that this proposal uncovered a bigger issue and that it cannot be resolved through the Fast Track process. The RSC will consider establishing a Working Group to discuss the issue of “official language,” including whether to retain this concept and define it in the Glossary. “Official language” appears in five elements, and all need to be considered.

**ACTION ITEM:** The RSC will consider setting up a working group to examine the concept of “official language” in RDA. This will be discussed further when setting up the three-year operational plan (see [192](#)).

**ACTION ITEM:** Dunsire or Barnhart will remove the second condition (as shown in the fifth row of this proposal) in *Corporate Body: preferred name of corporate body. Names of corporate body in more than one language*. The inclusion of this condition was an editorial error.

- 173.2 The RSC considered [Fast Track proposal 02](#) submitted by Paradis for changes to *Corporate Body: authorized access point for corporate body*. The committee agreed in principle with the first recommendation (“Delete the condition ‘A corporate body is a subdivision of the Catholic Church’”) but would like to see a written list of specific changes in order to review the details. The committee also agreed in principle with the second recommendation (“Review conditions and options to remove the term *subdivision* from the conditions and add more specific wording in the options when needed”) and thought work could commence from the Fast Track proposal documentation. The committee did not agree with the third recommendation (“Replace indefinite articles with definite articles in the options when the context warrants it”).

**ACTION ITEM:** Paradis and Barnhart will prepare documentation for the RSC to show where specific text would be deleted for recommendation #1. This can be shared with the RSC via Basecamp and does not need to come back to an asynchronous meeting.

**ACTION ITEM:** Dunsire or Barnhart will edit the CMS to conform to recommendation #2.

**ACTION ITEM:** Dunsire will add information about the use of definite and indefinite articles in RDA to terminology guidance and the editorial guidelines.

Following this agenda item, the RSC walked to the main BCN building for its formal photo and had a brief tour of the BCN.

## Public Session

11:30 a.m. - 1:15 p.m. in the meeting room at the BCN

### 174 Fast Track processes

- 174.1 It was unusual for the RSC to consider Fast Track proposals at an in-person meeting. This was done in the interest of time and for the RSC to get more experience with Fast Track proposals in the post-3R environment. In the future, Fast Track proposals can be raised at any time, and will be escalated to an asynchronous meeting agenda when not be easily resolved.
- 174.2 Having now had experience with three Fast Track proposals under the 3R Project (two here and one at the September asynchronous meeting), the committee discussed how the process could be improved. Fast Track proposals are used only for minor or editorial changes; they must have no substantive impact on the outcome of instructions. Regional representatives may consult with colleagues on Fast Track proposals if desired, but they are also empowered to act independently.
- 174.3 Glennan reviewed the pre-3R process, which included a shared spreadsheet that was used for tracking responses and decisions. The group discussed the advantages and disadvantages of the spreadsheet as well as the new shared tools

now available. The RSC would like to test using Basecamp for the next Fast Track proposal. The discussion process should be separate from the voting process. There would be two phases: first would be a discussion phase, with a deadline for comments. Following the deadline, a voting phase would take place. A separate Basecamp page would be opened for a vote, to include the specific recommendations listed in the proposal as individual comments. Voting RSC members would use the “Boost” feature to vote. The original proposer should be able to modify their Fast Track proposal if they agree with the points in the comments before the voting stage.

**ACTION ITEM:** The RSC will test a new approach using Basecamp with the next submitted Fast Track proposal.

- 174.4 The RSC made numerous suggestions for “best practices” in preparing Fast Track proposals.

**ACTION ITEM:** Barnhart will prepare working guidelines based on these suggestions, including a description of the process, to aid in Fast Track proposal preparation.

**ACTION ITEM:** Barnhart and Glennan will determine a numbering system for Fast Track proposals. Barnhart will adjust numbering for the three Fast Track proposals already considered.

**ACTION ITEM:** Kate James will prepare a template or sample for Fast Track proposals and formal change proposals for inclusion in [RSC/Operations/5](#). See also [177.1](#).

## **175 Communicating Fast Track changes back to RDA users**

- 175.1 For Fast Track proposals: Editorial changes are not communicated to users. Minor changes are reported out through Release Notes. Regional representatives may communicate to their constituencies about Fast Track proposal decisions if they feel it is important.

## **176 Proposal processes and communicating with RDA users**

- 176.1 For formal proposals: Major changes to RDA require formal proposals which must be discussed in either an asynchronous or an in-person RSC meeting. The RSC agreed that proposals could be made at any time. Proposers should consider informing the RSC about the proposal topic as work starts, to enlist collaboration with another region and to prevent duplicate effort. The RSC should consider tracking proposal work that is underway.

- 176.2 Upon submission, the RSC Chair and RSC Secretary will work with the proposer to schedule the proposal. Considerations for scheduling will include time needed for translation and consultation, and (to a lesser extent) the release calendar. It was noted that some proposals may work best at an in-person meeting. Proposals will be posted on the private Basecamp space for RSC discussion purposes.

- 176.3 For pre-3R proposals, formal responses were required from each representative. The RSC agreed that for post-3R proposals, simpler and more informal responses from each representative would be acceptable, similar to the comments made on MARC Advisory Committee proposals. These responses would be managed on the private Basecamp discussion page. This informal interaction could be used to shape a revised proposal.
- 176.4 Proposals will be publicly shared on the RSC website with information about the date of discussion. Pre-3R, responses were publicly posted; post-3R, a summary or table of agreement/disagreement and any substantive comments would be posted on the RSC website.  
**ACTION ITEM:** Glennan and Barnhart will revise [RSC/Operations/4](#) with updated information about the posting of proposal responses.

### Public Session

4:15 p.m. – 6:00 p.m in the Sommelier Boutique Hotel

#### 177 Reviewing/updating Operations documents

- 177.1 This topic was considered at the September asynchronous meeting so full discussion here was not needed. NARDAC undertook a serious review of the Operations documents and will share their input with Glennan and Barnhart for future revision. Kate James volunteered to prepare templates for both Fast Track and formal proposals as part of further development of [RSC/Operations/5](#). RSC members should send suggestions for further changes to the Operations documents to Glennan by 15 November.  
**ACTION ITEM:** RSC members should send suggestions for further changes to Operations documents to Glennan by 15 November.  
**ACTION ITEM:** Glennan and Barnhart will update the Operations documents with NARDAC and other RSC feedback.  
**ACTION ITEM:** Kate James will prepare templates for Fast Track proposals and formal change proposals for inclusion in [RSC/Operations/5](#).

#### 178 Review of the policy for translations of RDA Reference

- 178.1 Paradis described issues with the representation of partial translations on the Translations Working Group. Each full translation (meaning RDA Reference and RDA instructions) has one person on the Working Group, but the partial translations (meaning only RDA Reference) are all represented by one person. This leads to multiple and somewhat duplicative email lists. Paradis recommended that all official translations, partial or full, be represented on the Working Group. Glennan noted that this is a non-traditional working group, as the membership is essentially all *ex officio* and the working group is their primary

communication channel with each other. Hennelly pointed out that unlike other working groups, the membership of this Working Group is necessarily fluid, with people added when new translations are added. There are five official partial translations whose translators would be added to the group. The RSC supported this action, noting the benefits to improved communication.

- 178.2 The RSC reviewed the [draft Terms of Reference](#) and [draft membership/tasks document](#) for the Translations Working Group. Dunsire suggested abandoning the phrase “partial translation” in favor of “RDA Reference translation.” Kate James suggested identifying the RDA Reference translators in the membership list. The RSC agreed and approved the draft documents in principle.

**ACTION ITEM:** Paradis and Glennan will update the draft documents when convenient.

**ACTION ITEM:** Hennelly will work with Paradis to update the email lists for the Working Group.

## **179 Asynchronous meeting experience and expectations**

- 179.1 The RSC reflected on the experience of the September 2019 asynchronous meeting. Oliver was thanked for sharing an email message that can be adjusted to clarify the beginning and ending times across the globe. The group reaffirmed that there are no plans to continue regular monthly RSC phone calls.

- 179.2 It was suggested that a document that outlines the expectations for asynchronous meetings would be useful. If an RSC member is not available to attend, they should arrange for their backup to attend.

**ACTION ITEM:** Glennan will draft a document outlining expectations for members.

- 179.3 A number of suggestions for improvement were made:

- Check in every day; don't wait until the end to contribute
- Add “decision required” to the agenda to make that expectation known
- Add the list of expected participants to the top of the agenda
- Meetings should begin with a formal or informal report from all members
- Build in more time for translation of documents and reading/preparation
- Create a separate project in Basecamp so asynchronous meeting materials are more easily found.

**ACTION ITEM:** Barnhart will set up an area in Basecamp and implement agenda-related suggestions.

- 179.4 Barnhart questioned how to manage the action item lists that will come out of four meetings per year. Action item lists will be a standing agenda item to encourage RSC review. In the future, we may wish to combine these into one checklist.

- 179.5 The RSC agreed to explore having asynchronous meetings scheduled for January, April, and July 2020, with the in-person meeting already planned for October.  
**ACTION ITEM:** Barnhart will consult with Glennan and propose specific dates.

## Executive Session

**190 What do we call RDA after 3R?**

**189 Milestones document**

## Thursday, 24 October 2019

### Public Session

9:00 a.m. - 10:45 a.m. in the meeting room at the BCN

**180 Collective agent next steps**

- 180.1 This is the third RSC discussion of the Collective Agent entity. The first discussion was held on an RSC conference call on 14 March 2019 in response to the paper “ORDAC Review of Collective Agent.” The second discussion was part of the asynchronous RSC meeting held 16-19 September 2019 ([agenda item 153](#)) in response to a followup paper “Review of Collective Agent - further thoughts from ORDAC.”
- 180.2 Glennan presented some initial thoughts on issues requiring clarification or resolution. The ORDAC “further thoughts” paper described issues with entity definitions. The RSC agreed that a better alignment of definitions is needed, noting differences in the way Family, Corporate Body, and Collective Agent definitions are worded. LRM has no preference for the term “bearing a particular name” or “identified by a name,” but RDA should be consistent.  
**ACTION ITEM:** Dunsire will amend the definitions of the Agent entity and its sub-types to improve consistency and clarity.
- 180.3 The ORDAC “further thoughts” paper proposed the creation of a new entity “Collective Event” as a subclass of Collective Agent. Discussion surrounded the way events are treated in the LRM, and in turn, in RDA. Glennan cautioned that conferences cannot be thought of as events but must be considered as collective agents, or some subtype of collective agent.
- 180.4 The RSC discussed the semantic modeling (inheritance) of Collective Agent, Family, and Corporate Body. Amey described issues with some concepts residing at the Collective Agent level, because they must be able to be inherited by Family. Dunsire observed that semantics are inherited downwards but data is “inherited” upwards; for example, *date of birth* is a subproperty of *related timespan of*

*person*, but a specific date could function in both elements. Dunsire urged discipline in modeling discussions and cautioned that entities and elements cannot be moved around without a significant impact on other elements and the implementation of the LRM.

- 180.5 Discussion centered specifically on conferences. Kate James noted that there are two types of conferences: named conferences, and those that are part of a corporate body. Glennan suggested that text in LRM-E8—"meetings, conferences, congresses, expeditions, exhibitions, festivals, fairs, etc."—should be included in RDA with nothing left behind. Dunsire says these are all collective agents with a limited lifespan--an occasional group with defined starting and ending periods. The committee briefly discussed exhibitions and other subtypes as a collection aggregation. The RSC agreed to ignore buildings and spaceships for now.
- 180.6 The RSC agreed that adding a new entity to RDA for occasional groups as a refinement of Collective Agent is a logical next step. There is time to do this work because of the stabilization period, although there was some concern that communities may start asking for a faster implementation in order to move away from the current treatment. Adding a new entity will require focused and detailed thinking; the definition cannot overlap with Family or Corporate Body, and instructions that have been kept together will need to be broken apart. ORDAC was thanked for their excellent work on Collective Agent, but a single region is not in a good position to take this further. Development of such an entity is best suited to a new Working Group.  
**ACTION ITEM:** The RSC will consider setting up a working group to explore creating a separate entity to represent occasional groups in RDA. This will be discussed further when setting up the three-year operational plan (see [192](#)).

## 181 Work boundaries

- 181.1 Dunsire introduced the [Work boundaries](#) briefing paper. This paper provides a description of the issues in determining the circumstances when a new work should be described. The guidance chapter on diachronic works includes guidance on the transformation boundaries of diachronic works. The guidance includes transformations from diachronic works to static works and vice-versa. Feedback suggests that users expect to find this information in association with static works as well as under the topic of diachronic works, and that providing guidance on transformation boundaries of static works--or works in general--would be useful. Dunsire suggested that a representative expression (at the work level) could be used as a starting point to determine when a work boundary has been crossed.
- 181.2 Glennan raised concerns because the LRM does not specifically have a representative expression; it has representative expression attributes. There is

confusion internationally about this, so RDA must be clear. That it is an option to record a representative expression may also be a problem. Dunsire responded that the concept of representative expression is embedded in the beta Toolkit and includes attributes useful for its identification. Providing guidance about work boundaries would not mandate the use of the representative expression but rather would provide a practical solution.

- 181.3 Behrens stated that her colleagues would be excited to have more clarity about work boundaries and that it is an important concept to understand. Moody suggested that an application profile could include use of a representative expression to determine work boundaries from a practical cataloguing perspective.
- 181.4 Question #1: “Should integrated guidance be provided in the Toolkit for determining work boundaries, etc.?” The RSC agreed.
- 181.5 Question #2: “Should additional guidance be provided for static works and their expressions?” The RSC agreed, specifying that the language should be the same both for diachronic and for static works, as resources move between the two. A clearer layout may help. Glossary definitions need to be present and terms must be used consistently.
- 181.6 Question #3: “Should guidance be provided on the use of representative expressions to apply work boundaries?” The RSC agreed. Dunsire suggested that one expression should be chosen, if not the representative expression, as a yardstick to measure the drift and to assess if it has crossed a boundary. RDA cannot say what those boundaries are; these will differ between communities and cultures. This information could be in an application profile. Major and minor changes would be moved to Guidance: Resource Description: Describing a work. The “first five words” criterion is controversial and Anglo-centric; the ISSN IC will have to work on this.
- 181.7 Question #4: “Should additional guidance be provided for the use of work groups?” The RSC agreed, but advised being careful of analogies to external models and to known concerns, such as relating a book and a film. Brenndorfer noted that different aggregating works labeled as Collected Works needs to be explained. RDA needs to be clear that boundaries are culturally determined and that there can be more than one viewpoint.  
**ACTION ITEM:** Dunsire will produce draft guidance on work boundaries for RSC review and will address the concerns about representative expression and work groups.
- 181.8 Question #5: “How do work boundaries fit into the development of use of application profiles?” Dunsire would like community feedback. Behrens believes these will fit well as a linked background document. Moody pointed out that this

would be useful for data validation. This question should be included in the work of the Application Profiles Working Group.

**ACTION ITEM:** Barnhart will add this topic to the task list for the Application Profiles Working Group.

- 181.9 Question #6: “What other aspects of work boundaries, etc. should be incorporated in the beta Toolkit?” The RSC agreed that there are other aspects, such as the “first five words” and possibly other impacts on CONSER. Input from a music expert would be useful. Dunsire will try to identify other latent areas while this work is underway.

### Public Session

11:15 a.m. – 1:15 p.m. in the meeting room at the BCN

## 182 RDA Implementation scenarios

- 182.1 Dunsire reviewed the [RDA metadata implementation scenarios](#) briefing paper and observed that a linked data scenario is missing from the original set of concepts. The RSC supported the first five recommendations in the paper, specifically that
- the content of the implementation scenarios should be updated;
  - the original scenarios should be retained;
  - a scenario should be added for linked open data, with the order of the scenarios being from the most to least sophisticated;
  - alignment between the implementation scenarios, the dataset linking methods and the recording methods should be clarified, and
  - the scenarios should be notated as A, B, C, and D to avoid confusion with the original 1, 2, and 3.
- 182.2 The RSC felt that the sixth recommendation—“Add updated content on implementation scenarios to RDA Toolkit to complement Toolkit resources for application profiles”—was not appropriate for a guidance chapter and suggested that it be added to the same place as application profiles.
- 182.3 The RSC discussed the draft text, which was provided in the briefing paper. Kate James made a number of suggestions, including
- adding an explanation at the beginning of the text to remind users that this builds on earlier work and adds one new scenario;
  - adding a discussion of scenario strengths and weaknesses, and
  - making explicit that scenarios are not mutually exclusive and that agencies may have a mixture.
- 182.4 The revised text should be added to the Toolkit but its final placement was left undecided. The RSC felt that it was inappropriate in Guidance and should be tied into application profiles, perhaps in the Resources tab. Dunsire noted that the text

is not about how to use the Toolkit nor how to interpret the instructions, so perhaps it could be placed in Guidance, maybe in the Introduction to RDA or in the Application Profiles chapter. A final decision was not made. The text includes embedded diagrams (images), which will require some investigation of technical issues for implementation in the CMS, such as image format and sizing requirements, caption translation, and language markup for screen readers. **ACTION ITEM:** Dunsire will revise the text to include Kate James's suggestions and will add the marked-up text to the CMS. He will consult with Hennelly about the technical implementation of the diagrams. The text will then be "parked" until the application profiles work is clearer.

### 183 Expression excerpts

- 183.1 Dunsire presented the briefing paper [Expression excerpts](#) which describes issues in recording extracts of expressions and how they can be resolved. The paper identifies two kinds of expression excerpts: a collection aggregate (compilations of opening lines of poems, quotations, excerpts from musical recordings, etc.) and an augmentation aggregate (a critical study on a monologue from a play, a monologue from a play used to illustrate a text on contemporary drama conventions, etc.) Expression excerpts could also be called "expression fragments" or "expression extracts." An expression can be subdivided in an infinite number of ways. Something arbitrarily extracted from an expression falls into this category, as opposed to a part of an expression. These are not whole-part works. This topic extends LRM concepts, and thus is new and slightly controversial. The Aggregates Working Group has spent considerable time on this. The goal of this discussion is for the RSC to reach agreement on the four propositions articulated in the document.
- 183.2 Proposition #1: "The enumeration or title designation of all its parts is an inherent aspect of a whole-part work." Dunsire began by saying that the evidence of a whole-part work is a distinct appellation connected with the part; this differentiates it from an extraction/excerpt. RSC members gave examples from religious and musical works to test this proposition. Dunsire clarified that an excerpt is not a mash-up nor sampling, which are different. Amey asked about derived works; when an excerpt takes on a life of its own, does it become a derived work? Dunsire replied that a new subtype for the derivation relationship might need to be added.
- 183.3 Proposition #2: "A whole-part work is identified by the enumeration or titles present in a representative expression of the work, which is usually the expression embodied by the first manifestation of the work." This was described as a logical, not a physical difference. There was discussion of the use of representative expression for this purpose or use of another later expression. The connection between this paper and the [Work boundaries](#) paper was noted.

- 183.4 Proposition #3: “An expression excerpt is not an expression part.” Dunsire said that if a bit of an expression that does not have the qualities described in propositions 1 and 2, it is therefore an expression excerpt. He noted that there is no corresponding work excerpt and referred to a quotation taking on a life of its own.
- 183.5 Proposition #4: “An expression excerpt is a distinct expression that realizes the original work or a derived work.” Discussion centered around the idea that expression excerpts would be determined by a community. A substantial excerpt could be an expression in one community, while for another it crosses a work boundary. This should be determined by a community in its application profile.
- 183.6 The RSC had a general discussion weighing whether or not to accept these propositions and agreed that it needed more time to consider them. The group reflected on whole-part and aggregate relationships; excerpts are neither so another way must be found to deal with them. The committee also discussed various approaches to the use of “Selections.” Glennan recommended that someone with music expertise should read and comment on this paper and noted that “excerpt” has a specific meaning in the music community. Kate James suggested broad consultation and reminded the committee of papers on related topics prepared over the last decade ([5JSC/LC/12](#); [6JSC/LC rep/2](#); [6JSC/LC/20](#)). Dunsire suggested that the RSC has not tackled anything like this before and needs to feel comfortable before moving ahead. The six recommendations from the paper can be considered following final responses on the propositions. If the propositions are accepted, the details will fall into place.
- ACTION ITEM:** Brenndorfer will ask Damian Iseminger, former Music Working Group Chair, to review and comment on the document.
- ACTION ITEM:** RSC members will continue to review the paper, including asking for comments from their community, with a deadline for final comments of 30 November.
- ACTION ITEM:** Barnhart will set up a Basecamp page to collect RSC comments.
- ACTION ITEM:** Dunsire will add information to Guidance to clarify whole-part relationships.

## Public Session

3:30 – 6:00 p.m. in the Sommelier Boutique Hotel

### 185 Refresher on appellation elements and instruction moves

- 185.1 Brenndorfer prepared and presented [Points for discussion – Refresher on appellation elements and instruction moves](#) in response to a suggestion at the September 2019 asynchronous RSC meeting. This is useful as a reminder of the principles of where instructions have moved and could assist in preparation for

string encoding scheme instruction relocation (see [192.6](#)). This information may also be useful to policy statement writers.

- 185.2 Several questions were raised in the ensuing discussion. Paradis asked about *title proper* and *authorized access point for manifestation*, which led to a deeper discussion about *title of manifestation*. Dunsire reminded the committee that *title proper* is another label for *preferred title of manifestation*. Issues were uncovered with manuscript instructions and their connection to *title of work*.  
**ACTION ITEM:** Brenndorfer will prepare written recommendations, possibly as a Fast Track proposal, for editorial work to improve manuscript instructions.  
**ACTION ITEM:** Brenndorfer will prepare written suggestion(s) to improve/clarify access point for manifestation, part or iteration.

## **186 Place: authorized access point for place**

- 186.1 Brenndorfer prepared and presented [Points for discussion – AAP for Place](#) as a followup to the September 2019 asynchronous RSC meeting ([agenda item 150](#)). Dunsire described an inadvertent omission of an option in the beta Toolkit instructions to strip a *preferred name of place* down to the narrowest part before constructing an access point. There needs to be an editorial change to restore this outcome that exists in the current Toolkit. There was discussion on the use of gazetteers (vocabulary encoding schemes) and how the use of gazetteers has been unintentionally restricted in the beta Toolkit; this also must be fixed. Dunsire noted that relocating the string encoding scheme instructions will change this discussion. The concerns about preserving existing practice in instructions must be addressed. Brenndorfer's concerns about related problems will need to be deferred for the string encoding scheme instruction relocation and for the post-stabilization period.  
**ACTION ITEM:** Kate James will continue working on access point for place instructions to preserve existing practice.

