



North American RDA Committee RDA Update FORUM

Monday, August 3, 2020

R | D | A
Resource Description & Access

What is NARDAC?

- **N**orth **A**merican **RDA** **C**ommittee
- Represents the North American region on the RDA Steering Committee (RSC)
- Formed in January 2018

NARDAC Communities

- **United States**

- American Library Association (ALA)
- Library of Congress (LC)

- **Canada**

- Canadian Committee on Cataloguing (CCC)

[Bermuda, Greenland, Saint Pierre and Miquelon:
If/when they implement RDA]

Current members of NARDAC

American Library Association (ALA) Representatives

- Dominique Bourassa, Yale University, [NARDAC Chair](#)
- Stephen Hearn, University of Minnesota, [Back-up Representative to the RSC](#)

Canadian Committee on Cataloguing (CCC) Representatives

- Thomas Brenndorfer, Guelph Public Library, [NARDAC Representative to the RSC](#)
- Thi Bao Tran Phan, Library and Archives Canada

Library of Congress (LC) Representatives

- Damian Iseminger, Bibliographic Access Section, Music Division, [NARDAC coordinator of Web Content](#)
- Melanie Polutta, Policy, Training, and Cooperative Programs Division

RDA Board National Institution Representative from North America (ex officio)

- Merideth Fletcher, LAC



NARDAC Charge

- Formulate North American positions on RDA proposals, discussion papers, and drafts
- Keep the North American communities informed of RDA developments and RSC decisions
- Select a member of NARDAC to serve as the North American regional representative to the RSC
- Respond to other RSC initiatives as they arise
- Support the work of RSC by helping to identify possible members for the working groups

Source: NARDAC Terms of Reference

<http://www.rda->


[rsc.org/sites/all/files/North%20American%20RDA%20Committee_TermsOfReference2017.pdf](http://www.rda-rsc.org/sites/all/files/North%20American%20RDA%20Committee_TermsOfReference2017.pdf)

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NARDAC Goals

- Develop effective interaction with the communities NARDAC represents
- Become a support and information hub
- Provide direction to constituent groups that assume training responsibilities
- Extend outreach

NARDAC Challenges

- only 6 members representing a widespread region
-  for operations



[https://commons.wikimedia.org/wiki/File:Northern_America_\(orthographic_projection\).svg](https://commons.wikimedia.org/wiki/File:Northern_America_(orthographic_projection).svg)

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Switch over date
for the
beta RDA Toolkit



Presentations

- Recordings:

<https://www.youtube.com/c/RDAToolkitVideo>

- Slides: <http://www.rda-rsc.org/northamerica/presentations/>

RDA – Hot topics

Thomas Brenndorfer
RDA Forum – August 3, 2020

RDA Steering Committee meetings 2020

- January 6-9, 2020
- April 6-9, 2020
- July 6-9, 2020
- *planned – weeks of October 12 and October 19, 2020*

RDA Steering Committee meetings 2020

- January 6-9, 2020

String encoding schemes (chiefly for constructing access points)

- moved to policy statements; allow for scalability

Content elements for aggregates

- supplementary, accessibility, illustrative, colour, sound as *manifestation* shortcut elements

Implementation scenarios updated

- A – Linked open data; B – Relational or object-oriented data; C – Bibliographic/authority data; D – Flat file data

RDA Steering Committee meetings 2020

- April 6-9, 2020

Display labels for RDA elements

- progress report on NARDAC “friendly labels” project

Community vocabularies

- update on resources menu (former appendixes); eliminating Western focus; SES (string encoding scheme) project

Representative expression elements for aggregating works

- completion of content elements and aggregates issues

RDA Steering Committee meetings 2020

- July 6-9, 2020

RDA Entity boundaries

- i.e., when to make new descriptions for entities

Toolkit menu for Resources tab

- rearranging this menu for final release of Toolkit

RDA conformance and “well-formed data”

- RDA metadata statements (*subject-predicate-object*) are the building blocks for interoperability

Representative expression elements and their use for aggregating works

Representative expression elements for a work

Work



Language of Expression

Expression

Expression

Expression

Expression

Content Type

Date of Expression

Duration

Intended Audience of Expression

Medium of Performance of Musical Content

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Representative expression elements for a work

Work

Language of Representative Expression = English
Content Type of Representative Expression = text

Expression

Expression

Expression

Expression

Language of Expression = English

Content Type = text

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Representative expression

Work

Representative Expression