## **Executive Session**

### **191 Developing a stable Toolkit**

### **193 Orientation Project Webinars and training**

## **Friday, 25 October 2019**

### **Public Session**

9:00 a.m. - 10:45 a.m. in the meeting room at the BCN

### **184 RDA Content elements**

- 184.1 Dunsire reviewed the briefing paper [RDA Content Elements](#) which contains propositions, recommendations, and options for developing expression “content” elements (*accessibility content*, *colour content*, *illustrative content*, *sound content*, and *supplementary content*, and their subtypes) to conform to the aggregates model. This is unfinished aggregates business; these elements do not fit the aggregates model nor the LRM and must be addressed. Dunsire walked the group through the three propositions and five recommendations.
- 184.2 Proposition #1: “An aggregating expression does not accumulate or inherit the characteristics of the expressions that are aggregated.” Dunsire noted that this proposition is highly contentious. The Aggregates Working Group chair strongly disagrees with this proposition. The RSC raised a number of questions but had insufficient time to delve deeply.
- 184.3 Proposition #2: “No descriptive elements for an expression are applicable to an aggregating expression.” This follows from proposition #1. Dunsire said that there are no intrinsic characteristics worth recording.
- 184.4 Proposition #3: “Only the relationship elements for a minimum description are applicable to an aggregating expression.” Kate James raised the issue of content elements for representative expressions, such as *Work: sound content of representative expression*, which have not been addressed in this paper. Dunsire will need to think this through. Dunsire then turned to each content element because, if the propositions are accepted, each has a slightly different resolution.
- 184.5 Recommendation #1: “Redefine or deprecate *Expression: supplementary content* because it is not conformant with the model of aggregates.” One option is to keep this as an expression element but to redefine it so it applies only to the aggregating expression and not to normal expressions. Another option is to deprecate the element altogether. Dunsire thinks it is better to redefine it as a shortcut.
- 184.6 Recommendation #2: “Redefine or deprecate *Expression: accessibility content* because it is not conformant with the model of aggregates.” The same set of options applies, and Dunsire recommended redefining this as a shortcut. The concept of accessibility may be more tied to manifestation, as with large print editions. There is a relationship between accessibility and supplementary content.
- 184.7 Recommendation #3: “Redefine or deprecate *Expression: illustrative content* and *Expression: details of illustrative content* because they are not conformant with the model of aggregates.” Again, the options are to redefine or deprecate. Illustrative content has an RDA vocabulary encoding scheme. Dunsire commented that an expression with different content types seems to indicate aggregation.

- 184.8 Recommendation #4: “Replace *Expression: details of colour content* with a new element for the specific colours found in the content of the expression.” Dunsire noted that there is no RDA vocabulary encoding scheme for this, but many are available (Pantone, etc.). This new element would not be associated with an aggregating expression.
- 184.9 Recommendation #5: “Redefine or deprecate *Expression: sound content* because it is not conformant with the model of aggregates.” Dunsire recommended redefining this element as a shortcut. It is a strange element that attempts to express the absence rather than the presence of something. There are too many use cases to deprecate this element.
- 184.10 The RSC thanked Dunsire for preparing and reviewing this paper and acknowledged that there is much to think about. Before anything else can be done, the RSC must weigh in on the propositions. How these proposed changes would fit in with stabilization must also be considered. Dunsire believes these changes are editorial in nature and would like to see fast change. The RSC needs more time to consider these propositions, recommendations, and options and agreed to a November 30 deadline. Communities, groups, and experts should be consulted, including members of the now-disbanded Aggregates Working Group. The briefing paper may be shared. Brenndorfer would like NARDAC’s input.  
**ACTION ITEM:** Barnhart will make a Basecamp page to collect comments.  
**ACTION ITEM:** RSC members will share the briefing paper with communities and experts and will weigh in on Basecamp by 30 November.  
**ACTION ITEM:** Brenndorfer will collect and share informal comments from the Aggregates Working Group members.

## 187 Handling extent and place/jurisdiction issues

- 187.1 Glennan observed that both extent and place/jurisdiction issues are unfinished RSC business that should be addressed in the RSC operational/work plan. The extent issues are complicated and would mean atomizing parts of the Aspect-Unit-Quantity model proposed in [6JSC/ALA/Discussion/5](#). The place/jurisdiction issues affect multiple elements which need to be identified.  
**ACTION ITEM:** The RSC will consider setting up working groups to explore extent and place/jurisdiction issues. This will be discussed further when setting up the three-year operational plan (see [192](#)).

## Executive Session

11:15 – 1:15 p.m. in the meeting room at the BCN

## 194 Establishing Working Groups and prioritizing tasks

**192 Developing a rolling three-year work plan**

**Executive Session**

4:30 – 5:30 p.m. in the Sommelier Boutique Hotel

**195 Future of the core team**

**196 Future work with BIBFRAME**

**197 RSC Meeting in 2020**

**198 Future RSC meetings**

**199 Outstanding business from this meeting**

**200 New business**

**201 Action items to report from this meeting**

**202 Outcomes for the public report**

**203 Recognizing the outgoing Examples Editor**

*End of the October 2019 RSC Meeting*

The following briefing papers and reports support discussion topics for the RSC meeting in October 2019 in Santiago, Chile:

### **Appendix for Public Minutes**

- 161 [Chair Report](#) (pp. 29-30)
- 165 [Reports by the Core Team](#) (pp. 31-40)
- 165 [Reports by the Regional Representatives](#) (pp. 41-50)
- 165 [Reports by the Liaisons](#) (pp. 50-53)
- 166 [Western and Christian Bias in the 3R Toolkit](#) (pp. 53-58)
- 167 [LRMoo Report](#) (pp. 59-60)
- 169 [Use of RDA unconstrained element set for display labels](#) (pp. 61-66)
- 170 [Points for discussion - Agent relationship elements and curator agent](#) (pp. 66-68)
- 173 [Fast Track Proposal 01](#) (pp. 69-72)
- 173 [Glennan analysis of Language of Corporate Body](#) (p. 73)
- 173 [Fast Track Proposal 02](#) (pp. 74-78)
- 178 [Draft Terms of Reference for Translations Working Group](#) (pp. 78-79)
- 178 [Draft Translations Working Group Membership and Tasks 2020](#) (pp. 79-81)
- 181 [Work boundaries](#) (pp. 81-86)
- 182 [RDA implementation scenarios](#) (pp. 86-93)
- 183 [Expression excerpts](#) (pp. 93-99)
- 184 [RDA Content elements](#) (pp. 99-109)
- 185 [Points for discussion - Refresher on appellation elements and instruction moves](#) (pp. 110-112)
- 186 [Points for discussion - Place: authorized access point for place](#) (pp. 112-118)

## Appendix for Public Minutes

### 161: Report of the RSC Chair for 2018-19

This report covers the period October 2018-September 2019.

#### ***Outreach and liaison activities***

The former RSC Chair, Gordon Dunsire, made presentations on RDA and related topics to the following conferences and meetings:

- 22 October 2018: Outreach event in conjunction with RSC meeting Montréal, Québec “LRM and RDA: Overview of the 3R Project.”
- 22 October 2018: Outreach event in conjunction with RSC meeting Montréal, Québec: “Aggregates and Diachronic Works.”
- 14 November 2018: Presentation at 1er. Coloquio sobre RDA en América Latina, National Library of Mexico, Mexico City: “Cataloguing with RDA.”
- 15 November 2018: Presentation at 1er. Coloquio sobre RDA en América Latina, National Library of Mexico, Mexico City: “RDA Cataloguing and Linked Data.”

The current RSC Chair, Kathy Glennan, made presentations on RDA and related topics to the following conferences and meetings:

- 22 October 2018: Outreach event in conjunction with RSC meeting Montréal, Québec: “Recording methods, transcription, and manifestation statements.”
- 08 November 2018: AMIGOS Online Conference keynote presentation: “Evolution of the RDA Toolkit and its Impact on Catalogers.”
- 26 January 2019: Presentation at RDA Forum, ALA Midwinter Meeting, Seattle, Washington: “Getting Beyond Beta: Next Steps in Finalizing the New Toolkit.”
- 28 January 2019: Presentation at “A Deeper Dive into RDA,” ALA Midwinter Meeting, Seattle, Washington: “New Ways of Working? The RSC in the Post 3R Era.”
- 19 February 2019: Presentation at the Music OCLC Users Group Meeting, St. Louis, Missouri: “The New RDA Toolkit: Everything Has Changed – or Has It?”
- 22 February 2019: Presentation at the Music Library Association Annual Meeting, St. Louis, Missouri: “The New Expression of RDA (not RDA 2.0).”
- 19 March 2019: Video presentation at Council on East Asian Libraries Cataloging Workshop, University of Colorado at Boulder Libraries: “RDA 3R Project Updates.”
- 2 May 2019: Presentation at the Program for Cooperative Cataloging Operations Committee Meeting, Washington, DC: “RDA 3R Project – Stabilization Phase.”
- 2 May 2019: Presentation at the Program for Cooperative Cataloging Operations Committee Meeting, Washington, DC: “Demo: Using the Beta Toolkit to Catalog a Simple\* Monograph.”
- 3 May 2019: Panelist with Ed Jones (National University) and Damian Iseminger (Library of Congress) at the Program for Cooperative Cataloging Operations Committee Meeting, Washington, DC: “Follow-up panel discussion on RDA 3R Project updates.”

- 10 May 2019: Webinar presented with James Hennelly: “Getting a Handle on the New RDA Toolkit.”
- 22 June 2019: Presentation at RDA Forum, ALA Annual Meeting, Washington, DC: “Stable but not Unchanging: Next Steps for the Beta RDA Toolkit.”
- 22 June 2019: Presentation at the Committee on Cataloging: Description and Access meeting, ALA Annual Meeting, Washington, DC: “RDA in English is Stable: Now What?: Introduction” and “RDA in English is Stable: Now What?: Future Processes for Changes to RDA.”
- 21 August 2019: Video presentation at the IFLA Satellite Meeting “RDA: Resource Description and Access 2019,” Aristotle University of Thessalonika Library and Information Centre: “Practical Implications: A Look at Cataloguing a Book Using the New RDA.”

Links to most presentations are available at <http://www.rda-rsc.org/rscpresentations>.

The RSC Chair (Dunsire) attended private meetings to discuss the impact of the 3R Project on cataloguing administration and management:

- 2 Oct 2018: British Library, Boston Spa, England

The RSC Chair participated in meetings of:

- Meeting with representatives of the Organizer Group of the Annual BIBFRAME Workshops in Europe, along with other members of the RSC: 24 June 2019.
- RDA Board (Dec. 2018, Mar. 2019, May 2019, Sept./Oct. 2019)

#### ***Committee-Related Initiatives, 2019***

- Facilitated the weekly Core Team calls.
- Chaired search committee for new RDA Examples Editor.
- Implemented Basecamp for asynchronous discussions and decision-making.
- Initiated monthly RSC calls.
- Reviewed/updated or created RSC policy and procedure documents.
- Disbanded existing task-and-finish RSC Working Groups.
- Created first “fast track” proposal after RDA stabilization.
- Planned and led first RSC asynchronous meeting.

#### ***Major Goals for Next Year***

- Continue outreach efforts.
- Establish expectations for ongoing asynchronous meetings.
- Fill the Technical Team Liaison Officer position (incumbent’s term ends Dec. 2020).
- Update protocols as needed.
- Establish new task-and-finish working groups.
- Work with the RDA Board to set strategic directions for RDA development.

Kathy Glennan  
RSC Chair  
September 30, 2019

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## 165: Core Team Reports

### 2019 report of the RSC Secretary

Contributions to the 3R Project:

- Edited RDA content for consistency in wording and markup; provided and fixed links for cross references and re-used content; added navigational aids to files with extensive content. Major push for stabilization of English RDA content for April 30 release
- Created new CMS files as needed for newly added elements
- Assisted with keyref implementation, including re-organization of the keydef map
- Assisted with maintaining DITA maps, including the keydef map
- Reviewed and analyzed RDA content in the staging site, beta site and CMS to provide information for decisions, and to identify issues following script changes and data re-load
- Provided input into technical decisions (markup choices; script adjustments; metadata)
- Created and maintained spreadsheets for element editing status to facilitate communication
- Participated in weekly calls about process and content with core team and RSC
- Prepared agendas for weekly calls
- Organized material in Google Drive for group access
- Trained others in using the CMS and Web Author tool as needed
- Prepared documentation for RDA content and CMS processes: 15 documents prepared and shared in Google Drive; documents by others reviewed and edited
- Participated in the Policy Statement Writers working group
- Provided input on “shell” development for policy statement linking in CMS (More Bang script)
- Provided input on common/collective title issues in RDA
- Provided input on release note development
- Assisted with managing and responding to user feedback
- Maintained ongoing Milestones and Synchronization documents

Assisted in planning the 2018 Montréal meeting and 2019 Santiago meeting:

- Planned meeting logistics in collaboration with core team and local hosts
- Assisted Chair in developing the agenda
- Assisted Chair with preparation of briefing papers
- Assisted with the outreach meeting in Montréal

After the October 2018 meeting in Montréal:

- Prepared meeting minutes (both restricted and public versions) and Action Items
- Assisted Chair with preparation of meeting outcomes

- Prepared articles for IFLA Metadata Newsletter based on meeting outcomes

As a member of the core team:

- Monitored email communications with the Translations Working Group
- Assisted in preparation of the RSC Annual Report and Board reports
- Assisted with moving activity to Basecamp for better sharing and collaboration
- Participated in recruitment of Examples Editor position
- Provided input to policy document revisions
- Provided support for asynchronous meeting

To communicate with cataloguing communities:

- Posted documents and presentations on RSC website
- Drafted and posted announcements on RSC website
- Sent email messages about postings to lists
- Coordinated significant update to 3R FAQ and reorganized Documents page

At ALA Midwinter and ALA Annual meetings:

- Assisted with preconference planning
- Assisted with preparation for “deep dive” sessions (in CC:DA time slot)
- Prepared summaries of RDA meetings for publication in ALCTS News
- Provided consolidated feedback from Washington, DC preconference attendee evaluations
- Provided support for meeting with BIBFRAME representatives in Washington DC

Major Goals for 2020:

- Continue to improve editorial consistency in RDA, implement changes under the direction of the RSC, and work toward a smooth transition in editorship
- Support the implementation of translations and policy statements, including CMS training as needed and other processes as we work through the initial release(s)
- Continue to improve documentation of editorial decisions and processes
- Assist in editing the Staff Registry as needed
- Create smooth transition to regular asynchronous meetings

Submitted by Linda Barnhart  
Secretary, RDA Steering Committee  
27 September 2019

## **2019 Report of the RDA Examples Editor**

### 3R Activities:

- Participated in weekly calls about process and content with core team, core team plus, and RSC
- Provided examples for RDA
- Created DITA maps for examples
- Assisted RSC Secretary with organizing keydef DITA map
- Provided technical assistance with DITA and Oxygen issues
- Contributed to sections of the CMS Guide, an internal document for use by RSC, translators, and policy statement writers
- Provided feedback on RDA Toolkit content

### Outreach Activities:

- 25 January 2019: ALA Midwinter. RDA Toolkit Redesign Workshop. Served as a table Leader. Selected examples for tables, created PDFs and wrote “Using the Beta RDA Toolkit” for workshop participants.
- 28 January 2019: ALA Midwinter. Presentation on “Relationship Elements”
- 21 June 2019: ALA Annual. RDA Toolkit Redesign Workshop. Served as a table leader. Selected examples for table, created PDFs and RIMMF records, and revised “Using the Beta RDA Toolkit” for workshop participants.

### Other Activities:

- Served on selection panel for next RDA Examples Editor
- Provided examples training for RDA Examples Editor

### Ongoing Goals:

- Continue to transfer existing examples to new RDA and provide examples for new elements.
- Examine elements covered by existing policy statements and other policy documentation in the original Toolkit and provide examples for equivalent or closely related elements in the new Toolkit with the assumption they will be need for new policy documentation.
- As new policy documents are added to the Toolkit or made publicly available, develop examples for RDA elements covered in these documents in order to assist those user communities with training.

### Short Term Goals:

- Revise existing RDA Examples Guide by the end of 2019.
- Provide example template file for examples in MARC format for policy statement writers.

Submitted by Kate James  
RDA Examples Editor, RDA Steering Committee  
30 September 2019

## **RSC Technical Teams Liaison Officer**

### **Technical Working Group**

The RSC Technical Teams Liaison Officer chairs the RSC Technical Working Group.

The RSC Technical Working Group has not been active during the 3R Project.

The working group is in transition within the new governance structure for RSC, as one of the two permanent working groups. Membership of the group has been dissolved and members have been invited to nominate themselves for membership of the reconstituted group. The new membership will be expanded in size and coverage, following a call for other nominations from RSC and relevant external groups.

Goals for the next year will be set by RSC in due course.

### **3R Core Team**

The RSC Technical Teams Liaison Officer is a member of the 3R Core Team and advises on the technical aspects of the 3R Project.

Specific activities in 2019 included:

- Editorial development of the beta Toolkit.
- Review of feedback on the beta Toolkit from RDA communities and individuals.
- Development of a strawman document on RDA role elements and gender, for discussion by the RDA Translations Working Group.
- Consolidation of the content of the boilerplate used in the beta Toolkit.
- Work with colleagues from the RSC Aggregates Working Group on developing the treatment of common and collective titles in the beta Toolkit.
- Work with colleagues from the RSC Aggregates Working Group on developing shortcut elements for contributors to aggregates.
- Development of draft terms of reference and tasks for an RSC Application Profiles Working Group.
- Provision of documentation on the context of application profiles in the beta Toolkit, and technical advice on the application profile being developed by EURIG.
- Production of a spreadsheet of RDA element data to support the development of RDA application profiles.
- Work with Anoushka McGuire, chair of ORDAC, on a project to review the current and beta Toolkit glossaries to ensure that current entries are correctly migrated to the beta Glossary.

The project identified and corrected typos and missing cross-references. The RSC is finalizing decisions on resolving some duplicate entries and providing references for labels that have a change of punctuation.

- Provision of technical support and advice to the NARDAC project on user-friendly labels.

### **3R Project Policy Statement Writers Group**

The RSC Technical Teams Liaison Officer is a member of the 3R Project Policy Statement Writers Group and advises on technical aspects of the development of policy statements in the beta Toolkit.

Specific activities in 2019 included:

- Production of a spreadsheet of RDA element data to support the development of RDA policy statements.
- Production of a list of elements with mappings to MARC 21 to support prioritization of the development of policy statements.

Goals for the next year:

- Completion of technical development of infrastructure for the maintenance and display of policy statements in the beta Toolkit.
- Development of technical integration of policy statements with RDA application profiles.

### **3R Project MARC Mappings Development Group**

The RSC Technical Teams Liaison Officer is a member of the 3R Project MARC Mappings Development Group and advises on technical aspects of the maintenance and display of mappings from RDA elements to MARC 21 in the beta Toolkit.

Specific activities in 2019 included:

- Further development of spreadsheets for maintaining the mappings.
- Transformation of the spreadsheet data to linked data formats for publication in the releases of RDA Vocabularies on GitHub.
- Development of mappings for linked data URIs.

Goals for the next year:

- Development of improved display of MARC 21 mappings in the beta Toolkit.
- Development of infrastructure for maintaining the mappings to improve integration with Toolkit production workflows.

### **Translations Working Group**

The RSC Technical Teams Liaison Officer is an ex-officio member of the RDA Translations Working Group and advises on technical aspects of the maintenance of translations of RDA Reference in the RDA Registry and the development of processes for translations of the beta Toolkit.

Specific activities in 2019 included:

- Further development of technical aspects of translations processes for the beta Toolkit.

- Liaison on translation requirements for the Staff Registry.
- Improvement of the consistency of wording in RDA Reference using feedback from translations teams.

Goals for the next year:

- Completion of technical development of translations processes and infrastructure.

### **RDA Development Team**

The RSC Technical Teams Liaison Officer is an ex-officio member of the RDA Development Team and advises on technical aspects of the development of policy statements in the beta Toolkit.

Specific activities in 2019 included:

- Liaison with Dakota on development of the Staff Registry.
- Liaison with Dakota on migration of the RDA Registry infrastructure from the Open Metadata Registry.
- Update of RDA Registry website for the stable releases of RDA Vocabularies.
- Ongoing maintenance of RDA Vocabularies.
- Liaison with TMQ on the development of RIMMF4, based on the beta Toolkit.

Goals for the next year:

- Completion of initial implementation of the Staff Registry.
- Development of RIMMF4 to support RDA application profiles.
- Development of the Toolkit Relationship Matrix.

### **Activities related to RDA**

24-28 Jan 2019: Participant in ALA Midwinter 2019 conference, Seattle, USA.

20-25 Jun 2019: Participant in ALA Annual 2019 conference, Washington, D.C., USA.

2-5 Mar 2019: RDA study visit to Dominican Institute for Oriental Studies, Cairo, Egypt.

6 Mar 2019: RDA study visit to Bibliotheca Alexandrina, Alexandria, Egypt.

18-21 Mar 2019: Participant in 7. Bibliotheks Kongress, Leipzig, Germany.

2 Apr 2019: Participant in RDA Translations workshop, EURIG annual meeting, online.

13 May 2019: Meeting with TMQ on development of RIMMF4, Harris, Scotland.

7 Jun 2019: Participant in The future of cataloguing: a CIGS World Cafe Workshop, Edinburgh, Scotland.

10 Jul 2019: RDA study visit to British Library, Boston Spa, England.

22 Jul 2019: Participant in meeting of PCC Metadata Application Profiles group, online.

12 Aug 2019: Presenter of Application profiles, in the Special topics workshop series of RDA webinars.

21 Aug 2019: Participant in IFLA satellite meeting on RDA: Resource Description and Access 2019, Thessaloniki, Greece.

22 Aug 2019: Participant in IFLA satellite meeting on Metadata specialists in the machine age, Thessaloniki, Greece.

24-29 Aug 2019: Participant in IFLA World Library and Information Congress, Athens, Greece.

30 Aug 2019: Participant in ISBD review meeting, Athens, Greece.

## Presentations

25 Jan 2019: Application profiles and cataloging a manifestation. Presented at RDA Toolkit Redesign Workshop, ALA Midwinter 2019, Seattle, USA.

27 Jan 2019: The LRM and its impact on RDA and related standards. Presented to ALCTS Bibliographic Conceptual Models Interest Group, ALA Midwinter 2019, Seattle, USA.

28 Jan 2019: A deeper dive into Nomen and appellations. Presented at A Deeper dive into RDA, ALA Midwinter 2019, Seattle, USA.

28 Jan 2019: A deeper dive into application profiles and policy statements. Co-presented with James Hennelly at A Deeper dive into RDA, ALA Midwinter 2019, Seattle, USA.

28 Jan 2019: RDA linked data update. Presented at RDA Linked Data Forum, ALA Midwinter 2019, Seattle, USA.

19 Mar 2019: Anyone can say Anything about Any thing: RDA: Eine globale Metadatensprache für Kultureinrichtungen. Co-presented with Renate Behrens to 7. Bibliotheks Kongress, Leipzig, Germany.

22 Jun 2019: Customizing RDA for local applications. Presented at What now?, CC:DA meeting, ALA Annual 2019, Washington, D.C., USA.

24 Jun 2019: RDA linked data stuff. Presented at RDA Linked Data Forum, ALA Annual 2019, Washington, D.C., USA.

21 Aug 2019: The new version of RDA: structure, key concepts and content. Presented at the IFLA satellite meeting on "RDA: Resource Description and Access 2019", Aristotle University of Thessalonika Library & Information Centre, Greece.

21 Aug 2019: RDA Toolkit: the facilities within the new version.

Gordon Dunsire  
RSC Technical Team Liaison Officer  
29 September 2019

## 2019 Report of the Translations Team Liaison Officer

### ***Outreach activities***

Presented on RDA at the following meetings:

- 8 November 2018: Joint meeting of the New York State-Ontario (NYSO) and New England (NEMLA) chapters of the Music Library Association (MLA) and of the Quebec Chapter (SQACBM) of the Canadian Association of Music Libraries, Archives and Documentation Centres (CAML), Montréal, Canada. Presentation on “The Well-Tempered Catalogue: the new RDA Toolkit and music resources” (with Damian Iseminger);
- 21 January 2019: Meeting of the Canadian Linked Data Initiative’s Francophone Working Group, Montréal, Canada. Presentation on RDA and linked data (“RDA et les données liées”).

### ***Liaison activities***

Attended meetings of the core team and of RSC via conference call.

Implemented a new process to release RDA Reference files to translators using Google Sheets in order to minimize risks of errors and simplify file management; instructions available on the wiki were revised consequently; element sets and the RDA Terms vocabulary were released on the wiki on February 25, along with comparison reports detailing the changes made since the previous release of the element sets in April 2017.

Answered queries from translators via email and added more detailed instructions about the translation process on the wiki.

Provided various sets of RDA Reference files at the request of the Estonian (new translation), Finnish, and Swedish translation teams.

Attended via conference call the RDA translators’ meeting held on May 2, 2019, in Budapest, Hungary, in conjunction with the 2019 EURIG members' meeting.

Attended three online training sessions (April 23, May 14, and June 4 2019) with James Hennelly on using SDL Trados Studio and SDL Trados GroupShare to manage translation projects; these sessions were also used to make decisions on how to prepare for the project managers and translators training sessions on using the SDL Trados softwares.

On July 22, 2019, provided an orientation session on the element set translation process to the Spanish translation team.

Helped prepare the translators training sessions scheduled in September and October 2019 by providing the trainer with:

- vocabularies necessary to create the termbases that will be used by the translation teams;
- test files to translate;

- file type settings that are intended to facilitate the translators' work by hiding parts of the instructions that don't need to be translated using the SDL Trados softwares or not at all.

### ***RSC Translations Working Group activities***

The Working Group provided feedback on the labels and definitions in RDA Reference by reporting typos and making revision suggestions for clarity and consistency.

### ***Goals for the coming year***

Prepare guidelines for the translation of RDA Reference and of the RDA Toolkit.

Explore the possibility for the Working Group to:

- review the translations of IFLA standards such as LRM and Multilingual Dictionary of Cataloguing (MulDiCat) in languages corresponding to RDA translations to ensure that translations of the standards are in harmony with the RDA translations;
- develop a policy/process for including RDA terminology (e.g. neologisms) in translations of IFLA standards.

Submitted by Daniel Paradis  
Translations Team Liaison Officer  
September 30, 2019

## **Report from the Wider Community Engagement Officer 2019**

The WCEO took part in 3R teleconferences and engaged with Basecamp discussions throughout the year. The WCEO also took part in RDA Marketing Working Group calls.

The WCEO undertook to review Toolkit FAQs. This task will be finalized before the Santiago meeting.

A MARC/RDA Working Group, convened by the Library of Congress, is on the cusp of starting work. The tasks of the Group are to look at how to incorporate changes into MARC21 resulting from the changes to Toolkit as part of the 3R project. It will be a small group of experts and the RSC will be represented by the WCEO.

The user group community of the ILMs used by the WCEO's workplace has a linked open data group. As a member of this group the WCEO has stressed the potential in the new Toolkit. The WCEO also attended the American user group meeting and spoke with various vendor team members present.

With the stabilization of the English text, reaching out to other systems vendors, especially the mid-sized to smaller ones may be more fruitful in the coming year. Even though this topic has been on the Board's agenda it may be worth revisiting.

As an ORDAC member she has taken part in meetings and tasks set by RSC.

*Major goals for next year*

Work on Application profiles as a member of the Working Group

Consider how to reach out to communities who may have implemented RDA but currently have no representation on RSC nor are actively translating beta Toolkit to discover their engagement with the new Toolkit and explore if there is a way to support them transitioning to the new Toolkit.

A stretch goal would be to explore the feasibility of outlining some specifications/statements that could be included by libraries in future tender documents on how to support data created using current beta Toolkit guidelines. This would require collaboration with the Technical Working Group.

It would still be interesting to explore the potential of a booklet, or possibly even an application profile, on how to use RDA for card catalogues.

Ebe Kartus  
Wider Community Engagement Officer  
October 2019

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## 165: Regional Representative Reports



Photographer: Blanka Nagy, National Széchényi Library

### Report from the Europe Region Representative to the RDA Steering Committee

Renate Behrens, September 2019

The RDA Restructuring and Redesign Project (3R Project) reached an important milestone on April 30 when the new RDA Toolkit was released in the English version. For all user communities in Europe the adaption processes started which include mostly the translation and the adjustment of existing policy statements and working documents.

The European RDA Interest Group (EURIG) has decided to work together in this context as close as possible. This decision was activated during the EURIG annual meeting on 2-3 May in Budapest. The members of EURIG would prefer RDA to be more than an international standard to support data exchange, and would like to avoid decay into disparate application profiles and local rules etc. which would result in national or language-based RDA derivatives with only a theoretical framework behind.

The diversity of language and culture in EURIG entails long lead times for 3R implementation, and this puts pressure on achieving application profiles and examples soon enough to be useful for implementation planning. EURIG cannot wait for the RSC if it will cause delay to translations and the creation of training materials, but has no wish to go down a separate path from the RSC.

As most of the European countries have to translate the standard wholly or partially, terminology is an important topic. So a translators' meeting took place in connection with the EURIG meeting in Budapest and the discussion on the RSC Translation Working Group's mailing-list is very helpful in this context.

The British Library and the German National Library are part of the Policy Statement Working Group. Here we try to support the RSC Technical Working Group chair and ALA in planning the implementation process for the policy statements from the old Toolkit to the new Toolkit website. In this context it has become clear that a general revision of our policy statements will not be possible in this first step. We have to bring them into the new structure and have to make sure that everything will be inserted in the right place. Nevertheless, we started with first inquiries in our working groups about their experience in using the actual policy statements for a fundamental revision later on. Tests were made by bringing the existing policy statements into the new environment. We estimate that a third of the policy statements can be transferred into the new Toolkit directly, a third should be reworked, and a third should be revised completely.

For the time being, the European communities can not give a reliable statement when the implementation of the new Toolkit will be ready for practical cataloguing and how much time the adaption work will take. Most of the implementers estimate that training cannot start before the end of 2020 or early 2021.

### **Application Profiles**

The new RDA will provide more of a framework for cataloguing than regulations. So application profiles for work in practice will be needed. The European RDA Interest Group discussed this issue in the 2018 meeting in Copenhagen. There was a broad consensus that the members of EURIG do not want to have several manifestations of RDA in the future like RDA-DACH, RDA-Danish, RDA-Italian etc. They agreed that there should be a minimal consensus for an application profile for all resources and, based on this, application profiles for special communities or materials. In Fall 2018, EURIG recommended the RSC to work out such a general, international application profile. The goal should be an international application profile approved and endorsed by the RSC and available directly via the RDA Toolkit and outside with free access as well.

The DACH community has been working with such a general application profile since the first implementation of RDA in 2016. Based on this, the EURIG Editorial Committee worked out a first draft in winter 2018/19 and sent it to the RSC for comments at the end of March. In Summer 2019 the RSC agreed to set up a RSC Working Group for Application Profiles and the revised EURIG draft is the basis for the work in this group. The EURIG Editorial Committee is working on a fine-tuning of this draft and a coordination of local needs. All members of EURIG are informed about this approach and will be invited to comment on the draft of the Editorial Committee in the near future. Drafts for Application Profiles for special resources, like music, judicial or religious works, will follow later on.

Furthermore, EURIG is in contact with wider communities working on potential application profiles like the Program for Cooperative Cataloguing (PCC) and is strongly interested in international solutions.

A planned IFLA satellite meeting on RDA in Dublin 2020 will be dedicated mostly to the work on application profiles.

### **Examples**

For many years the European community has criticized the lack of international examples in the existing RDA Toolkit. Most of them are Anglo-American based and not easily transferable for the needs of further communities. Associated with the implementation process after 3R, European communities will work out many examples e.g. for training issues. EURIG wants to coordinate this process as well. A EURIG Examples Working Group will be set up in the near future for this task and will support the internationalization of the standard RDA itself in cooperation with the RSC Examples Editor.

### **Rare and special materials**

The work with specialized communities and for special materials progressed in several communities. The need for application profiles for these materials is confirmed and will be one of the tasks in the next year. Furthermore, EURIG will try to coordinate the different approaches in these fields in the near future.

An example for a first RDA application profile for a special community may be highlighted in the new standard RNAB ([Rules for cataloguing with authority data in archives and libraries](#)).

A working group in DACH dealing with cataloguing in literary archives updated their existing standard according to RDA and actualized it. This first application profile for RDA and the resources in literary archives was published in May 2019. It is a first approach in this direction worked out under the lead of the Austrian Literary Archive in Vienna, the Swiss Literary Archive in Berne and the State Library in Berlin, and monitored by the Office for Library Standards at the DNB and an expert team from museums, archives and libraries. The new standard RNAB is based on the current RDA and it was clear that it has to be revised in the near future. Nevertheless, the working group voted for its publishing before the end of the 3R project because there is a strong need for the revised standard in this community.

Also in the field of special and rare materials, the European working groups have a strong focus on internationalization and try to keep in contact with further international working groups.

### **Authority Data**

One important topic in the last years concerning authority data has been the opening of the European databases for more institutions holding cultural heritage. There are many projects concerned with this tasks and it will be a challenge in the near future to provide RDA applications for the non-library community to describe authority data.

### **General Data-Protection Regulation (GDPR)**

Since last year, all European institutions are in the process of adapting all our workflows according to the GDPR. To coordinate this process most of the EURIG members participate in the VIAF GDPR and data privacy working group.

### **Current Dates**

- EURIG annual meeting 2020 will be held on 18-19 May 2020 in Munich, hosted by the Bavarian State Library.
- A translators meeting is planned in connection with the EURIG annual meeting.
- A satellite meeting "RDA in Europe" is planned for the WLIC 2020 in Dublin, Ireland.

## Personal news

New EURIG Executive Committee since May 2019

- Chair Ahava Cohen, National Library of Israel
- Vice-Chair: Hanne Hørl Hansen (Danish Bibliographic Agency)
- Secretary: Jenny Wright (Chartered Institute of Library and Information Professionals, UK).

All information about EURIG <http://www.rda-rsc.org/europe/>

## North American RDA Committee Representative

Report to RSC

30 September 2019



## Background

The North American RDA Committee (NARDAC) was formed in January 2018 to represent the North American region on the RDA Steering Committee (RSC) in accordance with the new RSC governance model. The NARDAC terms of reference (accessible at <http://rda-rsc.org/northamerica>) were approved November 2017 by the American Library Association, the Canadian Committee on Cataloguing, and the Library of Congress. NARDAC is intended to function as an umbrella committee to represent the North American region but not replace the three existing constituent communities.

## Membership

The membership of NARDAC consists of: two representatives from the American Library Association (Dominique Bourassa, Yale University, and Stephen Hearn, University of Minnesota); two representatives from the Canadian Committee on Cataloguing (Thomas Brenndorfer, Guelph Public Library, and Nathalie Mainville, Library and Archives Canada); and two representatives from the Library of Congress (Damian Iseminger and Kate James). Kate James left the Library and Congress and NARDAC in September 2019. Stephen Hearn replaced Kathy Glennan at the beginning of 2019, and a replacement is being sought for Kate James as of the writing of this report.

Current NARDAC roles and incumbents:

NARDAC chair: Dominique Bourassa

NARDAC representative to the RSC: Thomas Brenndorfer

NARDAC backup representative to the RSC: Kate James

Coordinator of web content: Damian Iseminger

## **NARDAC Activities**

NARDAC members met virtually via GoToMeeting eight times in this reporting year: October 12, November 16, December 10, February 11, March 18, April 17, May 29, July 8, and September 9.

NARDAC took on several RSC assignments, including a review of the language in a sample of element pages, and a review of friendly labels that could be used in public displays of RDA element names. NARDAC also provided feedback on reports produced by other regions, such as on application profile development and on changes to the language regarding collective agents.

In the past year, NARDAC discussed the proposal process for revisions to RDA. At the end of the reporting period NARDAC was testing out the revision process by processing a proposal from the region.

## **Changes to the terms of reference**

During our November meeting, we reviewed the NARDAC terms of reference (ToR). After discussion, we proposed the following amendments:

- limiting the term of the RSC representative to two years with a limit of no more than two consecutive terms (to correct a discrepancy between the ToR and the RSC documents);
- limiting the length of term of the back-up RSC representative to 2 years with no limit on the number of consecutive terms an individual can serve in this position;
- adding a requirement to consult with both the regional organizations and the RDA Board before changes to the ToR are approved.

Our proposed changes have been approved by the Association for Library Collections and Technical Services, CCC, LC, and the RDA Board.

## **NARDAC outreach (Oct. 1, 2018 – Sept. 30, 2019)**

The RDA Forum that is held during ALA Midwinter and Annual conferences is now jointly owned by the ALA Digital Reference and NARDAC. It has become a standing venue to keep ALA constituencies informed of RDA development and to communicate important information.

### Thomas Brenndorfer - events and activities

During the reporting year. Developed content for the appellation elements in the new Toolkit, and assisted in the text stabilization process.

October 16, 2018. Innovative Users Group Meeting, Hamilton, Ontario. Presentation “The Library Reference Model and the New RDA Toolkit.”

January 25, 2019. ALA Midwinter Conference, Seattle, Washington. Table leader “RDA Toolkit Redesign Workshop.”

January 26, 2019. ALA Midwinter Conference, Seattle, Washington. RDA Update Forum. Presentation “RSC Montreal Update.”

January 28, 2019. ALA Midwinter Conference, Seattle, Washington. A Deeper Dive into RDA. Two presentations: "Appellation elements" and "RDA-ONIX Framework: New Content Types and New Carrier Types."

May 3, 2019-present. Canadian Committee on Cataloguing representative on the Canadian BIBFRAME Readiness Task Force. The goal of the task force is to produce a plain-language description of BIBFRAME for the Canadian library community and to conduct a survey of Canadian libraries related to BIBFRAME readiness and understanding.

June 21, 2019. ALA Annual Conference, Washington, D.C. Table leader "RDA Toolkit Redesign Workshop."

June 22, 2019. ALA Annual Conference, Washington, D.C. RDA Update Forum. Presentation "RDA Hot Topics."

August 7, 2019. RDA Orientation New Concept Series. Webinar "Relationship Elements."

#### Dominique Bourassa - events and activities

October 22, 2018. Outreach event, Montreal, Quebec, Canada. Presentation (with Nathalie Mainville) "NARDAC : les neuf premiers mois".

January 25, 2019. ALA Midwinter Conference, Seattle, Washington. Table leader "RDA Toolkit Redesign Workshop."

January 26, 2019. ALA Midwinter Conference, Seattle, Washington. RDA Update Forum. Presentation "News from NARDAC: The North American Region at Year One."

April 5, 2019. New England Technical Services Librarians Association Spring Conference, College of the Holy Cross, Worcester, MA. Hands-on Session "The RDA Toolkit: From Fear to Cheer in an Hour."

June 22, 2019. ALA Annual Conference, Washington, D.C. Chair, RDA Update Forum.

Aug. 2019-Present. Consultant, LC-PCC Task Group on Element Labels in Beta RDA Toolkit.

#### Stephen Hearn – events and activities

June 22, 2019. ALA Annual Conference, Washington, D.C. RDA Update Forum. Presentation "RDA Update."

Aug. 2019-Nov. 2019. Co-chair with Manon Th  roux of the LC-PCC Task Group on Data Provenance in Beta RDA Toolkit.

#### Dominique Bourassa and Stephen Hearn – events and activities

January-April. Collected comments on the beta Toolkit from the revived CC:DA 3R Project Task Force, under the leadership of Robert Maxwell, Brigham Young University and forwarded them to RSC via the NARDAC representative to the RSC.

July 2019. Worked with the CC:DA 3R Task Force and ARLIS/NA on a proposal to add a new element for curator at the work level. Although the proposal was not moved forward to the RSC at this time, the insight NARDAC gained from this process will help us better define how future North American proposals will be handled.

#### Damian Iseminger - events and activities

November 8, 2018. Joint Meeting of the New York State-Ontario Music Library Association, the New England Music Library Association, and the Quebec chapter of the Canadian Association of Music Libraries, Archives and Documentation Centres, Montreal, Quebec, Canada. Presentation (with Daniel Paradis) "The Well-Tempered Catalogue: The New RDA Toolkit and Music Resources."

February 8, 2019. Bridging the Spectrum 11th Annual Symposium, Catholic University of America, Washington, DC. Presentation "RDA, Linked Data and the 3R Project."

July 16, 2019. LC Digital Future and You, Library of Congress, Washington, DC. Presentation (with Kate James) "Anticipating the New RDA."

#### Nathalie Mainville - events and activities

October 22, 2018. Outreach event, Montreal, Quebec, Canada. Presentation (with Dominique Bourassa) "NARDAC : les neuf premiers mois".

In the past year, Library and Archives Canada (LAC) launched its new library system Aurora, hosted by OCLC. English-language authority records are now created in the Name Authority Cooperative Program (NACO) file, and French-language authorities are created in a separate file, named Canadiana. Moving forward with RDA, LAC has worked on the MARC Authority Mapping for RDA and initiated work on application profiles.

#### Kate James - events and activities

Kate James, who left the Library of Congress and NARDAC in September 2019, continues in her role as the RDA Examples Editor until the end of 2019. In the past reporting year, Kate presented at and participated in American Library Association conference events and at the Library of Congress.

#### **Major goals for next year**

Effective interaction with the constituent groups is a major goal for NARDAC, which will be essential as the new RDA Toolkit replaces the current Toolkit, and new operational procedures are implemented. The development of application profiles and policy statements represents some shift in responsibility from the RSC to local constituents, and NARDAC will continue to develop as a hub for providing support and sharing information. Training and outreach continue to be important goals for all NARDAC members, and support and direction will be provided to constituent groups that take on training responsibilities.

Respectfully submitted  
Thomas Brenndorfer (NARDAC Representative to the RSC)

## **ORDAC report to the RDA Steering Committee, 2018-2019**

In 2018-2019 ORDAC focused on providing feedback to the RSC on the new RDA Toolkit, and publicising RDA within our communities. We have continued to refine our organisational structure.

The demands of the 3R Project have limited our ability to reach out to other communities in Oceania. Once the new Toolkit becomes 'official', we hope to approach library communities in the region who have not yet fully adopted RDA. This work will include our planned survey of the current 'RDA landscape' in Oceania.

### **Contributions to the RSC**

Areas where ORDAC has offered feedback to the RSC on the new Toolkit include:

- Commenting on the revised RSC policy and procedures documentation, especially in the area of 'Policies and procedures for updating RDA content'
- Reviewing the treatment of the entity 'Collective Agent' and circulating a discussion paper
- Reviewing RDA Glossary terms for inconsistencies, a project that was completed by ORDAC Chair Anoushka McGuire
- Participating in a final review of the new Toolkit before stabilisation of the English text
- Reviewing the Appellation elements
- Commenting on the structure of element pages in the new Toolkit, and the location of navigation instructions
- Offering feedback on a sample of 30 RDA elements
- Commenting on specific elements:
  - Work: Coverage of content
  - Agent: Editor agent of text
  - Person: Country associated with person
  - Person: Fuller form of name
- Contributing our thoughts on:
  - the Guidance and Resources menu
  - application profiles
  - developing punctuation patterns
  - wording issues

### **Internal communications**

We continue to communicate through email, teleconferences, and contributions to a shared wiki. ORDAC met approximately monthly in 2018 and 2019, and our meetings have included regular reports from the RSC representative and the RDA Board representative. We have found the work around reviewing Collective Agent to be particularly engaging, and we have enjoyed some interesting conversations in relation to the new Toolkit.

### **Documentation**

The ORDAC Terms of Reference have been revised to reflect to the transition from the Australian Committee on Cataloguing (ACOC) to ALIA Community on Resource Description (ACORD). This change has coincided with adjustments to the membership requirements for the Australian and New Zealand representatives. Other changes included removing the requirement for face-to-face meetings, which are not practical. These changes have been approved by the RDA Board, and the ORDAC web page has been updated.

### **Outreach**

ORDAC has publicised RDA developments within the Australasian cataloguing communities, forwarding announcements about learning opportunities such as the Orientation Project. Cataloguers in Australia and New Zealand have signed up for the Orientation Project. All ORDAC members are working to increase understanding of the Beta Toolkit at the institutions at which we work.

ORDAC took over management of the Australian RDA Discussion email list, renaming it rdaoceania and broadening the scope to cover the Oceania region. The new list will be an important conduit for communications about the new Toolkit. There has been significant community interest already, with over 80 new subscriptions, and some interesting discussions.

We have added further content to the [ORDAC sub-page](#) on the RSC website, including information about the [rdaoceania discussion list](#), and a [Resources](#) page where presentation slides, recordings, and other training materials and documentation can be posted.

ORDAC's planned survey of RDA implementation in our region has been delayed, partly because the pre-IFLA RDA survey in 2018 covered some of the same ground. We plan to run a more detailed version of the survey once the new Toolkit becomes official, to gauge the level of engagement with RDA and potential training needs.

In December 2019, we had a brief discussion with Te Whakakaokao (a group of New Zealand indigenous subject experts) around Western bias in the new Toolkit. We plan more outreach in this area post 3R when there is time to take a considered approach.

### **Representation**

Our membership has changed slightly, as we thanked outgoing RDA Board member Amelia McKenzie for her work, and welcomed Kim Gutchlag from the National Library of New Zealand as a new RDA Board member. We welcome more diverse representation from within Australia, New Zealand and the Pacific and we hope that the ORDAC survey and IFLA 2022 will offer opportunities to make and strengthen connections.

### **Major goals for next year**

ORDAC's goals for 2020 include:

- Publicising RDA developments and training opportunities with our region
- Contributing to RSC work as appropriate
- Further developing the ORDAC web page on the RSC website
- Supporting Oceania communities to develop plans for implementation and training

Submitted by Catherine Amey  
27 September 2019

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## **165: Liaison Reports**

### **IFLA Bibliographic Conceptual Models Review Group**

I am the RDA Steering Group liaison on IFLA's Bibliographic Conceptual Models Review Group (BCMRG).

The group holds two meetings during IFLA; I attended both meetings in August 2019.

The main activity of the group is the ongoing development of LRMoo, and object-oriented version of the IFLA Library Reference Model that is a foundation standard for the new RDA Toolkit. LRMoo will replace FRBROO and be fully integrated into the CIDOC Conceptual Reference Model. This is unlikely to have a negative impact on RDA, but it will strengthen the potential interoperability of metadata for cultural heritage resources. Further information about this work is available as a separate report and presentation to IFLA's Committee on Standards by Pat Riva, who leads this project.

The new Chair of BCMRG is Mélanie Roche (BnF).

The major goal for next year, with respect to RDA, is to continue to monitor the LRMoo project and advise RSC of any impact on RDA.

Gordon Dunsire  
RSC Technical Team Liaison Officer  
29 September 2019

## Report from the RSC Liaison to the IFLA ISBD Review Group

Renate Behrens, September 2019

For the last several years the ISBD Review Group has worked through an intensive and controversial discussion process about the future of the ISBD. On the one hand, the ISBD is a free IFLA standard and can be used by communities who are not able to use a more complicated or cost-intensive standard. On the other hand, the actual ISBD is no longer appropriate for the use in modern environments and for types of publications evident in cultural institutions. The LRM itself as a basis for all IFLA standards brought a further need for a revision. It was agreed that this revision should be started for the manifestation level first.

A part of the group does not see any sense in a short-term actualisation and voted for a general revision. So in August 2018 an ISBD Editorial Group was set up to make proposals for a revised ISBD. The group, with members from the BnF, the DNB, Biblioteca Alexandria and the ISSN Centre, held a three-day meeting in Paris in November 2018 and worked out a strategic proposal for the update of the ISBD. After a commentary phase in early 2019 it became clear that a part of the ISBD Review Group would not support such a radical change. So, the work was suspended and was resumed in a whole day meeting at the end of WLIC 2019 in Athens.

The ISBD Review Group agrees that the standard has to be actualised and the requirements and proposals coming from the user communities worldwide have to be inserted. So the topic debated was on the methodology to be followed in order to accomplish the urgent short-term revision and the complete renewal of the ISBD.

It was decided that there should be two subgroups that will work in parallel and report independently to the ISBD Review Group.

- *ISBD for Manifestation Study Group*, with the task to make a proposal for a genuine revision of the ISBD according to the IFLA LRM, starting with the manifestation level. It was proposed that the ISBD for Manifestation Working Group would produce a working document entitled "ISBD for Manifestation", which would list elements, scope notes, definitions and stipulations. The role of this working group is to break down the ISBD into Manifestation elements, aligning the ISBD Manifestation elements to LRM, including a gap analysis and the addition of elements if needed.
- *ISBD Content Update Study Group*, with the task to fulfill the actual requirements coming from the user communities.

This new approach will be reported to the Committee on Standards and the groups will start their work after a positive decision of this committee.

## IFLA PRESSoo Review Group

I am a member of IFLA's PRESSoo Review Group.

There was no meeting of the group during IFLA this year. The Chair of the group stood down at the beginning of the year, and a replacement is likely to be made before the end of this year. The placement of the group within the IFLA standards infrastructure is in transition, but this will not be finalized until IFLA completes a broader restructuring of its units, which is expected next year.

This has no impact on the development of PRESSoo, which is considered complete and stable. PRESSoo is not being further integrated into LRMoo, which will supersede FRBRow in the CIDOC Conceptual Reference Model.

PRESSoo will be used as a basis for the development of the ISSN Manual to improve alignment of ISSN metadata with the IFLA Library Reference Model.

The major goal for next year, with respect to RDA, is to continue liaison on the development of this standard and advise RSC on any impact on the treatment of diachronic works in RDA.

Gordon Dunsire  
RSC Technical Team Liaison Officer  
29 September 2019

## Permanent UNIMARC Committee

I am an informal technical consultant to the Permanent UNIMARC Committee (PUC) and act as a liaison for the RDA Steering Committee.

The PUC develops UNIMARC on a continuous basis and holds a formal annual meeting separately from IFLA. It holds an informal meeting during IFLA, which I attended in August 2019.

Both UNIMARC/Bibliographic and UNIMARC/Authorities have been updated recently. I informed the PUC that the RDA element sets are stable enough to develop a mapping to UNIMARC, and that the beta Toolkit is designed to accommodate such mappings. The PUC is keen to progress this.

However, the linked data representation of UNIMARC/Bibliographic is incomplete, and the data for UNIMARC/Authorities is waiting for upload into the Open Metadata Registry (OMR). This is not scheduled for completion until after May 2020. I therefore suggested that the initial mapping should be to UNIMARC 'strings' using a similar approach as for the mappings to MARC 21. This can then be replaced with a full semantic mapping in due course. The PUC has given me access to the UNIMARC files so that I can carry out some preliminary work on a string mapping.

IFLA has signed a contract for the development of the OMR for the IFLA namespaces. This should provide the stability needed for RDA to recommend or otherwise indicate that UNIMARC value vocabularies, such as Medium of performance, are suitable for use with the new Toolkit. There is very little information about the detail of the development work, but existing namespaces are expected to be migrated to the new registry by May 2020. RSC should wait until this is completed and more information is available before carrying out further work on this issue.

The major goal for next year, with respect to RDA, is the development of RDA to UNIMARC mappings and the utility of UNIMARC value vocabularies for use in RDA.

Gordon Dunsire  
RSC Technical Team Liaison Officer

29 September 2019

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## 166: Western and Christian bias in the 3R Toolkit

A draft report by Ahava Cohen

[Ahava.cohen@nli.org.il](mailto:Ahava.cohen@nli.org.il)

In attempting to identify Western and Christian bias in the Beta Toolkit I was assisted by Carol Rigby (Inuktitut cataloguing specialist, Canada), Elliot Williams (Digital Initiatives Metadata Librarian, University of Miami Libraries), Catherine Amey (Authority Record Coordinator, National Library of New Zealand Te Puna Mātauranga o Aotearoa) and Melissa Parent (Metadata Coordinator, State Library Victoria). All pointed out that bias can appear both in what is in the Toolkit and in what has been excluded.

While there was a great deal of interest in the project, there were few who responded with specific instances of bias. Indigenous librarians at WLIC 2019 pointed out that in many cultures younger members (those most likely to become involved in a project of this sort) do not yet feel it is their place to speak out. Removing bias will, therefore, not be a one-time fix but must wait for non-Western metadata specialists to feel the time is right to share their knowledge. In addition, ORDAC pointed out that indigenous libraries are undertaking a lot of volunteer work at this point and without funding may not be free to take on more.

The identities and interests of the informants informed the types of biases reported, which in general were in three areas: personal names, religion, and spelling/grammar.

### General comments:

1. [Marc Discussion Paper No. 2018-Dp09](#) was rejected, in part, because it would mean "moving in a direction away from RDA's 'manifestation statement' of a single, undifferentiated string of characters derived from the preferred source." Cataloging agencies working in a multilingual cataloging environment find themselves forced to choose one language of a multilingual flip format resource as primary because of RDA and MARC (which is trying to stay in line with RDA).
2. The phrase "a preferred language" is still understood by many to mean that only one may be preferred. It has been suggested by libraries cataloging in multiple languages that "authorized" may be a better term. Another option is to make it clear, for example in a general guidance note, that one agency may have multiple preferred languages and scripts, even for different elements within a single metadata work.

3. A similar problem exists with the general understanding of articles in other "preferred" entity pages. In multicultural societies people and places bear multiple names and it is unclear whether each can be given equal weight or if one must be chosen as preferred.
4. Different cultures have different notions of privacy (for example, indigenous bereavement terms in some Aboriginal cultures) which might influence creation of preferred and variant names for agents and access points.
5. The entities Family & Collective agent may not be broadly enough defined to cover non-Western cultures. There is no mention of tribes in RDA, though in some cultures that is an important method of identification. The family connection within a tribe might be so far back that it does not meet the RDA standard. Some tribes might meet the definition of Collective agent (for example, Iwi-hapū names of indigenous groupings in Aotearoa) while others (for example Jewish tribes) might not.
6. Relationships between agents may not be sufficient to describe non-Western cultures. (For example, tūpuna, whānau, uri etc.)
7. Non-Western concepts of IP rights: Should indigenous groups be included as entities that can have creative and ownership relationships?
8. Guidelines referring to languages and cultures do not always sync with the practices of those language communities/cultures but rather with the understanding and practices of the authors of AACR2. (For example, abbreviations and forms of names.)
9. It is even more challenging to identify what is missing from the Toolkit. The RSC and the RDA Board must decide if they want to be reactive and wait for complaints or proactive. If reaction is chosen a special path for report bias should be created so that it can be treated separately from typos and errors. If proaction is chosen, a starting point may be to assemble local and language based RDA guidelines and identify lacunae in the Toolkit. Either option will require a great deal of assistance from librarians from other cultures.

### **Specific comments (hardly an exhaustive list):**

#### **Variant name of RDA entity**

- Does not allow for cultures in which preferred and variant names may be transmitted in ways other than print. (Contacting the agent is becoming more common even in Western countries yet recording a variant presented by the agent is not an option.)
- Does not allow for variant names to be created by different spelling schemes (e.g. Hebrew plene and defective spelling schemes or Soviet Yiddish vs. Polish Yiddish)
- Options for abbreviations allow for full stops or lack of full stops. Some languages use other marks to signify abbreviations, such as apostrophes or double apostrophes. (Other pages, such as access point for work, add the phrase "and other marks of punctuation".)

#### **Addressee collective agent**

- A work might be addressed to a group beyond the scope of "collective agent" (e.g. Maimonides's Letter to Yemenite Jews).

#### **Appellant/appellee elements**

- Seems to assume a single type of hierarchical court system. Many cultures and countries have religious and civil courts and the Appellant/Appellee elements do not cover appeals from one system to the other.

#### **Conventional name - Autocephalous patriarchates, archdioceses, etc.**

- Rule set for one religion only

#### **Conventional name – Religious orders and societies**

- Example is only Christian

#### **Conventional name - Local places of worship**

*A corporate body is a local place of worship that is a church, cathedral, monastery, convent, abbey, temple, mosque, synagogue, etc.*

- Does "place of worship" really need religion-specific examples to be understood?

#### **OPTION**

*Record a value that is chosen in this order of preference:*

*1. a form of name containing the name of any person, object, place, or event to which a local church, etc., is dedicated or after which it is named*

- In this option "church" is always given as the default
- Point 1 is unclear – what does and doesn't the etc. cover? Would this rule apply to all nouns including topicals (for example, Ahavas Achim ["brotherly love"] in Highland Park, PA)?

#### **Preferred title of religious work**

Placing Christian religious works first in all sections shows bias.

All sections to do with the Bible are bias to the Christian canons.

- The split into Old and New Testaments is a Christian bias.
- Part of the Bible instructions and options assume the cataloger will be looking at the resource from a Catholic or Protestant point of view

Group of books of the Bible:

Options allow recording chapter and verse in roman or Arabic numerals. Other cultures may use other numbering systems, such as the Hebrew *gematria* (letters as numerals).

Parts of the Talmud:

In general:

The *Encyclopaedia Judaica* option gives preference to English terms in transliteration. There is no explicit option to record a title in a language preferred by the agency or the language of the Talmud.

*Order. tractate, or treatise of the Talmud:*

The option does not allow for recording what the Toolkit calls "the Talmud" as "Talmud Bavli," which is the more precise title.

*Part of the Mishnah and Tosefta:*

The *Encyclopaedia Judaica* option gives preference to English terms in transliteration. There is no explicit option to record a title in a language preferred by the agency or the language of the Mishnah/Tosefta.

*Midrash:*

The *Encyclopaedia Judaica* option gives preference to English terms in transliteration. There is no explicit option to record a title in a language preferred by the agency or the language of the Midrash.

*Separately published component of compilation of midrashim:*

There is no option for recording chapter and verse within the book of the Bible as a subdivision of a preferred title for the midrashim.

Theological creed, confession of faith etc.

There are religions whose confessions of faith are traditional and do not stem from acceptance by denominational bodies. Indeed, there are religions for whom denominational bodies do not make liturgical decisions at all.

*Jewish liturgical work:*

The option gives preference to English terms in transliteration. There is no explicit option to record a title in the language of the liturgy.

There is no reference made to the well-established titles of liturgy in Hebrew (In the Israel National Authority Database).

I'm not quite sure the connection between corporate bodies and Jewish liturgical works.

Many, many religions are missing in the list of possibilities.

**Books of the Bible:**

Perhaps this resource should be off-loaded to the IFLA Anonymous Classics area

<https://www.ifla.org/node/4957>? That is a space in which each religious group may create their own list, eliminating a source of Christian bias.

**Name of person:**

Many elements of non-Western names are missing such as

- tribal terms used as parts of names (both indigenous and religious)
- matronymics & patronymic (not really covered by *include a value of Person: name of person of another person* or *consist of a phrase that is a value of Person: name of person of another person*)
- names based on author's works

#### **Preferred name of person:**

Names of person consisting of a given name or a word or phrase – Option: In case of doubt, record a value in a native or adopted language of a person, or the Latin form

- Instances of these types of names are not limited to Latin names.

#### *Names of person in more than one spelling*

- Option does not account for official language academy mandated spelling changes or changes in spelling caused by migration within the same language community.

#### **Access point for person:**

It is unclear whether "a value" means "one and only one" or "one or more" which would impact access points for persons living in more than one culture simultaneously

- Religious declarations masquerading as other elements (e.g. Jerusalem on title page)
- Have language specific instructions been checked with those language communities?
- Conflation of text for those who prefer reading English with instructions for working with English language resources
  - Hyphenation of dates in RTL (e.g. -1938)
  - Capitalization rules
  - Spacing of initials and acronyms

#### **Initial articles:**

It appears that the instruction *Omit the articles listed...* was created by Anglophones/ In the vernacular not all articles in the **Initial articles listed by language** are omitted. It should be ascertained, in languages where those articles are omitted, how much of that policy can be attributed to MARC and to AACR2 rather than to the capability of ILS and discovery layers or to the needs of patrons.

There is no guidance for handling articles which are part of names (such as the Māori Te, He, Ngā etc.)

#### **General guideline for capitalization** (and its associated files):

Still seems to be general, though not every language is bicameral. For those without capital letters, the sentence "Capitalize words according to the guidelines for the language involved unless otherwise instructed." is nonsensical.

### **Extent of manifestation**

#### *Misleading numbering*

This is an issue which has been raised in the past. The Talmud is numbered as leaves with text on both sides of the page. The first option is "see Misleading numbering". Though there is a second option, calling any religion's sacred text "misleading" is problematic. In addition, the second option would likely not be adopted by catalogers; as the pagination of the Talmud was set by Daniel Bomberg in 1523 catalogers do not note the numbering vs. text issue.

### **Title of manifestation**

#### *Devised title*

There are no guidelines about cultural sensitivity in devising titles. The Australian Collections Management Branch devises titles for original pictures, manuscripts, and oral histories with conscious efforts to eliminate any offensive or sensitive terms. The title proper or caption of an item, if containing terms offensive to First Nations, is recorded in the notes fields.

### **Year degree granted**

*Definition:* A timespan during which an academic degree is conferred by a granting institution or faculty.

Western practice may be to grant the degree in the year during which the work was completed, but many Middle Eastern countries grant degrees to following year if work is submitted after a certain date. Catalogers can only be expected to know the year on the manifestation; there can be no expectation that catalogers in countries granting degrees at a delay will have the resources to ascertain the year the degree was actually granted.

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## 167: LRMoo Report

**LRMoo Working Group  
Report to Bibliographic Conceptual Models Review Group  
2018/2019  
Submitted by Pat Riva**

The LRMoo Working Group was constituted in Wroclaw, Poland, August 2017. Initial members: Pat Riva, Patrick Le Boeuf, Melanie Roche, Maja Zumer. In October 2017 Trond Aalberg joined the WG.

Charge: To revise FRBROO ver. 2.4 to bring it into alignment with IFLA LRM, thereby producing a new major version. Work jointly with the CIDOC CRM SIG to ensure ongoing harmonisation of conceptual models between the library and the museum domains.

Members of the LRMoo Working Group attended three in-person meetings during the year, all of them in conjunction with meetings of the CIDOC CRM SIG.

November 27-30, 2018, Berlin, Germany: Melanie, Pat (by Skype)  
March 26-29, 2019, Heraklion, Crete: Melanie, Trond, Maja  
June 11-14, 2019, Paris, France: Melanie (host), Pat, Trond, Patrick

Next meeting:  
October 22-25, 2019, Heraklion, Crete

For all CIDOC CRM meeting announcements, agendas and full minutes see: [http://www.cidoc-crm.org/meetings\\_all](http://www.cidoc-crm.org/meetings_all)

### **November 27-30, 2018, Berlin, Germany.**

Approved revised scope notes for major classes: F3 Manifestation, F5 Item, and new Fxx Collective Agent. Approved revised scope notes for relationships: R4 *embodies (is embodied in)*, and the new relationship Rxx *has part (forms part of)* (subproperty of R10 *is member of*).

Discussed the mapping for LRM-E3-A3 Intended Audience with the understanding that the audience is not generally a group (E74 Group), rather people who share one or more characteristics. The CRM property P103 *was intended for (was intention of)* seems close to the desired semantics, but the scope note does not cover this case in its existing wording.

Working draft LRMoo-FRBROO version 0.2.

### **March 26-29, 2019, Heraklion, Crete.**

Significant streamlining of classes specific to performances and recordings in favour of the general classes F1 Work, F2 Expressions. This is in the spirit of generalization of LRM.

Proposed a new class Fxx Externalization which is a superclass of F2 Expression and relates to both F31 Performance and F28 Expression Creation. This provides a point of linkage for actual performances whether they are recorded or not.

The scope of the new CIDOC family model CRMsoc (Social) which covers social relationships intersects with FRBROO classes F51 Pursuit and F52 Name Use Activity, used in the modelling of bibliographic identities. Proposal to transfer these concepts to CRMsoc.

Discussion of serials, and the derivation and transformation of works.

Reconsideration of the class F17 Aggregation Work and reframing the modeling of aggregates.

Working draft LRMoo-FRBROO version 0.3.

**June 11-14, 2019, Paris, France.**

(Minutes not yet posted).

Worked through the FRBROO 2.4 to LRMoo decisions document and either confirmed, filled in, or continued discussion on remaining unresolved items. The LRMoo model is considerably more compact than FRBROO 2.4. Classes that are the equivalent of CRM classes are removed, others transferred to CRMsoc (decision confirmed), and greater generalization results in removing specialized subclasses of F1 Work, F2 Expression, etc.

Reviewed the CLP properties, several deprecated and reformulated the ones retained to fit with the revised definition of F2 Expression and F3 Manifestation.

Approved in principle a revised scope note for the CRM property P103 *was intended for (was intention of)* to broaden it so that it can be used to map the LRM Intended Audience attributes.

Working draft LRMoo-FRBROO version 0.4.

At this point the mapping LRM(er)-LRMoo is close to complete.

Most of the FRBROO 2.4 classes and properties have been reassessed, and the decision tracking document is being reworked into a “transition” document from FRBROO 2.4 to LRMoo.

Since June, Pat is working with a post-meeting working draft LRMoo-FRBROO (version 0.5) to continue the editorial aspects in preparation for the October meeting. This should identify any remaining substantive issues.

Work in progress:

- Finalization of the mapping
- Completion of scope notes modifications (consistency, editorial)
- Review of examples
- Detailed checking for consistency in structure (super/sub classes and properties, validity of domains and ranges of all properties)
- Preparation of class and property hierarchies
- Listing of CIDOC CRM classes and properties essential for implementation of LRMoo
- Rewriting of introduction, textual and graphic model overviews
- Editorial review throughout for consistency
- Decision on functional scope of LRMoo compared to FRBROO ver. 2.4

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## 169: Use of RDA unconstrained element set for display labels

### Introduction

In July 2019, NARDAC was tasked with:

- Review the suitability of the RDA unconstrained element set to store user-friendly element labels.
  - Check that RDA elements have a corresponding unconstrained element.
  - Check that unconstrained element labels are consistent.
- Develop a method for easy determination and maintenance of general user-friendly labels.
- Develop a set of general labels.
- Identify relevant issues.

NARDAC members were helped in this task by the Committee on Cataloging: Description and Access 3R Task Force and a member of the Canadian Committee on Cataloguing.

### Methodology

For each element:

- Review the preferred label for consistency with the Registry label of the constrained element(s).
- Propose an amendment to the preferred label if required for consistency, parsimony, and distinctiveness. The utility of the preferred label in interoperability applications must not be impaired.
- Propose a user-friendly label based on a de-verbalization of the preferred label, or the preferred label(s) of the constrained element(s), or some other basis if justified.
- Report on any issues arising from this work.

### Principles

- Use verbalized forms (has/is) as standard for friendly labels;
- Use unconstrained forms as a starting point.

## Issues and Recommendations

### Unconstrained element set

#### Elements to merge?

According to the RDA Registry, “Each property in the element set has semantics which are independent of the LRM model and has no specified domain or range.” For instance, the constrained access point elements have been merged into one unconstrained element: “has access point for entity” and its inverse “is access point for entity of.” However, there is a lack of consistency: several elements seems to

still have domain and range. These elements could be deleted, keeping only the top level entity elements.

- For example, there are identifier elements for agent, entity, and resource:
  - has identifier for agent
  - is identifier for agent of
  - has identifier for entity
  - is identifier for entity of
  - has identifier for resource
  - is identifier for resource of

The “agent and resource” elements above could be merged under the unconstrained element “has identifier for entity” and its inverse “is identifier for entity of.” The simpler labels “has identifier” and “is identifier of” could replace the current labels.

- There are category elements for agent, entity, and resource:
  - category of agent
  - category of entity
  - category of resource

These elements could be merged under the same unconstrained element: “has category”.

- There are related elements with the “domains” and “ranges” agent, entity, nomen, place, resource, and timespan. All the following elements could be merged under one true unconstrained element “has related entity.”
  - has related agent of agent
  - has related agent of entity
  - has related agent of nomen
  - has related agent of place
  - has related agent of resource
  - has related agent of timespan
  - has related entity of agent
  - has related entity of entity
  - has related entity of nomen
  - has related entity of place
  - has related entity of resource
  - has related entity of timespan
  - has related nomen of agent
  - has related nomen of entity
  - has related nomen of nomen
  - has related nomen of place
  - has related nomen of resource
  - has related nomen of timespan
  - has related place of agent
  - has related place of entity
  - has related place of nomen
  - has related place of place
  - has related place of resource

- has related place of timespan
  - has related resource of agent
  - has related resource of entity
  - has related resource of nomen
  - has related resource of place
  - has related resource of resource
  - has related resource of timespan
  - has related timespan of agent
  - has related timespan of entity
  - has related timespan of nomen
  - has related timespan of place
  - has related timespan of resource
  - has related timespan of timespan
- It might also be possible to limit the name/title, and the preferred and variant name/title elements into the top level entities as it was done with the authorized access point elements:
    - “has name”
      - has name of agent
      - has name of entity
      - has name of place
      - has name of timespan
    - “is name of”
      - is name of agent of
      - is name of entity of
      - is name of place of
      - is name of timespan of
    - “has preferred name”:
      - has preferred name of agent
      - has preferred name of entity
      - has preferred name of place
      - has preferred title of resource
      - has preferred name of timespan
    - “is preferred name of”
      - is preferred name of agent of
      - is preferred name of entity of
      - is preferred name of place of
      - is preferred name of timespan of
      - is preferred title of resource of
    - “has variant name”:
      - has variant name of agent
      - has variant name of entity
      - has variant name of place
      - has variant title of resource
      - has variant name of timespan
    - “Is variant name”:
      - is variant name of agent of

- is variant name of entity of
- is variant name of place of
- is variant title of resource of
- is variant name of timespan of

The possible merging of elements outlined above would avoid the question of whether unconstrained elements can and should indicate more specific relationships with common vocabulary and grammar even when those specifics are not supported by defined entity classes and formal constraints. Allowing preferred unconstrained element names which nevertheless informally reference entity types also has advantages. Such specified unconstrained elements would be more expressive than broadly generalized elements such as “has related entity.” This greater expressivity could have advantages for integrating unconstrained metadata with constrained metadata statements.

NARDAC encourages RSC to be clear about the intended uses of the unconstrained RDA element set. Even without formal RDA entity classes and domain and range constraints, expressive elements with more verbal specificity may be easier to integrate with both constrained RDA and with other predicate vocabularies and more appealing to some metadata communities. Metadata communities can limit the use of such specified unconstrained elements if supported by RDA more easily and efficiently than they can define them locally.

### Duplicate elements

Some elements should be removed because they are synonym to other existing elements:

- has date associated with agent = has related timespan of agent
- Is date associated with agent of = related timespan of agent

### Missing elements

- None found at this point.

### Unconstrained element labels

Several element labels can be shortened and made more “friendly” by removing words such as agent, entity, and resource. The “proposed labels” have been added in column H of the spreadsheet.

### Unconstrained element definitions

- We found several definitions that contain words suggesting “constraint.” These definitions are often not consistent with the definitions of the inverse elements.
  - We propose changing words such as “work,” “expression,” and “item” in definitions to “resource.” We have not found any definitions containing the word “manifestation.”
  - We propose changing words such as performer, illustrator, conductor, etc. to agent when the definition clearly indicates the role of the agent vis-à-vis the resource or other agent. This would bring more consistency in definitions. For instance, by changing “performer” to “agent” in the definition of “has instrumentalist,” the new definition becomes consistent to the definition of the inverse element “is instrumentalist,” in which the term used is “agent” and not “performer.”
- We propose changing other definitions to make them consistent with the definitions of similar elements. For instance, we propose making all definitions of “adapted as” elements consistent

by changing their definitions to include “based on a source resource” instead of current wordings. Ex.:

- is adapted as motion picture screenplay: Relates a resource to a resource that consists of a screenplay for a motion picture, based on a source resource.
- is adapted as choreography: Relates a resource to a choreographic resource based on a related source resource.
- We found a few definitions that contain obvious errors, such as gender that currently “relates a resource” instead of “an agent” “to a gender with which an agent identifies.”
- Some project participants suggested changing “a” to “that” in many definitions such as that of “is performer of”:  
“Relates an agent to a resource that includes a contribution by ~~an~~ that agent of performing music, acting, dancing, speaking, etc.”  
We find “that” a bit clearer than “a” in such definitions, but not so much that it warrants a large scale overhaul.
- In some cases, we proposed two possible definitions.
- Our proposed definitions appear in column I.

## User-friendly labels:

- Verbalized from:
  - Project participants discussed using verbalized versus non-verbalized form of element labels. We could not come to an agreement. Both types of labels have their pros and cons.
  - We decided to use the verbalized forms of labels throughout the document for the sake of consistency.
  - We note, however, that the verbalized forms could not be used in current MARC bibliographic records without some development (for example, it would necessitate the development of subfield i in 1XX fields).
- Some labels still contain unfriendly terms (e.g. nomen, amalgamation, aggregate). For example, we could not find a user-friendly label for “has aggregator.” For most users, an aggregator is a company that negotiate prices. We welcome suggestions to make such labels friendlier.
- Identical or similar words used in elements make it difficult to come up with clear, unambiguous labels, such as:
  - has absorbed agent
  - is absorbed by
  - is absorbed in part by
  - has absorbing agent
  - is absorption in part of
  - is absorption of
- Other similar sets for which it is difficult to come up with unambiguous labels are (note that the verb “has” was changed in some cases):
  - has founded agent of agent (is founding agent of)
  - has founder agent of resource of (is founder of)

- has founding agent of agent (has founding agent)
  - has founding agent of resource (has founder)
  - has sponsored resource of agent (has sponsored resource)
  - has sponsoring agent of agent (has sponsoring agent)
  - has sponsored agent of agent (has sponsored agent)
  - has sponsoring agent of resource (is sponsored resource of)
- We believe that it is fine to have duplicate labels If labels are used for display- purpose only. For instance, the following elements could have the same friendlier label “is part of”:
    - Is part of nomen
    - Is part of place
    - Is part of resource
    - Is part of timespan
  - Similarly, the following elements could have the same friendly label “has part”:
    - has part nomen
    - has part place
    - has part resource
    - has part timespan

## Location of friendly labels

The friendly labels could be located in:

- RDA Toolkit, Element Reference
- Resources section of the RDA Toolkit
- Separate spreadsheet

The main goal is to keep the unconstrained elements with the several labels linked to the constrained vocabulary. Having them all, including the friendly labels, in the Element Reference sounds like the way to do that.

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## 170: Points for discussion – Agent relationship elements and curator agent

Submitted by Thomas Brenndorfer – 2019-10-07

These points have been assembled as a result of NARDAC’s discussions of a proposal to add a “curator agent of work” agent relationship. Several issues were raised during the discussions, which resulted in NARDAC being unable to complete the processing and possible approval of this proposal for consideration by the RSC.

These points can assist in a general discussion of the processes in adding new RDA agent relationships.

**For reference:**

Current definition of “Work: **organizer agent**”: An agent who organizes a conference, exhibition, or other event that gives rise to a work.

Proposed definition of “curator agent of work” (or “exhibition curator agent” as another possible label): An agent who conceives, selects, and organizes a presentation of materials from a collection or displayed in an exhibition that gives rise to a work.

Current definition of “Item: **curator agent**”: An agent who conceives or manages the aggregation of an item in an exhibition or collection.

**Point 1.** There was a push in the proposal to use language about “shortcuts” in the agent relationship.

A proposal to add a “curator” agent relationship at the work level was presented as a “shortcut” relationship. A “curator” is responsible for an event, and the event is what the work (an exhibition catalog) is about.

NARDAC also looked at a concern that was raised about “curator agent of item”, in that this item-level relationship could also be considered a shortcut. The issue raised was that the shortcut should embody a relationship to the collection or exhibition event that would provide additional context when relating the agent to the item.

NARDAC was very skeptical that these shortcut approaches were valid, as the event is an unidentified non-RDA entity.

**Discussion:** Has opening the door to shortcut relationships created an incentive for proposals for more shortcut relationships? Should future proposals avoid using definitions that hinge on “shortcut” relationships involving other entities, whether RDA entities or non-RDA entities?

**Point 2.** The initial proposal for “curator agent of work” involved a reluctance to use the existing “organizer agent” element because it was deemed to be a corporate body relationship only, and a relationship only about logistics at that. As a result, “organizer agent” was considered to be quite different from the proposed “curator agent of work”. It was presented that not all curators are organizers, as curators have specific job descriptions that went further than what was deemed to be limited in the label “organizer agent.”

Numerous problems were identified by NARDAC with this understanding. “Organizer agent” has a range of Agent, which is more than just Corporate Body. In addition, the examples presented of the curators involved led back to articles and press stories that described their roles as “co-organizers” of the exhibition. In addition, the identified curators were employees of the so-called organizer corporate bodies of the art exhibitions. There was a lot of evidence that indicated that curators of an exhibition were also called “organizers” and so could fit under the broader relationship element.

As a result, there was some general support on NARDAC for adding “exhibition curator agent” as a narrower element under “organizer agent”.

The NARDAC discussion included a concern that proposing an element with a label based on the job title (“curator”) was being presented as more important than relying on the definitions of the relationships.

**Discussion:** How much should different job titles as they appear on a resource weigh in on proposing new agent relationships? Does a more specific job title warrant a new relationship designator for each case? NARDAC felt it was justified to add “exhibition curator agent” as a subtype of “organizer agent”, but are there appropriate guidelines for adding agent relationships that could be developed to cover similar cases in the future?

**Point 3.** There was confusion as to whether “organizer agent” is only under the broader “related agent of work” or also under the narrower “creator agent of work”. Formerly, this was the distinction between “Creator” and “Other Agent Associated With the Work.”

“Organizer agent” appears, in one case, under “Creator agent of work” in the beta Toolkit. But the discussions so far included an assumption that both “organizer agent” and a proposed “exhibition curator agent” are not creators of the work, but related agents whose roles brought about the conditions that resulted in the work. These agents are not creators of a work in the sense of authors or artists.

**Discussion:** What are the appropriate agent relationships that fit under “Related agent of work” but not under “Creator agent of work”?

**Point 4.** Differentiation of the “curator agent of work” (or “exhibition curator agent”) relationship from the Item-level relationship, “Curator agent”.

A separate consideration of this element is pending the completion of the review of the proposed “curator agent of work” (or “exhibition curator agent”).  
Heads up only on further proposals that may be coming about this element.

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## 173: Fast Track Proposal 01

### Corporate Body: preferred name of corporate body > Names of corporate body in more than one language

#### Introductory text from Basecamp:

The notion of “official language” in the current Toolkit at 11.2.2.5.2 has several times been “translated” in the Beta Toolkit as a “value of Corporate Body: language of corporate body” in the instructions for Corporate Body: preferred name of corporate body > Names of corporate body in more than one language ([https://beta.rdatoolkit.org/en-US\\_ala-652f1f83-0f9d-3cf9-934d-e5ffbad846c8/p\\_mbz\\_vlz\\_xfb](https://beta.rdatoolkit.org/en-US_ala-652f1f83-0f9d-3cf9-934d-e5ffbad846c8/p_mbz_vlz_xfb)). However, Corporate Body: language of corporate body is defined as “A language used by a corporate body in its communications.” Nothing in the definition indicates that the element is restricted to official languages. Not all languages used by a corporate body are official languages. For example, the Canadian government has two official languages, English and French. It does not mean that it cannot produce documents in other languages for specific purposes or audiences. All the languages used by the Canadian government could be recorded as Corporate Body: language of corporate body but only English and French are official languages.

I believe that using Corporate Body: language of corporate body as an equivalent of “official language” would not produce the same results as in the current Toolkit when the intention of an instruction was to prefer a form in an official language of the body. For example, let’s say that the Canadian government produces a document in Chinese and uses a Chinese translation of a Department name in it. The condition/option in the Beta Toolkit at row 3 in the attached would allow a library that applies this instruction and catalogues in Chinese to use the Chinese form of the Department’s name as a preferred name for the Department because Chinese is one of the languages used by the Canadian government. The current Toolkit does not allow it because Chinese is not an official language of the Canadian government.

In the attached document, I have put the current Toolkit and Beta Toolkit instructions side by side in a table for easy comparison. The “Comment” column includes my suggestions of revisions.

If the suggested revisions are accepted, it might also be necessary to examine whether the “in case of doubt” instruction in the current Toolkit (see row 6 in the attached document) needs to be added as an option under other conditions. The location of the instruction in the current Toolkit implies that it applies to all the preceding instructions, presumably because the official status of a language might in some cases be difficult or impossible to ascertain. Restoring the notion of “official language” might require adding the “in case of doubt” option to other conditions than those where it currently appears.

## Corporate Body: preferred name of corporate body > Names of corporate body in more than one language

	Current Toolkit (11.2.2.5.2)	Beta Toolkit	Comment
1	If a corporate body's name has appeared in different languages, choose as a preferred name the form in the official language of the body.	<p>CONDITION</p> <p>A value of a name appears in more than one language in manifestations.</p> <p>A corporate body has only one value of Corporate Body: language of corporate body.</p> <p>OPTION</p> <p>Record a value in an official language of a corporate body.</p>	<p>The second condition should read:</p> <p>A corporate body has only one <del>value of Corporate Body:</del> <u>language of corporate body official language.</u></p>
2	<i>Alternative</i> Choose a form in a language preferred by the agency creating the data.	<p>OPTION</p> <p>Record a value that appears most frequently in reference sources in a language that is preferred by an agent who creates the metadata.</p>	
3	If there is more than one official language and one of these is a language preferred by the agency creating the data, choose that form as a preferred name.	<p>CONDITION</p> <p>A value of a name appears in more than one language in manifestations.</p> <p>A corporate body has more than one value of Corporate Body: language of corporate body.</p> <p>A value of Corporate Body: language of corporate body is a language preferred by an agent who creates the metadata.</p> <p>OPTION</p> <p>Record a value that is in a language that is preferred by an agent who creates the metadata.</p>	<p>The second and third conditions should read:</p> <p>A corporate body has more than one <del>value of Corporate Body:</del> <u>language of corporate body official language.</u></p> <p><del>A value of Corporate Body: language of An official language of the corporate body is not a language preferred by an agent who creates the metadata.</del></p> <p>The option should read:</p> <p>Record a value that is in <u>an official language that is preferred by an agent who creates the metadata.</u></p>

<p>4</p>	<p><i>(Because the second condition in this instruction has two options, it has two sets of equivalent condition/option in the Beta Toolkit and is therefore repeated at row 5.)</i></p> <p><i>If:</i>              the body has more than one official language  <i>and</i>              a language preferred by the agency creating the data is not one of the official languages of the body, or, the official language of the body is not known  <i>then:</i>              choose as a preferred name the form of name in the language used predominantly in resources associated with the body.</p>	<p><i>(Incorporates only the first option of the second condition in the current Toolkit. It also incorporates the “In case of doubt” instruction at row 6.)</i></p> <p>CONDITION              A value of a name appears in more than one language in manifestations.</p> <p>A corporate body has more than one value of Corporate Body: language of corporate body.</p> <p>A value of Corporate Body: language of corporate body is not a language preferred by an agent who creates the metadata.</p> <p>OPTION              Record a value that is in a language that appears most frequently in manifestations.</p> <p>In case of doubt, record a value that is presented first in the first manifestation received by an agent who creates the metadata.</p>	<p>The second and third conditions should read:</p> <p><del>A corporate body has more than one value of Corporate Body: language of corporate body official language.</del></p> <p><del>A value of Corporate Body: language of An official language of the corporate body is not a language preferred by an agent who creates the metadata.</del></p>
<p>5</p>	<p><i>(Same instructions as in 4 above.)</i></p> <p><i>If:</i>              the body has more than one official language  <i>and</i>              a language preferred by the agency creating the data is not one of the official languages of the body, or, the official language of the body is not known  <i>then:</i>              choose as a preferred name the form of name in the language used predominantly in</p>	<p><i>(Incorporates only the second option of the second condition in the current Toolkit. It also incorporates the “In case of doubt” instruction at row 6.)</i></p> <p>CONDITION              A value of a name appears in more than one language in manifestations.</p> <p>A corporate body has more than one value of Corporate Body: language of corporate body.</p>	<p>The second condition should be deleted:</p> <p><del>A corporate body has more than one value of Corporate Body: language of corporate body.</del></p> <p>The third condition should read:</p> <p><del>A value of Corporate Body: language of An official language of the corporate body is not known.</del></p>

	resources associated with the body.	<p>A value of Corporate Body: language of corporate body is not known.</p> <p>OPTION Record a value that is in a language that appears most frequently in manifestations.</p> <p>OPTION In case of doubt, record a value that is presented first in the first manifestation received by an agent who creates the metadata.</p>	
6	In case of doubt, choose the form that is presented first in the first manifestation received.		

## 173: Glennan analysis of Language of Corporate Body

### Language of Corporate Body

Kathy Glennan | October 14, 2019



## **173: Fast Track Proposal 02 [61 p. of marked up and clean RDA text omitted here]**

Corporate Body: authorized access point for corporate body

### **Introductory text from Basecamp:**

This proposal (see attachment) concerns the sections of the chapter for Corporate Body: authorized access point for corporate body that go from “Legislative bodies” to “Emissaries of a pope”. It describes three issues and contains three recommendations:

Recommendation #1: Delete the condition “A corporate body is a subdivision of the Catholic Church.”

Recommendation #2: Review conditions and options to remove the term *subdivision* from the conditions and add more specific wording in the options when needed.

Recommendation #3: Replace indefinite articles with definite articles in the options when the context warrants it.

## **Corporate Body: authorized access point for corporate body**

### **Description of issues**

This proposal concerns the sections of the chapter for Corporate Body: authorized access point for corporate body that go from “Legislative bodies” to “Emissaries of a pope”. It addresses three issues.

1) There are several conditions which have the wording “A corporate body is a subdivision of the Catholic Church.” For example:

#### CONDITION

A corporate body is a Catholic patriarchate, diocese, province, etc.

A corporate body is a subdivision of the Catholic Church.

#### CONDITION

A corporate body is a congregation, tribunal, or other administrative organ of the Catholic Church and is part of the Roman Curia.

A corporate body is a subdivision of the Catholic Church.

CONDITION

A corporate body is a diplomatic mission from a pope to a secular power.

A corporate body is a subdivision of the Catholic Church.

CONDITION

A corporate body is a nondiplomatic apostolic delegation from a pope to a country.

A corporate body is a subdivision of the Catholic Church.

CONDITION

A corporate body is an emissary of a pope who is acting in an official capacity other than a nuncio, internuncio, or apostolic delegate.

A corporate body is a subdivision of the Catholic Church.

CONDITION

A corporate body is an emissary of a pope who is acting in an official capacity other than a nuncio, internuncio, or apostolic delegate.

A corporate body is a subdivision of the Catholic Church.

A country, region, or other place in which an emissary functions cannot be ascertained,. [The comma preceding the period should be deleted.]

I'm puzzled by the fact that the sentence was added as a condition. It feels redundant because the first condition already implies that the body is a subdivision of the Catholic Church. It is also, as a consequence, confusing because it makes one wonder if, for example, there are Catholic patriarchates, congregations, etc. that would not be part of the Catholic Church. Because there aren't, the condition is irrelevant and therefore complicates the thought process for no reason.

True, the equivalent instructions in the current Toolkit contain wording like “Record the name of a ... as a subdivision of the Catholic Church.” For example, 11.2.2.27 states: *Record the name of a province, diocese, synod, or other subordinate unit of a religious body with jurisdiction over a geographic area as a subdivision of the religious body.* This sentence is completed by the one which follows it immediately and which explains how recording the name as a subdivision must be accomplished: *Record the name in the form of a subdivision of the authorized access point representing the religious body.* Both sentences constitute in fact a single instruction that was divided into two parts for better readability during the rewording of RDA, as shows the original wording of the instruction in the April 2012 version of RDA (11.2.2.30.1): *Record the name of a province, diocese, synod, or other subordinate unit of a religious body having jurisdiction over a geographic area as a subdivision of the authorized access point representing the religious body.* It is also useful to keep in mind that *subdivision* is used here as a synonym of *subheading*, which was the term originally used in AACR2.

I think it is therefore a mistake to convert the first sentence as a separate condition. It should in fact be part of the option since it states how the name should be recorded (as opposed to stating the category of corporate body covered by the instruction and any specific conditions). However, since the explanatory wording has already been converted into an option which gives all the information needed to construct the access point, the first sentence (“Record the name of a ... as a subdivision of the Catholic Church.”) is superfluous in the beta Toolkit and the phrase “A corporate body is subdivision of the Catholic Church.” could be deleted.

Recommendation #1: Delete the condition “A corporate body is a subdivision of the Catholic Church.”

2) I found that the usage of the word “subdivision” was also problematic in other instructions. Let’s take the instruction about legislatures as an example:

CONDITION

A corporate body is a legislature who is a subdivision of a jurisdiction for which it legislates.

OPTION

Record a value that includes, in this order:

a value of Corporate Body: authorized access point for corporate body for a jurisdiction

a value that is based on Corporate Body: preferred name of corporate body of a legislature.

The condition has the wording “who is a subdivision of a jurisdiction for which it legislates” which reflects the following wording from the current Toolkit: *Record the name of a legislature as a subdivision of the jurisdiction for which it legislates.* The sentence explains how to the name of the legislature should be constructed (i.e. as a subdivision or subheading of the name for the jurisdiction) and not what type of legislature is covered by the instruction.

For the reasons given in section 1), I think that this wording should not be part of the condition, which should only state: *A corporate body is a legislature.* The fact that the name of a legislature must be

recorded as a subdivision of the jurisdiction is already stated (albeit differently) in the option. On the other hand, the wording of the option should be made more specific if the condition is reworded:

a value of Corporate Body: authorized access point for corporate body for a the jurisdiction for which the legislature legislates

a value that is based on Corporate Body: preferred name of corporate body of a the legislature.

Recommendation #2: Review conditions and options to remove the term *subdivision* from the conditions and add more specific wording in the options when needed.

3) This instruction also illustrates what seems to me as a confusing use of indefinite articles. I appreciate the use of indefinite articles in the condition but using them in the option when the noun they precede has already been mentioned in the option makes the instruction ambiguous and difficult to understand. For example, saying “a value of Corporate Body: authorized access point for corporate body for a jurisdiction” elicits the question “Which jurisdiction?”. However, saying “a value of Corporate Body: authorized access point for corporate body for the jurisdiction” automatically clarifies that it is the jurisdiction mentioned in the condition.

Recommendation #3: Replace indefinite articles with definite articles in the options when the context warrants it.

I reviewed the authorized access point for corporate body instructions in the rest of this document and noted where I felt that the condition/option and the articles were problematic. I believe that the changes I suggest would make the instructions easier to understand and to apply.

Note: For brevity, only the sections of the chapter for Corporate Body: authorized access point for corporate body affected by the proposal have been included in this document, namely:

- Legislative bodies
  - Legislatures
    - Legislatures with more than one chamber
  - Legislative committees and subordinate units
- Constitutional conventions
- Courts of a jurisdiction and ad hoc military courts
  - Civil and criminal courts
  - Ad hoc military courts

- Armed forces
  - Armed forces at the national level
  - Armed forces below the national level
- Embassies, consulates, etc.
- Delegations to international and intergovernmental bodies
- Councils, etc., of a single religious body
- Councils, etc., of a particular district of a single religious body
- Religious officials
  - Bishops, rabbis, mullahs, patriarchs, etc.
  - Popes
- Religious provinces, dioceses, synods, etc.
- Central administrative organs of the Catholic Church (Roman Curia)
- Papal diplomatic missions
- Nondiplomatic apostolic delegations
- Emissaries of a pope

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## **178: Draft Terms of Reference for the RSC Translations Working Group**

**To:** RDA Steering Committee  
**From:** Kathy Glennan, RSC Chair  
**Subject:** Terms of reference for the RSC Translations Working Group

### **Background**

The RSC develops *RDA: Resource Description and Access* for international use with the range of encoding schemes typically employed in library and related applications. RDA uses value vocabularies to support resource discovery and is intended to cover all types of content and media. The RDA guidelines and instructions are published in RDA Toolkit.

The original language of RDA is English. The whole text of the original RDA has been translated into several languages, and work has started to translate the text in the beta RDA Toolkit.

Complete translations are often incorporated into RDA Toolkit to provide a choice of languages for users. Sometimes a full translation is not distributed in RDA Toolkit because other distribution methods are used.

Partial translations of RDA are also made. They are confined to translations of RDA Reference (i.e., the Glossary, or a subset of it). Partial translations are not added to RDA Toolkit.

The RDA Registry contains linked open data representations of the RDA vocabularies. It is being developed to accommodate translations of RDA Reference: the RDA labels, descriptions, and scope notes of RDA elements and value vocabularies. The RSC and RDA Development Team wish to include as many translations as possible in the RDA Registry, whether they come from whole or partial translations of RDA.

### **General terms of reference**

The RSC Translations Working Group will conduct its business within the general terms of reference for RSC Working Groups (see RSC/Operations/3).

### **Charge (duties and responsibilities)**

The Group is charged to:

- Provide expertise and to assist with the development of RDA and its translations

For details, see RSC Translations Working Group: 2020 membership and tasks

### **Related document**

Policy for New Translations of RDA

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## **178: Draft RSC Translations Working Group: 2020 membership and tasks**

**To:** RDA Steering Committee

**From:** Kathy Glennan, RSC Chair

**Subject:** RSC Translations Working Group: 2020 membership and tasks

## Chair

- Daniel Paradis (Bibliothèque et Archives nationales du Québec)

## Membership

- Arabic translation: Rania Osman
- Catalan translation: Ida Conesa Sanz
- Finnish translation: Marja-Liisa Seppälä
- French translation: Daniel Paradis
- German translation: Cinzia Bufalino
- Hungarian translation: Dancs Szabolcs
- Italian translation: Carlo Bianchini
- Norwegian translation: Frank Haugen
- Spanish translation: Octavio Rojas
- Partial translations: Anders Cato
- James Hennelly (Director, ALA Digital Reference)
  
- Linda Barnhart (RSC Secretary, ex officio)
- Gordon Dunsire (Technical Team Liaison Officer, ex officio)
- Kathy Glennan (RSC Chair, ex officio)
- Honor Moody (RDA Examples Editor, ex officio)

## Tasks

1. Prepare guidelines for the translation of RDA Reference and of the RDA Toolkit.
2. Assist with developing more efficient translation workflow processes, using Trados and other tools as needed.
3. Produce recommendations for developing and refining processes for the translation of RDA.
4. Test the functionality of the RDA Registry for managing multi-lingual vocabularies.
5. Identify areas in which the presentation of translations in the beta Toolkit can be improved, as well as areas for improvement in the authoring tools and production process.
6. Advise the RSC on issues involving translations of *RDA*.

7. Identify areas of the RDA English text which can be developed to improve clarity for international users.
8. Identify sources of new partial or complete RDA translations.
9. Liaise with the RDA Development Team on translations.
10. Explore the possibility of reviewing the translations of IFLA standards such as IFLA-LRM and Multilingual Dictionary of Cataloguing (MulDiCat) for harmony with corresponding RDA translations
11. Explore developing a policy/process for including RDA terminology (e.g., neologisms) in translations of IFLA standards.

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## **181: Work boundaries**

Gordon Dunsire, RSC Technical Team Liaison Officer, 4 October 2019

### **Abstract**

This discussion paper provides a description of the issues in determining the circumstances when a new work should be described. This information does not have a focus in the beta Toolkit and may require further clarification.

The paper is intended to support a general discussion on this topic and does not make any recommendations.

### **Background**

The Guidance chapter on Diachronic works in the beta Toolkit includes guidance on the transformation boundaries of diachronic works.

The guidance includes transformations from diachronic works to static works and vice-versa. Toolkit feedback suggests that users expect to find this information in association with statics works as well as under the topic of diachronic works, and that providing guidance on transformation boundaries of static works or works in general would be useful.

### **Library Reference Model**

The scope note for the Work entity in the Library Reference Model (LRM) says:

“A work is perceived through the identification of the commonality of content between and among various expressions ... similarity of factual or thematic content alone is not enough to group several expressions as realizing the same instance of work ... distinct *works* if independent intellectual or artistic effort was involved in their creation ... A *work* comes into existence simultaneously with the creation of its first *expression* ... A *work* can be recognized retrospectively from an examination of the individual realizations or *expressions* of the *work*. The *work* consists of the intellectual or artistic creation that lies behind all the various *expressions* of the *work*. As a result, the content identified with an instance of *work* can evolve as new *expressions* of it are created.

Bibliographic and cultural conventions play a crucial role in determining the exact boundaries between similar instances of *works*. User needs are the basis for determining whether instances of *expression* are considered to belong to the same instance of *work*. When the majority of users, for most general purposes, would regard the *expression* instances as being intellectually equivalent, then these *expressions* are considered to be *expressions* of the same *work*.

Generally, when a significant degree of independent intellectual or artistic effort is involved in the production of an *expression*, the result is viewed as a new *work* with a derivation relationship to the source *work*. Thus paraphrases, rewritings, adaptations for children, parodies, musical variations on a theme and free transcriptions of a musical composition are usually considered to represent new *works*. Similarly, adaptations of a *work* from one literary or art form to another (e.g., dramatizations, adaptations from one medium of the graphic arts to another, etc.) are considered to represent new *works*. Abstracts, digests and summaries are also considered to represent new *works*.”

The LRM introduces a high-level relationship between two Works: LRM-R22 (is a transformation of/was transformed into). The definition and scope note are:

“This relationship indicates that a new work was created by changing the scope or editorial policy (as in a serial or aggregating work), the genre or literary form (dramatization, novelization), target audience (adaptation for children), or style (paraphrase, imitation, parody) of a previous work

Some transformations may be considered as being only inspired by a previous work.”

This relationship is directly implemented in RDA as **Work: transformation** (and **Work: transformation of**). The definition is the basis of element sub-types for:

- **Work: transformation by audience**
- **Work: transformation by genre**
- **Work: transformation by policy**
- **Work: transformation by style**

Existing RDA relationship elements are implemented as sub-types of these transformation elements.

For example:

**Work: related work of work**  
> **Work: transformation by genre of**  
>> **Work: based on work**  
>>> **Work: adaptation of work**  
>>>> **Work: dramatization of work**

The LRM does not include a transformation relationship between two expressions because the concept of transformation is implicit between two expressions of the same work.

The existing RDA Expression relationship elements that correspond to the Work elements have the same hierarchy but with no transformation level:

**Expression: related expression of expression**  
> **Expression: based on expression**  
>> **Expression: adaptation of expression**  
>>> **Expression: dramatization of expression**

The RDA expression relationships are used to relate two expressions of the same work, when the agent who creates the metadata judges that there is insufficient difference between the expressions to require a description of a new distinct work.

## Boundaries

A “work boundary” or “transformation boundary” is the set of criteria applied by an agent who creates the metadata to determine if a description of a new Work is required.

The criteria are applied to an expression that is being described. The expression is compared with other expressions to determine the nature of the differences with the expression being described. If the differences meet the criteria, the judgement is that the expression realizes a new work; if the differences do not meet the criteria, the judgement is that the expression realizes the same work as the comparison expressions.

The criteria are specific to an application and are created according to “bibliographic and cultural conventions”. The Toolkit cannot provide instructions on what criteria to use, but does provide guidance to support the judgement process and the elements to implement it.

The transformation relationships for works are transitive: “Work A is transformed into Work B is transformed into Work C” and “Work A is transformed into Work C” are both valid. A decision to record Work B does not conflict with a decision to not record Work B.

The use of expressions to determine a work boundary is reflected in the “lock” or cardinality restriction between the Work and Expression entities in the LRM: an expression realizes one and only one work.

A work boundary includes RDA Expression elements and the degree of change in their values. Guidance and optional instructions for elements used in a work boundary are given in the guidance chapters Describing a work.

There are additional cardinality restrictions for specific kinds of work.

A diachronic work **as a whole** is realized by one and only expression that is embodied in one and only one manifestation.

A diachronic work boundary includes RDA Manifestation elements and the degree of change in their values.

Two diachronic expressions necessarily indicate distinct diachronic works.

Two diachronic manifestations necessarily indicate distinct diachronic works.

This information is given in the guidance chapter on Diachronic works.

The characteristics of an aggregating expression are dependent on the characteristics of the expressions that are aggregated. Changing any of the expressions that are aggregated results in a new aggregating expression, and therefore a new aggregating work; an aggregating work is realized by one and only one aggregating expression.

This information is given in the guidance chapter on Aggregates.

The boundaries of the part works of a whole-part work have a one-to-one relationship with the boundaries of the corresponding part expressions. Note that an aggregate may appear to re-partition part expressions, for example by embodying only the second and third parts of a trilogy as a contiguous expression, but that does not affect the whole-part boundaries.

## Representative expressions

A representative expression can be used to determine the baseline of a work boundary.

An aggregating expression and a diachronic expression are de facto the representative expression of a work because only one expression can realize the work.

A representative expression of a static work may be used as the comparator for every 'new' expression encountered by the agent who creates the metadata, rather than, say, looking for a recent expression to compare with.

This may be used to resolve judgment on cases where the boundary is crossed as a result of accumulation of small changes that do not meet the boundary conditions.

There is no specific reference to this in the RDA guidance chapter on Representative expressions.

## Work groups

The use of a common appellation to collocate works with common characteristics as a "work group" is a powerful device for harmonizing the results of applying different work boundaries by different agents who create the metadata.

It was evolved during the 3R Project to support the description of diachronic works that have distinct descriptions as a result of the "WEM-lock", but a "work group" echoes concepts such as "super-work" that have emerged in other bibliographic standards.

The guidance and instructions about work groups in the beta Toolkit is "vanilla". The primary use case that has been considered is the use of ISSN-L as a **Work: identifier for work group**.

## Impact

The modular structure of the beta Toolkit provides flexibility in how guidance is organized and presented.

The main factors to be considered in discussing these issues are the development of additional content. Existing content can be readily moved within the Toolkit structure.

## Questions for discussion

In no particular order.

***Question 1: Should integrated guidance be provided in the Toolkit for determining work boundaries, etc.?***

***Question 2: Should additional guidance be provided for static works and their expressions?***

***Question 3: Should guidance be provided on the use of representative expressions to apply work boundaries?***

***Question 4: Should additional guidance be provided for the use of work groups?***

***Question 5: How do work boundaries fit into the development of use of application profiles?***

**Question 6: What other aspects of work boundaries, etc. should be incorporated in the beta Toolkit?**

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## 182: RDA Metadata Implementation Scenarios

Gordon Dunsire, RSC Technical Team Liaison Officer, 4 October 2019

### Abstract

This paper discusses enhancements to the original RDA database implementation scenarios that reflect the structure and content of the new Toolkit, makes recommendations on updating the scenarios, and proposes a draft text and layout for incorporating the revised scenarios in the new Toolkit.

### Background

The original RDA Toolkit is associated with a set of database implementation scenarios.<sup>1</sup> The last revision was in 2009.

The Library of Congress response to the beta Toolkit recommended that implementation scenarios be incorporated in the new Toolkit.

### Original scenarios

There are three database implementation scenarios associated with the original Toolkit:

- Scenario 1: Relational / object-oriented database structure
- Scenario 2: Linked bibliographic and authority records
- Scenario 3: 'Flat file' database structure (no links)

The document gives a brief overview and description of the scenarios, followed by a data structure diagram for each scenario.

Some of the content is inconsistent with the new Toolkit:

- References to FRBR and FRAD.
- Use of the term 'record'.
- Out-of-date labels for specific elements.

**Recommendation 1: Update the content of the implementation scenarios to be consistent with the new Toolkit.**

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<sup>1</sup> RDA Database Implementation Scenarios. Available at: <http://www.rda-jsc.org/archivedsite/docs/5editor2rev.pdf>

## Enhancements

The bases of the original scenarios are still valid, although some detail needs to be updated.

**Recommendation 2: Retain the original scenarios.**

### Scenario for linked open data

There is no scenario for implementing RDA metadata as linked open data for use in Semantic Web applications.

The IFLA Library Reference Model “is developed very much with semantic web technologies in mind, and it is hoped that in the future, an update of this document will provide RDF examples as well.”<sup>2</sup>

The new Toolkit introduces the IRI recording method to support linked open data and Semantic Web applications.

**Recommendation 3: Add a scenario for linked open data.**

### Scenarios and recording methods

There is an alignment between the four recording methods and four implementation scenarios.

The alignment is fuzzy, and is indicated by the kind of value used to link distinct datasets within the scenario. Many local applications will be a hybrid of two or more scenarios, with a mix of linking methods.

Dataset link	Recording method	Scenario	Example
name/title of entity	Unstructured description	Flat file	Printed bibliography
access point for entity	Structured description	Bibliographic/Authority	MARC 21 catalogue
Identifier for entity	Identifier	Relational/Object-oriented	MS Access database
IRI of entity	IRI	Linked open data	RDF graph

The alignment exposes the fundamental difference between ‘string’ and ‘thing’ scenarios, and the relative differences in degree of human and automated intermediation associated with the original ‘string’ scenarios.

The original flat file scenario uses access points as headings for the unlinked datasets for bibliographic and non-bibliographic entities, but this can be “dumbed-down” to preferred names or titles without loss of functionality.

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<sup>2</sup> IFLA Library Reference Model. 4.2.4. Available at: [https://www.ifla.org/files/assets/cataloguing/frbr-lrm/ifla-lrm-august-2017\\_rev201712.pdf](https://www.ifla.org/files/assets/cataloguing/frbr-lrm/ifla-lrm-august-2017_rev201712.pdf)

The original relational/object-oriented scenario shows preferred and variant names and titles associated with entity datasets, but the actual linking method is primary and secondary keys (table/row number) or object identifier.

**Recommendation 4: Clarify the alignment between scenarios, dataset linking methods, and recording methods.**

**Recommendation 5: Notate the scenarios as A, B, C, and D to avoid confusion with the original 1, 2, and 3:**

Scenario A: Linked open data

Scenario B: Relational or object-oriented data

Scenario C: Bibliographic/authority data

Scenario D: Flat file data

## Scenarios and application profiles

An application profile is a specification of one or more metadata description sets based on one or more entities. A profile determines several of the characteristics associated with implementation scenarios:

- The entities to be described.
- The elements to use in a description of an entity.
- The preferred recording method to use for an element.

For example, Scenario A (Linked open data) selects all entities, does not require any appellation elements for non-WEMI entities, and prefers the IRI recording method for all elements where applicable.

A scenario also determines the clustering of resource entities (WEMI) in basic metadata description sets. For example, Scenario C (Bibliographic/authority) treats WEM, with or without I, as a single description set.

In turn, a scenario may determine the selection of elements required for a Minimum description of a resource entity ([https://beta.rdatoolkit.org/en-US\\_ala-f4fb013b-b64e-37b1-902c-561d27b1e832](https://beta.rdatoolkit.org/en-US_ala-f4fb013b-b64e-37b1-902c-561d27b1e832)). For example, Scenario C (Bibliographic/authority) can use internal or latent identifiers as appellation elements for resource entities, and prefer the shortcut elements “work manifested”/”manifestation of work” to avoid describing an expression.

Basic application profile characteristics of the implementation scenarios are given in Table 1:

*Table 1: Application profile characteristics of implementation scenarios*

Characteristic / Scenario	A	B	C	D
<b>Related entity value</b>				
name/title				Y
access point			Y	Y
identifier		Y	Y	

IRI	Y			
<i>Resource entities</i>				
WEMI cluster			Y	Y
WEMI separate	Y	Y		

Information on implementation scenarios is best presented in the Toolkit in conjunction with string encoding schemes and other resources for application profiles.

***Recommendation 6: Add updated content on implementation scenarios to RDA Toolkit to complement Toolkit resources for application profiles.***

## Recommendations

***Recommendation 1: Update the content of the implementation scenarios to be consistent with the new Toolkit.***

***Recommendation 2: Retain the original scenarios.***

***Recommendation 3: Add a scenario for linked open data.***

***Recommendation 4: Clarify the alignment between scenarios, dataset linking methods, and recording methods.***

***Recommendation 5: Notate the scenarios as A, B, C, and D to avoid confusion with the original 1, 2, and 3.***

***Recommendation 6: Add updated content on implementation scenarios to RDA Toolkit to complement Toolkit resources for application profiles.***

## Draft text

### RDA implementation scenarios

RDA data are metadata created using RDA instructions and recorded with RDA entities and elements. All RDA data consist of one or more metadata statements recorded as metadata description sets. A metadata statement has an implicit three-part subject-predicate-object structure: the subject of the statement is the entity being described; the predicate of the statement is the characteristic (attribute or relationship) being recorded; the object of the statement is the value of the characteristic, using any applicable recording method.

The RDA entities and elements are conformant with the IFLA Library Reference Model, and constitute a comprehensive implementation of the model.

The RDA entities, elements, and controlled terminologies are published in the RDA Registry in Resource Description Framework. This provides a consistent and coherent machine-readable ontology for

Semantic Web applications, and ensures that descriptions of fine granularity entities using fine granularity elements can be automatically re-used in broader applications. For example, any description of a Person entity is also a description of an Agent entity.

The utility of recording methods in automated applications of RDA data is clarified and extended to all RDA elements where applicable. The alignment of appellation elements (name/title, access point, identifier) with recording methods (unstructured description, structured description, identifier) allows RDA data to accommodate a wide range of implementation factors such as the efficiency of data creation and maintenance, the interoperability of data with other RDA and non-RDA data, and the ease and effectiveness with which users are able to apply the functional objectives that RDA is designed to fulfil.

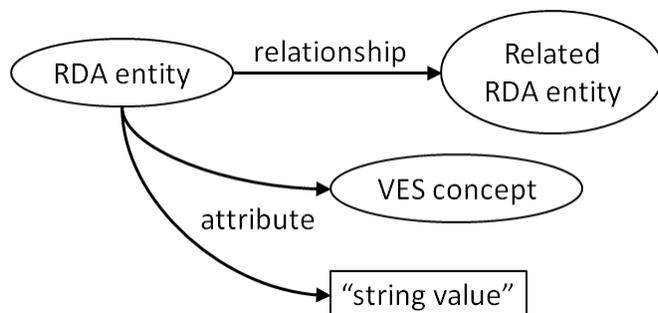
For example, automated transcription of an unstructured description is a very efficient method of creating data, but the resulting string is only effective for keyword searching. As another example, the use of separate descriptions for works and expressions in a relational or object-oriented database structure ensures access not only to all works and expressions associated with a particular person, etc., but to all related works (adaptations, etc.) as well, regardless of whether the name of that person is used to construct the authorized access points representing those works or not.

There are many database structures that are suitable for storing and supplying RDA data. The scenarios described below illustrate the range of potential configurations of RDA data and reflect the distinct structures that are commonly used for library and cultural heritage metadata.

The RDA ontology and guidance on recording methods allows RDA data to be moved or shared between implementation scenarios with a defined level of interoperability. In general, data for any scenario can be re-used, with loss of detail, in a scenario later in the enumerated sequence. For example, Scenario A (Linked open data) can be 'collapsed' into a Scenario D (Flat file data) implementation, and Scenario B (Relation and object-oriented data) can be coarsened into Scenario C (Bibliographic/authority data).

## Scenario A: Linked open data

### Diagram



### Characteristics

Metadata description sets are expressed in Resource Description Framework (RDF) using IRIs taken from the RDA Registry.

Descriptions of the resource entities that comprise a single information resource are recorded in a separate metadata description set for each entity.

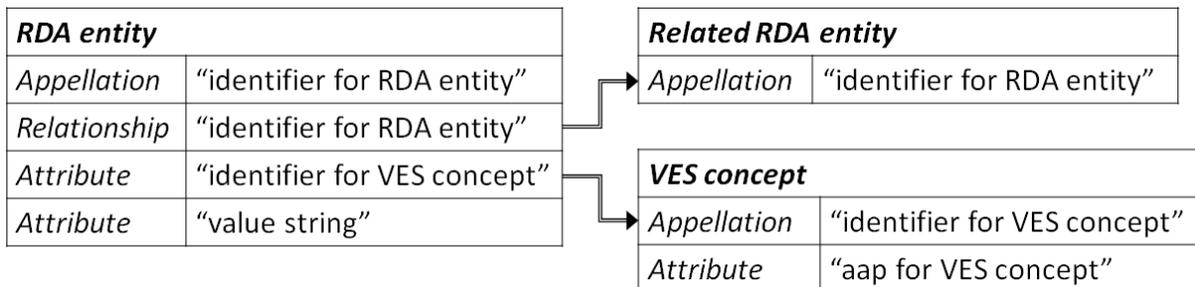
Descriptions of other entities that are associated with an information resource are recorded in a separate metadata description set for each entity.

The IRI recording method is preferred for values taken from a vocabulary encoding scheme.

A metadata description set for an entity is linked to a metadata description set of a related entity using an IRI of the related entity.

### Scenario B: Relational or object-oriented data

#### Diagram



### Characteristics

Metadata description sets are expressed in a set of structured data tables and columns that correspond directly to entities and elements taken from the RDA Registry.

Descriptions of the resource elements that comprise a single information resource are recorded in a separate metadata description set for each entity.

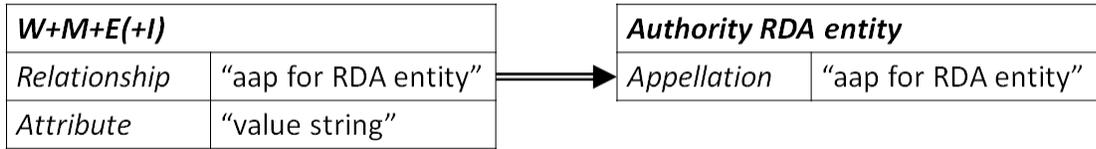
Descriptions of other entities that are associated with an information resource are recorded in a separate metadata description set for each entity.

The identifier recording method is preferred for values taken from a vocabulary encoding scheme.

A metadata description set for an entity is linked to a metadata description set of a related entity using an identifier for the related entity based on primary keys taken from a relational or object-oriented database.

## Scenario C: Bibliographic/authority data

### Diagram



### Characteristics

Metadata description sets are expressed in an encoding schema that aligns with entities and elements taken from the RDA Registry.

Descriptions of the resource elements that comprise a single information resource are recorded in a single integrated metadata description set. The component resource entities are not explicitly identified.

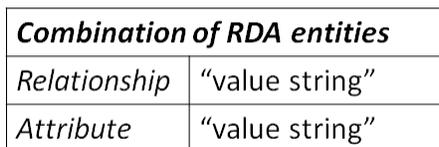
Descriptions of other entities that are associated with an information resource are recorded in a separate metadata description set for each entity.

The structured description recording method is preferred for values taken from a vocabulary encoding scheme.

A metadata description set for an entity is linked to a metadata description set of a related entity using an access point for the related entity.

## Scenario D: Flat file data

### Diagram



### Characteristics

Metadata description sets are expressed in a layout that uses a set of string encoding schemes to specify entities and elements taken from the RDA Registry.

Descriptions of the resource elements that comprise a single information resource are recorded in a single integrated metadata description set.

Descriptions of other entities that are associated with an information resource are recorded in a separate metadata description set for each entity.

The unstructured description and structured description recording methods are preferred for values taken from a vocabulary encoding scheme.

A metadata description set for an entity is not linked to a metadata description set of a related entity.

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## 183: Expression Excerpts

Gordon Dunsire, RSC Technical Team Liaison Officer, 4 October 2019

### Abstract

This paper discusses the issues in recording extracts of expressions and how they can be resolved in RDA Toolkit. The recommendations in the paper are based on a set of assumptions that are listed as propositions. Detailed proposals for additions to RDA guidance and instructions are dependent on agreement with the propositions and recommendations and are not included in this paper.

### Background

The development of instructions for compilations of works and expressions embodied as aggregates raises the issue of excerpts from expressions.

An expression excerpt is usually embodied as a component of an aggregate. There are two categories of use case:

- The plan of the aggregating work is to compile expression excerpts with a common characteristic. The result is a **collection aggregate**. Examples are compilations of opening lines of poems, quotations, excerpts from musical recordings, etc.
- The expression excerpt augments, or is augmented in, an aggregate. The result is an **augmentation aggregate**. Examples are a critical study on a monologue from a play, a monologue from a play used to illustrate a text on contemporary drama conventions, etc.

The LRM does not discuss expression excerpts. FRBRoo has a sub-class for Expression Fragment, but this is being deprecated in LRMoo.

### Expression parts

The whole-part relationship for works, expressions, and manifestations is defined in the Library Reference Model (LRM); it “holds for all the expressions and manifestations of the larger work and of its component works, whether the expression or manifestation comprises the full larger work or just one or more (but not all) of the component works”. The relationship is also “an inherent aspect of the *works*” (emphasis in the original).

This means that the relationship is part of the characteristics of a work, and all expressions and manifestations of a whole-part work follow the same structural relationship. That is, a work that has two parts is realized by an expression that has two parts, and is embodied by a manifestation that has two (logical) parts. An expression or manifestation does not have to realize or embody all of the parts, but it cannot have more parts than the work.

The LRM also states “An aggregate should not be confused with *works* which were created with parts, such as multipart novels”. Again, the emphasis is on the work as the entity that governs the whole-part relationship.

The evidence of a whole-part work in a manifestation may be:

- A manifestation statement that contains information that there is a whole-part work; e.g. “The fourth part of the trilogy”.
- A manifestation statement that indicates that it embodies a part; e.g. “Part 2”; “II”.
- A manifestation statement that indicates that there is a broader work; e.g. a statement of series; a common title such as “The chronicles of a daily life”.

On this basis, the whole-part relationship can be extended to any part that has a designation:

- An enumeration.
- A distinct title.

That is, a chapter that is numbered or titled is a part of a textual work. For example, “Section 1” is a part of the current RDA Toolkit, and “3”, “Describing carriers”, and “3 DESCRIBING CARRIERS” are titles of one part of “Section 1”. In principle, this can be taken to the finest designated level of granularity: “11.2.2.8”, “Initial articles”, and “11.2.2.8 Initial Articles” are titles for a part of the current Toolkit.

However, “EXAMPLE” does not indicate a part of “11.2.2.8” because the rest of the content of 11.2.2.8 does not have a separate designation.

A further condition for a whole-part relationship is:

- All of the parts of a whole must have a designation.

***Proposition 1: The enumeration or title designation of all of its parts is an inherent aspect of a whole-part work.***

Generally, such enumerations and titles are ignored as significant aspects of the content of an expression. An expression that omits chapter headings and titles does not cross the new work boundary.

Conversely, an expression that adds such enumerations or titles does not cross the boundary from a single-part to multi-part work.

This suggests that the whole-part characteristic of a work is determined by a representative expression that is the first realization of the work.

**Proposition 2: A whole-part work is identified by the enumeration or titles present in a representative expression of the work, which is usually the expression embodied by the first manifestation of the work.**

### Expression excerpts

An expression excerpt is not designated as a part in a representative expression of a whole-part work. It is therefore not evidence of a whole-part work in any expression or manifestation of the work. In particular, a whole-part manifestation may have physical parts that are not evidence of a whole-part work.

**Proposition 3: An expression excerpt is not an expression part.**

An expression excerpt does not have a corresponding work “excerpt”.

An expression excerpt may be embodied in a distinct manifestation that is not an aggregate. In that case, the new work boundary is crossed if the excerpt is not a significant portion of the full expression. The excerpt becomes a ‘whole’ expression of the new work. The new work has a derivation relationship with the original work (“based on work”/“derivative work”).

There is a similarity with the abridgement relationship. An abridged expression can cross the new work boundary to become a realization of a new work.

**Proposition 4: An expression excerpt is a distinct expression that realizes the original work or a derived work.**

As a distinct expression, an expression excerpt is usually embodied by an aggregate manifestation.

### Excerpt relationship

There is utility in relating an expression to an expression excerpt or vice-versa.

**Recommendation 1: Add a new relationship element for Expression: [has] excerpt, with an inverse of Expression: [is] excerpt of.**

Toolkit label: excerpt

Toolkit definition: An expression that is an extract from another expression of the same work.

Domain: Expression

Range: Expression

This is a sub-type of **Expression: derivate expression**.

Toolkit label: excerpt of

Toolkit definition: An expression from which an expression is extracted.

Domain: Expression

Range: Expression

This is a sub-type of **Expression: based on expression**.

## Expression access point qualifier

An excerpt of an expression typically has no intrinsic title or identifier, so an access point may be derived from an access point for the original expression.

This may be achieved by applying a string encoding scheme that qualifies the scheme used for the original expression. The qualifier component simply indicates that the expression is an excerpt, and does not need to differentiate between different excerpts of the same original expression. The standard approach in RDA is to specify a fixed-text qualifier, such as “Works” or “Saint”, that can be a component of a string encoding scheme.

This approach results in the collocation of excerpt expressions and the original expression.

***Recommendation 2: Add ‘Excerpt’ as a qualifier in the RDA instructions for Expression: access point for expression.***

Example:

Original **Expression: access point for expression**: “Austen, Jane | Emma | English | Text”

Excerpt **Expression: access point for expression**: “Austen, Jane | Emma | English | Text | Excerpt”

Note: The qualifier and relationship element are the same word, differentiated by the case of the first letter. This does not result in a duplicate entry in the Toolkit Glossary because entries are not included for qualifiers

## Category reference

An excerpt expression is a kind of Expression. It is RSC policy to avoid creating an entity sub-type or subclass, and to not specify a VES for LRM “category” elements such as **Work: category of work** or **Expression: category of expression**.

The preferred approach is to use a “soft” category, such as “musical work” or “collection aggregate”, that is defined in RDA Terms.

There is a requirement to add a soft category for excerpt expressions, for use in guidance, instructions, and conditions.

***Recommendation 3: Add “expression excerpt” to RDA Terms.***

Preferred label: “expression excerpt”

Definition: “An extract from an expression.”

## Instruction condition

The qualifier is only applicable to an expression that is an excerpt. This is indicated in the Toolkit by adding a condition to the options for using the qualifier.

The condition will apply to optional instructions in **Expression: access point for expression** and to string encoding schemes specified in the Toolkit. The condition should be boilerplate for ease of re-use and translation.

***Recommendation 4: Add boilerplate for the condition “An expression is an excerpt expression.”.***

## Compilations of excerpts

Several expression excerpts may be incorporated in a collection aggregate.

A compilation of expression excerpts is covered by the instructions for other kinds of compilation, such as works or expressions created by one agent or of a specific “form” such as poems. In all cases, what is aggregated are expressions, irrespective of how the aggregate describes itself.

The specific cases to accommodate are:

- a) Excerpts from expressions created by one agent.
- b) Excerpts from expressions of a single category (or content type) created by one agent.
- c) Excerpts from all of the expressions created by one agent, or at least one expression of every work created by one agent.
- d) Excerpts from all of the expressions of a single category created by one agent, or at least one expression of every work of a single category created by one agent.
- e) Excerpts (non-contiguous) from a single expression.

## Conventional collective title

An access point for an aggregating work that is embodied by a collection aggregate uses one or more fixed-text components to indicate the scope of the plan for aggregation relative to an agent who creates the expressions that are aggregated.

“Works” indicates that the scope matches case c).

“Selections” indicates that the scope matches case a)

Another conventional collective title, such as “plays”, indicates that the scope matches cases b) and d).

Case e) is not accommodated by the existing conventional collective titles.

***Recommendation 5: Use the conventional collective title “excerpts” for compilations of expression excerpts.***

Examples:

“Austen, Jane | Works | Excerpts”

“Austen, Jane | Selections | Excerpts”

“Shakespeare, William | Plays | Selections | Excerpts”

## Next steps

The detail of additional guidance and instructions is dependent on the outcomes of discussion.

***Recommendation 6: Add guidance and instructions for describing expression excerpts to RDA Toolkit, using the elements, boilerplate, condition, kinds of compilation, and conventional collective title described in other recommendations.***

This will require additions to instructions for:

- **Expression: access point for expression**
- **Work: access point for work**

The specific elements that will be augmented are dependent on the outcome of discussion of how the Toolkit should accommodate specific string encoding schemes.

There is no requirement to amend existing beta Toolkit content.

## Recommendations

***Proposition 1: The enumeration or title designation of all of its parts is an inherent aspect of a whole-part work.***

***Proposition 2: A whole-part work is identified by the enumeration or titles present in a representative expression of the work, which is usually the expression embodied by the first manifestation of the work.***

***Proposition 3: An expression excerpt is not an expression part.***

***Proposition 4: An expression excerpt is a distinct expression that realizes the original work or a derived work.***

***Recommendation 1: Add a new relationship element for Expression: [has] excerpt, with an inverse of Expression: [is] excerpt of.***

***Recommendation 2: Add ‘Excerpt’ as a qualifier in the RDA instructions for Expression: access point for expression.***

***Recommendation 3: Add “expression excerpt” to RDA Terms.***

***Recommendation 4: Add boilerplate for the condition “An expression is an excerpt expression.”.***

***Recommendation 5: Use the conventional collective title “excerpts” for compilations of expression excerpts.***

**Recommendation 6: Add guidance and instructions for describing expression excerpts to RDA Toolkit, using the elements, boilerplate, term, condition, kinds of compilation, and conventional collective title described in other recommendations.**

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## 184: RDA Content Elements

Gordon Dunsire, RSC Technical Team Liaison Officer, 4 October 2019

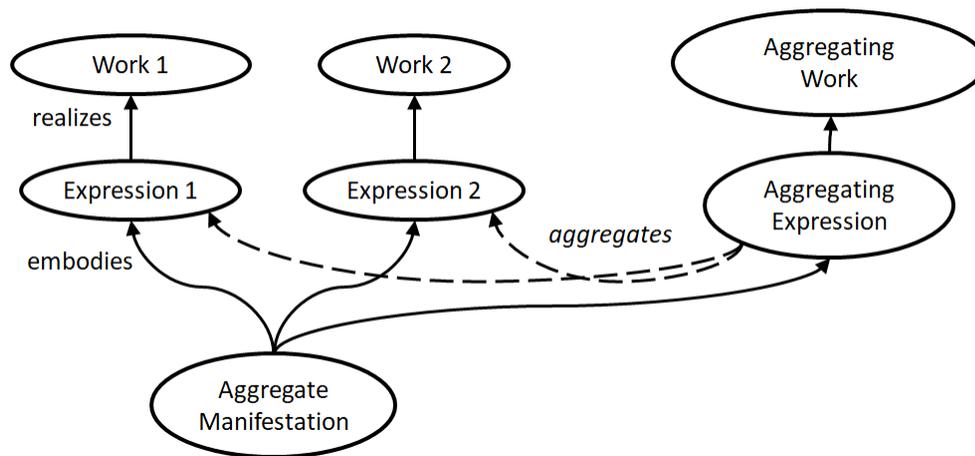
### Abstract

This paper makes recommendations for developing expression “content” elements to conform to the aggregates model. The paper does not address the need for additional elements to improve the recording of aggregating expressions and aggregating works.

### Background

#### Aggregates model

This diagram shows the basic model for aggregates in the Library Reference Model:



An aggregate manifestation embodies two or more distinct expressions<sup>3</sup> and an aggregating expression that realizes the plan for aggregating the other expressions.

An aggregating expression is related to an expression that is aggregated by the shortcut relationship element **Expression: aggregates**. The full relationship is the chain from aggregating expression to aggregate manifestation to expression that is aggregated:

- Aggregating Expression [has] **manifestation of expression** Aggregate Manifestation
- Aggregate Manifestation [has] **expression manifested** Expression X

The shortcut avoids a description of the aggregate manifestation or a direct relationship between the aggregate manifestation and an expression that is aggregated. The latter usage reduces duplication if the same aggregating expression is embodied in multiple manifestations: the aggregate manifestation is described and related only to the aggregating expression.

The recording of separate entities for the expressions or works embodied by an aggregate manifestation is optional. An application can choose to record any or all of the aggregating expression and work, or any or all of the expressions that are aggregated and their works.

## Contributor relationship elements

There are use cases for associating an agent who creates an expression or work with the aggregate manifestation, without recording the intermediary expression or work.

The original ‘contributor’ relationship designators have been recast as shortcut relationship elements in the beta Toolkit. A shortcut is a linked chain of two or more relationship elements that omits the intermediary entities.

For example, an aggregate manifestation can be directly associated with an agent who creates an expression that is aggregated using **Manifestation: contributor agent to aggregate**. This is a shortcut for:

1. Aggregate Manifestation [has] **expression manifested** Expression 1
2. Expression 1 [has] **creator agent of expression** Agent 1

Sub-types of this shortcut relationship element accommodate specific kinds of expression and work that are based on the RDA Content Type vocabulary encoding scheme. For example, **Manifestation: contributor agent of music** is restricted to intermediary expressions that have content type ‘notated music’, ‘performed music’, or ‘tactile notated music’. Any of these indicates an expression of a ‘musical work’. This ties references in the original Toolkit to ‘musical work’, ‘moving image work’, etc. to the RDA/ONIX Framework as a set of ‘soft’ categories for work that are defined in the Glossary but are not a formal vocabulary encoding scheme.

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<sup>3</sup> In some cases, there is only one expression that is aggregated. For example, the plan may be to aggregate an ‘annual top 5’ of expressions; if no expressions are published in a particular year, the aggregate is not published, if only one expression is published that year, the ‘aggregate’ is published.

Recasting the original 'contributor' elements to conform to the aggregates model required changing the domain from Expression to Manifestation, as well as clarifying the definitions and amending the labels for consistency.

## Content elements

The following original Toolkit elements have not been recast to align them with the aggregates model:

- Expression: accessibility content
- Expression: colour content
  - Expression: details of colour content
  - Work: colour content of representative expression
- Expression: illustrative content
  - Expression: details of illustrative content
- Expression: sound content
  - Work: sound content of representative expression
- Expression: supplementary content

The current definitions of the elements are given in Appendix 1.

Most of the content elements have the context of an augmentation aggregate of two or more distinct expressions, with an assumption that one or more expressions are 'primary' and the rest are 'supplementary'. Some of the elements are also applicable to a collection aggregate, where all the expressions are more or less equal.

**Expression: content type** is a fundamental element for categorizing a distinct expression. The content elements can be aligned with all or some of the RDA Content Type terms, as shown in Table 1.

This provides the basis of two categories of content element:

- Elements that indicate a category of content (i.e. category of expression) that is not specifically based on content type:
  - accessibility content
  - supplementary content
- Elements that are restricted to a subset of content types:
  - colour content
  - illustrative content
  - sound content

The content elements are redundant in the context of describing an expression that is aggregated because the expression can be assigned a content type or category of expression that conveys the same information at a finer level of granularity.

The elements represent a range of semantics with respect to the RDA ontology.

"accessibility content" and "supplementary content" record values that may be taken from a vocabulary encoding scheme. The context is too wide to justify the development of RDA vocabulary encoding schemes for these elements.

“illustrative content” records values from a vocabulary encoding scheme, and RDA provides a VES. The data are only relevant to expressions with ‘image-like’ content types, including tactile images.

“colour content” records values from a vocabulary encoding scheme, and RDA provides a VES. The data are only relevant to expressions with ‘image’ and ‘text’ content types, excluding tactile images and text. “details of colour content” is used for unstructured descriptions and colour terms, and should be removed. A new element for ‘colour’ can record values from a vocabulary encoding scheme. The context is too wide to justify the development of an RDA vocabulary encoding scheme for this element.

The ‘sound content’ values of ‘sound’ and ‘silent’ correspond to a content type of performed music, sounds, or spoken word, or the absence of these content types, respectively. These values are a ‘dumbing-up’ or lossy indicators of the specific content types. An additional factor is that this element is currently the basis of a representative expression element, so there is some utility for a Work element for this characteristic. This element only has utility in the context of an aggregate, as a sound expression augmenting a primary expression.

The content elements have utility as shortcuts from an aggregating expression to an indication of the content type or category of an expression that is aggregated. The shortcut is more appropriate for an aggregating expression than an aggregate manifestation because the values are limited to expression characteristics.

### Aggregating expression

The RDA term ‘aggregating expression’ is defined as: An expression that is the realization of an aggregating work that selects and arranges expressions of one or more works, and embodies them in an aggregate.

The definition refers only the context of the aggregating work.

The RDA term ‘aggregating work’ is defined as: A work that is a plan to select and arrange one or more expressions of one or more works, and embody them in an aggregate.

The definition does not refer to an aggregating expression.

The definitions reflect the LRM’s treatment of aggregating works and expressions. The LRM defines an aggregating expression in terms of the aggregating work. The LRM uses ‘aggregating expression’ and ‘expression of an aggregating work’ interchangeably. The only additional information about an aggregating expression is given in the scope note for LRM-R25 (was aggregated by/aggregated):

“Unlike the whole-part relationship between *expressions*, the *expressions* selected to appear together in the aggregate *manifestation* do not become components of the aggregating *expression*. Furthermore, the relationship between these *expressions* is not an inherent feature of the *works* that these *expressions* realize, and thus is does not hold in other *expressions* of those *works*.”

**Proposition 1: An aggregating expression does not accumulate or inherit the characteristics of the expressions that are aggregated.**

An aggregating expression that ‘aggregates’ a set of expressions that are English texts does not itself have English as a language of expression or text as a content type.

***Proposition 2: No descriptive elements for an expression are applicable to an aggregating expression.***

An aggregating expression has no intrinsic characteristics that are worth recording.

A description of an aggregating expression must conform to the minimum description of an expression:

- At least one appellation element
- **Expression: work expressed** for the aggregating work
- **Expression: manifestation of expression** for the aggregate manifestation.

***Proposition 3: Only the relationship elements for a minimum description are applicable to an aggregating expression.***

All of the other elements useful for describing an aggregating expression are shortcuts, including **Expression: aggregates** and the shortcuts proposed in this paper.

This paper only addresses the existing content elements.

Separate proposals are required to identify other useful shortcuts, such as relating an aggregating expression to a language or content type of the aggregated expressions.

An aggregating work is realized by one and only one aggregating expression. This means that the aggregating expression is the only possible representative expression for an aggregating work.

A shortcut for an aggregating expression may be the basis of a representative expression element for an aggregating work. The value of a shortcut for an aggregating expression may be used as a component of an access point for work.

## supplementary content

***Recommendation 1: Redefine or deprecate Expression: supplementary content because it is not conformant with the model of aggregates.***

***Option 1: Redefine Expression: supplementary content as a shortcut.***

Shortcut:

1. **Expression: manifestation of expression** [for an aggregating expression]
2. **Manifestation: expression manifested** [for an expression that is aggregated]
3. **Expression: category of expression** [for a category of supplementary content taken from an unspecified vocabulary encoding scheme]

Definition: An indication of the kinds of expression that supplement the main expressions that are embodied by an augmentation aggregate.

Scope note: Supplementary content includes an index, a bibliography, an appendix, etc.

This has no impact on legacy values.

## accessibility content

**Recommendation 2: Redefine or deprecate Expression: accessibility content because it is not conformant with the model of aggregates.**

**Option 2: Redefine Expression: accessibility content as a shortcut**

Shortcut:

1. **Expression: manifestation of expression** [for an aggregating expression]
2. **Manifestation: expression manifested** [for an expression that is aggregated]
3. **Expression: category of expression** [for a category of accessibility content taken from an unspecified vocabulary encoding scheme]

Definition: An indication of the kinds of expression that provide alternative sensory modes to perceive the main expressions that are embodied by an augmentation aggregate.

Scope note: Accessibility content includes accessible labels, an audio description, captioning, image descriptions, sign language, and subtitles. Accessibility content does not include subtitles in a language different from the spoken content.

This is an element sub-type of **Expression: supplementary content**.

This has no impact on legacy values.

**Option 3: Add a shortcut element for Manifestation: accessibility content**

Shortcut:

1. **Manifestation: expression manifested** [for an expression that is aggregated]
2. **Expression: category of expression** [for a category of accessibility content taken from an unspecified vocabulary encoding scheme]

Definition and scope note are the same as Option 2.

This shortcut allows information about accessibility of content and carrier to be recorded for a manifestation.

## illustrative content

**Recommendation 3: Redefine or deprecate Expression: illustrative content and Expression: details of illustrative content because they are not conformant with the model of aggregates.**

**Option 4: Redefine Expression: illustrative content as a shortcut.**

Shortcut:

1. **Expression: manifestation of expression** [for an aggregating expression]
2. **Manifestation: expression manifested** [for an expression that is aggregated]
3. **Expression: category of expression** [for a category of illustrative content taken from the **RDA Illustrative Content** vocabulary encoding scheme]

Definition: An indication of the kinds of expression of image content that supplement the main expressions that are embodied by an augmentation aggregate.

Scope note: Illustrative content applies to an aggregate that embodies an expression with a content type of “cartographic image”, “cartographic moving image”, “cartographic tactile image”, “cartographic tactile three-dimensional form”, “cartographic three-dimensional form”, “three-dimensional moving image”, “two-dimensional moving image”, “tactile three-dimensional form”, “three-dimensional form”, “still image”, or “tactile image”. Tables containing only words or numerical data are excluded.

This is an element sub-type of **Expression: supplementary content**.

This has no impact on legacy values, which may include unstructured descriptions mapped from **Expression: details of illustrative content**, or taken from the RDA vocabulary encoding scheme or a local vocabulary encoding scheme.

## colour content

**Recommendation 4: Replace Expression: details of colour content with a new element for the specific colours found in the content of an expression.**

Add an element for **Expression: colour**

This element subsumes **Expression: details of colour content**. Details are recorded as an unstructured description.

A structured description, identifier or notation, or IRI are taken from a local vocabulary encoding scheme for colours. There are many controlled vocabularies for colour.

The element uses the default layout and instructions for VES elements that do not have an associated RDA vocabulary.

**Option 5: Add a scope note to Expression: colour content to restrict it to specific content types.**

Scope note: Colour content applies to an expression with a content type of “cartographic image”, “cartographic moving image”, “cartographic three-dimensional form”, “notated movement”, “notated music”, “performed movement”, “still image”, “text”, “three-dimensional moving image”, “three-dimensional form”, or “two-dimensional moving image”.

## sound content

**Recommendation 5: Redefine or deprecate Expression: sound content because it is not conformant with the model of aggregates.**

**Option 6: Redefine Expression: sound content as a shortcut.**

Shortcut:

1. **Expression: manifestation of expression** [for an aggregating expression]

2. **Manifestation: expression manifested** [for an expression that is aggregated]
3. **Expression: category of expression** [for a category of sound content taken from the **RDA Sound Content** vocabulary encoding scheme]

***Option 7: Add a scope note to Expression: sound content to restrict it to specific content types.***

Scope note: Sound content is present in an expression with a content type of “recorded music”, “sounds”, or “spoken word”.

## Further development

Investigate the need for additional elements to improve the recording of aggregating expressions and aggregating works. For example, should Expression: language of content, which is now subsumed into Expression: language of expression, be reinstated as a shortcut relationship for an aggregating expression?

## Recommendations and options

***Proposition 1: An aggregating expression does not accumulate or inherit the characteristics of the expressions that are aggregated.***

***Proposition 2: No descriptive elements for an expression are applicable to an aggregating expression.***

***Proposition 3: Only the relationship elements for a minimum description are applicable to an aggregating expression.***

***Recommendation 1: Redefine or deprecate Expression: supplementary content because it is not conformant with the model of aggregates.***

***Recommendation 2: Redefine or deprecate Expression: accessibility content because it is not conformant with the model of aggregates.***

***Recommendation 3: Redefine or deprecate Expression: illustrative content and Expression: details of illustrative content because they are not conformant with the model of aggregates.***

***Recommendation 4: Replace Expression: details of colour content with a new element for the specific colours found in the content of an expression.***

***Recommendation 5: Redefine or deprecate Expression: sound content because it is not conformant with the model of aggregates.***

***Option 1: Redefine Expression: supplementary content as a shortcut.***

***Option 2: Redefine Expression: accessibility content as a shortcut***

***Option 3: Add a shortcut element for Manifestation: accessibility content***

***Option 4: Redefine Expression: illustrative content as a shortcut.***

*Option 5: Add a scope note to Expression: colour content to restrict it to specific content types.*

*Option 6: Redefine Expression: sound content as a shortcut.*

*Option 7: Add a scope note to Expression: sound content to restrict it to specific content types.*

## Appendix 1: Definitions, etc. of current content elements.

### Expression: accessibility content

Definition: An indication of content that provides alternative sensory modes to perceive the primary content of an expression.

Scope note: Accessibility content includes accessible labels, audio description, captioning, image description, sign language, and subtitles. Accessibility content does not include subtitles in a language different from the spoken content.

### Expression: supplementary content

Definition: An indication of content that updates or complements the primary content of an expression.

Scope note: Supplementary content includes an index, a bibliography, an appendix, etc.

### Expression: colour content

Definition: A presence of colour, tone, etc., in the content of an expression.

Scope note: Black, white, single colour shades of black, single colour tints of white, and single colour tones of gray are considered to be single colours.

**RDA VES:** monochrome, polychrome

### Work: colour content of representative expression

Definition: A presence of colour, tone, etc., in the content of a representative expression of a work.

### Expression: details of colour content

Definition: Details of a presence of colour, tone, etc., in the content of an expression, and the specific colours, tones, etc., including black and white, present.

### Expression: illustrative content

Definition: A presence of **image content** that accompanies the primary content of an expression.

Scope note: Tables containing only words or numerical data are excluded.

**RDA VES:** coat of arms, etc.

### Expression: details of illustrative content

Definition: Details of content intended to illustrate the primary content of an expression.

**Expression: sound content**

Definition: A presence or absence of sound in an expression.

**RDA VES:** silent, sound

**Work: sound content of representative expression**

Definition: A presence or absence of sound in a representative expression of a work.

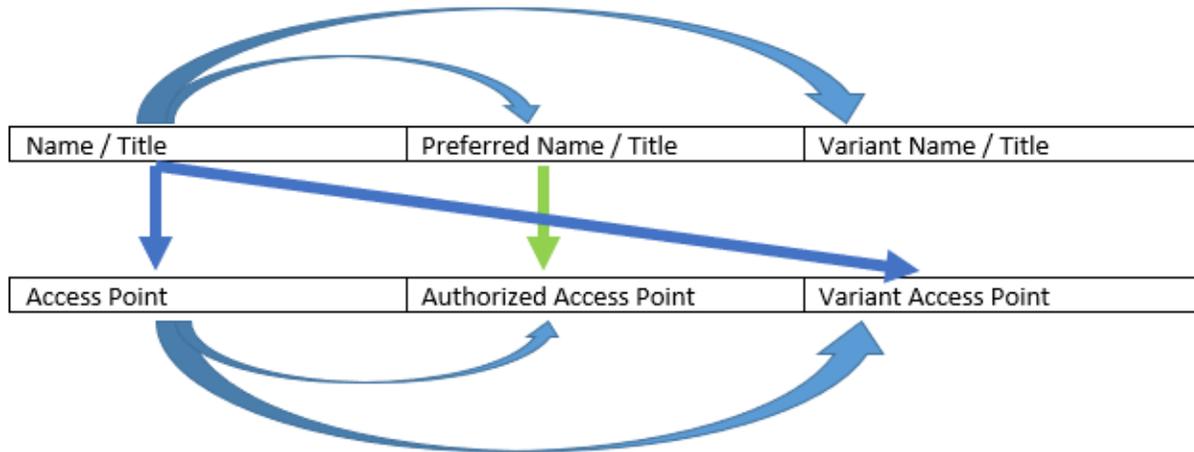
**Table 1: Alignment of content elements with RDA Content Type terms.**

<b>Content type</b>	<b>accessibility content</b>	<b>supplementary content</b>	<b>illustrative content</b>	<b>sound content</b>	<b>colour content</b>
cartographic dataset	Y	Y			
cartographic image	Y	Y	Y		Y
cartographic moving image	Y	Y	Y		Y
cartographic tactile image	Y	Y	Y		
cartographic tactile three-dimensional form	Y	Y	Y		
cartographic three-dimensional form	Y	Y	Y		Y
notated movement	Y	Y			Y
tactile notated movement	Y	Y			
performed movement	Y	Y			Y
computer dataset	Y	Y			
computer program	Y	Y			
three-dimensional moving image	Y	Y	Y		Y
two-dimensional moving image	Y	Y	Y		Y
notated music	Y	Y			Y
performed music	Y	Y		Y	
tactile notated music	Y	Y			
tactile three-dimensional form	Y	Y	Y		
three-dimensional form	Y	Y	Y		Y
still image	Y	Y	Y		Y
tactile image	Y	Y	Y		
tactile text	Y	Y			
text	Y	Y			Y
spoken word	Y	Y		Y	
sounds	Y	Y		Y	

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## 185: Points for discussion – Refresher on appellation elements and instruction moves

Submitted by Thomas Brenndorfer – 2019-10-07



In the new Toolkit, Preferred Name / Title and Variant Name / Title are categories of Name / Title.

In the new Toolkit, Authorized Access point and Variant Access Point are categories of Access Point.

A Name / Title is the basis of an Access Point.

This could also be worded as the Preferred Name / Title is the basis of an Access Point, which is an Access Point that is then the basis of the Authorized Access Point.

The Preferred Name / Title is used as a basis for Authorized Access Point. There are some exceptions, such as an Authorized Access Point for Expression being based on an Authorized Access Point for Work.

A Variant Access Point could be based on a Preferred Name / Title or a Variant Name / Title (hence, the pointing back to the Name / Title element from Variant Access Point).

### Unstructured Descriptions – Names / Titles

The common set of instructions under the base Name / Title elements include:

#### **Recording an unstructured description**

##### **OPTION**

Use any source of information.

Record the form found in the source of information.

Data provenance

**OPTION**

Record the guidelines or scheme that is used for a transcription. For general guidance, see Data provenance. [Recording a transcription standard used for metadata](#).

**OPTION**

Record a source of information. For general guidance, see Data provenance. [Recording a source of metadata](#).

Miscellaneous additional instructions in Name / Title base elements:

Title of manifestation. Includes options for different transcription guidelines.

Name of agent (collective agent, person, corporate body, family). Includes option for normalized transcription.

Title of work. Option to record a value of Title of manifestation.

Title of expression. Option to record a value of Title of work, and option to record a Title of manifestation.

Title of item. Option to record a value of Title of manifestation.

**Structured Descriptions – Access Points**

The common set of instructions under the base Access Point elements include:

**Recording a structured description**

**OPTION**

Use a vocabulary encoding scheme as a source of information.

Record the form found in the vocabulary encoding scheme. Do not modify the values or punctuation.

**OPTION**

Construct an access point by applying a string encoding scheme to the values of one or more other elements.

**Data provenance**

**OPTION**

Record a vocabulary encoding scheme that is used as a source of information. For general guidance, see Data provenance. [Recording a source of metadata](#).

**OPTION**

Record a string encoding scheme that is used to construct an access point. For general guidance, see Data provenance. [Recording a content standard used for metadata](#).

### **Key Instructions That Have Moved As A Result**

**Preferred name of person** – instructions for inverting the order because of surname (and some other cases) are moved to **Authorized access point for person**. The basic constructor instructions are in **Access point for person**.

**Preferred name of corporate body** – instructions for subordinate corporate bodies are moved to **Authorized access point for corporate body**. The basic constructor instructions are in **Access point for corporate body**.

**Preferred name of place** – instructions for constructing strings that include qualifiers and abbreviations are moved to **Authorized access point for place**. The basic constructor instructions are in **Access point for place**.

Miscellaneous cases.

Some of the pseudo-elements are affected, such as religious works where adding the larger book is part of constructing an access point. NOTE: **Variant access point for work** already includes instructions for constructing access point for books of the Bible, the Qur'an, and liturgical works that were previously under **Variant title of work**.

Additional elements for a manuscript with no title have been moved. Instructions are about adding elements, and so this is under **Authorized access point for work**.

Instructions for title proper that included a common title have been moved to **Access point for manifestation**. Details of constructing an access point for manifestation that includes common title, part title, and/or numbering within sequence under **Authorized access point for manifestation**.

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### **186: Points for discussion – Authorized access point for place**

Submitted by Thomas Brenndorfer – 2019-10-07

The following points arise from the movement of instructions for recording names for Place in the new Toolkit. Several of the points overlap, as there are nuances in the way the instructions interact. Several points include suggestions for further review or improvement.

**Point 1.** The old Toolkit had placeholder chapters for **Access point for place** [RDA 16.4]. The new Toolkit divides the instructions between the conventions for handling unstructured descriptions and the conventions for handling structured descriptions. The **Access point for place** elements are fully utilized in the new Toolkit, and any instructions for constructing structured descriptions have been moved there.

**Point 2.** The new Toolkit instructions (unlike the old Toolkit instructions) for recording a **Name of place** do not “indicate otherwise” for recording a form different than what appears on the source. The phrase “indicate otherwise” refers to what are now called instructions for structured descriptions. In the new Toolkit, a **Name of place** value is recorded as found on the source (subject only to transcription guidelines).

Old Toolkit. 16.2.1.3.

Record a name of place in the form found in the source from which the name is taken, unless the instructions at 16.2.2.8-16.2.2.13 indicate otherwise.

New Toolkit. **Name of place.**

Use any source of information.

Record the name found in the source of information.

Record the guidelines or scheme that is used for transcription.

**Point 3.** The old Toolkit provided two conventions for punctuation for **Preferred name of place**. In the new Toolkit, these punctuation patterns are part of two different string encoding schemes producing two different nomen strings that are now called access points for place.

Example. Old Toolkit

Preferred name of place #1: **Mexico City (Mexico)**

Preferred name of place #2: **Mexico City, Mexico**

NOTE: the same instruction for adding a larger place applies to both strings. One key difference in the strings is the punctuation patterns applied to the strings.

Example. New Toolkit

Preferred name of place: **Mexico City**

Access point for place #1 (SES #1): **Mexico City (Mexico)**

Access point for place #2 (SES #2): **Mexico City, Mexico**

NOTE: while the second form, “Mexico City, Mexico”, is commonly used as a component of other access points, its form also accounts for “vestigial” access points, as in this old catalog heading: “Peking, China”.

**Point 4.** The instruction for choosing a preferred name of place specifies choosing the form found in gazetteers, etc. However, unlike the old Toolkit, this is presented as an option in the new Toolkit. If this option is not followed then a name of place that occurs most frequently could be an option applied. The form found most frequently could, in fact, be in various forms that may include a larger place.

If there is an option for choosing a form that is found most frequently, then these strings could be chosen:

Chicago, Ill.

New York (N.Y.)

San Francisco

There should be an instruction that truncates the string so that only the string for the smaller place is chosen as the preferred name.

**Point 5.** In the new Toolkit, for access points for place, within *each* VES or SES, one string becomes the “authorized” form. In the old Toolkit, these were both called “preferred name of place”.

Both

**Mexico City (Mexico)**

and

**Mexico City, Mexico**

are “authorized” access points for place in their own context in the new Toolkit. Two “preferred” names have become two “authorized” access points. The instructions and any associated policies must specify the VES or SES for the particular “authorized access point for place” that is needed as a value for an element (such as elements used to construct other access points).

**Point 6.** In the new Toolkit abbreviations for places are not presented as an option in **Access point for place**.

The instructions appear as blanket instructions, which are to always abbreviate, except when a form of name is used in **Access point for corporate body** for a government or community.

However, the way those instructions are presented may not be the best way.

Suggestions for improvement:

- the instructions for abbreviations should be presented as options, and as options, selected by policies for each SES in which they are utilized.
- the unabbreviated form should apply to both **Access point for place** and **Access point for corporate body** in the context of an SES for access points for jurisdictions and governments, where a value based on the preferred name is not abbreviated [the current instruction for abbreviations in the new Toolkit only refers to “Access point for corporate body”]

**Point 7.** Additional elements like “State” are used in one string encoding scheme but not the other.

Examples (using the new Toolkit, where SES #1 is the LC authorized form and SES #2 is the form that results from applying the other SES and punctuation pattern):

Preferred name of place: **New York**

Access point for place #1 (SES #1): **New York (State)**

Access point for place #2 (SES #2): **N.Y.**

NOTE: SES #2 is just the abbreviation “N.Y.”. It is this string representing the state of New York that is used as a qualifier in other access points.

Preferred name of place: **Georgia**

Access point for place #1 (SES #1): **Georgia (Republic)**

Access point for place #2 (SES #2): **Georgia**

NOTE: for SES #2, “Georgia” is neither abbreviated nor qualified – it appears the same as the preferred name of place, but is actually the result of applying SES #2.

**Point 8.** Jurisdictions (Place) and governments (Corporate Body) use the same string for preferred name and authorized access point.

Question: should the access points for place and corporate body be distinguished (e.g., use different qualifiers)?

Preferred name of place (jurisdiction)	Preferred name of corporate body (government)	Authorized access point for place [SES #1] (jurisdiction)	Authorized access point for corporate body (government)
--	---	---	---

New York	New York	New York (State)	New York (State)
Georgia	Georgia	Georgia (Republic)	Georgia (Republic)
Alexandria	Alexandria	Alexandria (Vt.)	Alexandria (Vt.)
Farnham	Farnham	Farnham (Dorset, England)	Farnham (Dorset, England)

NOTE: SES #2, with the comma punctuation pattern, still appears in the qualifier added (e.g. “Dorset, England”). For SES #2, the abbreviation table also applies in all cases (e.g., “Vt.”).

**Point 9.** Constructing an authorized access point for place in the new Toolkit involves specifying strings for the elements included, as well as the VES or SES used.

Example ([https://beta.rdatoolkit.org/en-US\\_ala-2cb1e1db-40e9-364d-bd62-b6f04204e2f6/p\\_f4l\\_hpj\\_xfb](https://beta.rdatoolkit.org/en-US_ala-2cb1e1db-40e9-364d-bd62-b6f04204e2f6/p_f4l_hpj_xfb)) 54.28.77.41:

OPTION

Record a value that includes, in this order:

1. a value that is based on Place: **preferred name of place**
2. a value that is based on Place: **preferred name of place** for an intermediary place that is within a larger place or jurisdiction.
3. a value of Place: **authorized access point for place** for the larger place or jurisdiction

The three elements:

[ Pref Name of Place ] [ Pref Name of Intermediate Place ] [ \* AAP for Larger Place ]

\* AAP for Larger Place is **not** the LC AAP for Place – the other SES is used.

[ Farnham ] [ Dorset ] [ England ]

[ Oakdale ] [ Washington County ] [ Minn.]

The punctuation patterns:

Farnham (Dorset, England)

Farnham, Dorset, England

NOTE: this entire second string is the one that would be used for Farnham as a qualifier, such as for a place within Farnham (e.g., “Business District (Farnham, Dorset, England)”).

Oakdale (Washington County, Minn.)

Oakdale, Washington County, Minn.

**Point 10.** A third punctuation pattern appears for the case of a variant access point for a place within a city. The third punctuation pattern is the same one used for access points for subordinate corporate bodies.

Example (using new Toolkit elements):

Preferred name of place: **Cabbagetown**

Authorized access point for place: **Cabbagetown (Toronto, Ont.)**

Variant access point for place: **Toronto (Ont.). Cabbagetown**

NOTE: this last example actually embeds all three punctuation patterns. The whole string is the new pattern; the form “Toronto (Ont.)” follows the pattern for LC authority records; and “Ont.” by itself as an appellation of place that follows from applying the other SES.

**Point 11.** Policy statements will need to reflect the six-element arrangement for names and access points for place. The current policy statements include information about the particular SES used, but don't state it that way. In many cases, the current policy statements only need light rephrasing.

Examples:

LC-PCC PS for 16.2.2.2. “... **base** the preferred name on the form found in ...”

This policy should now be a choice of preferred name exactly as found using a particular source, and *then* subsequently about basing the access point for place on that preferred name [the policy statements often express this correctly, referring at times to the “preferred name” as the string found in the source].

LC-PCC PS for 16.2.2.4. Choice of Larger Place. “... when adding the **name** of a larger place as a qualifier ...”

This policy should now reflect the fact that an element is being added, not just a ‘name’. In particular, the element is an **Access point for place** using a particular SES (one that uses abbreviations and a particular punctuation pattern).

Examples: Torit (South Sudan); Charles Town (W. Va.); Cologne-Deutz (Cologne, Germany)

LC-PCC PS for 16.2.2.4 Form of Larger Place. "... if the **heading** for the larger place being added to the smaller place is created according to the provisions of ... do not include the term for type of jurisdiction ..."

The policy statement has an example: "Albany (N.Y.)" not "Albany (N.Y. (State))".

This policy should now reflect that the "heading" referred to is an access point in the new Toolkit, constructed using a particular SES (an SES that doesn't add a qualifier like 'State').

The two access points "New York (State)" and "N.Y." are constructed using different SES's. The policy statement could be restated by pointing to the particular SES that is used when adding an element for the larger place.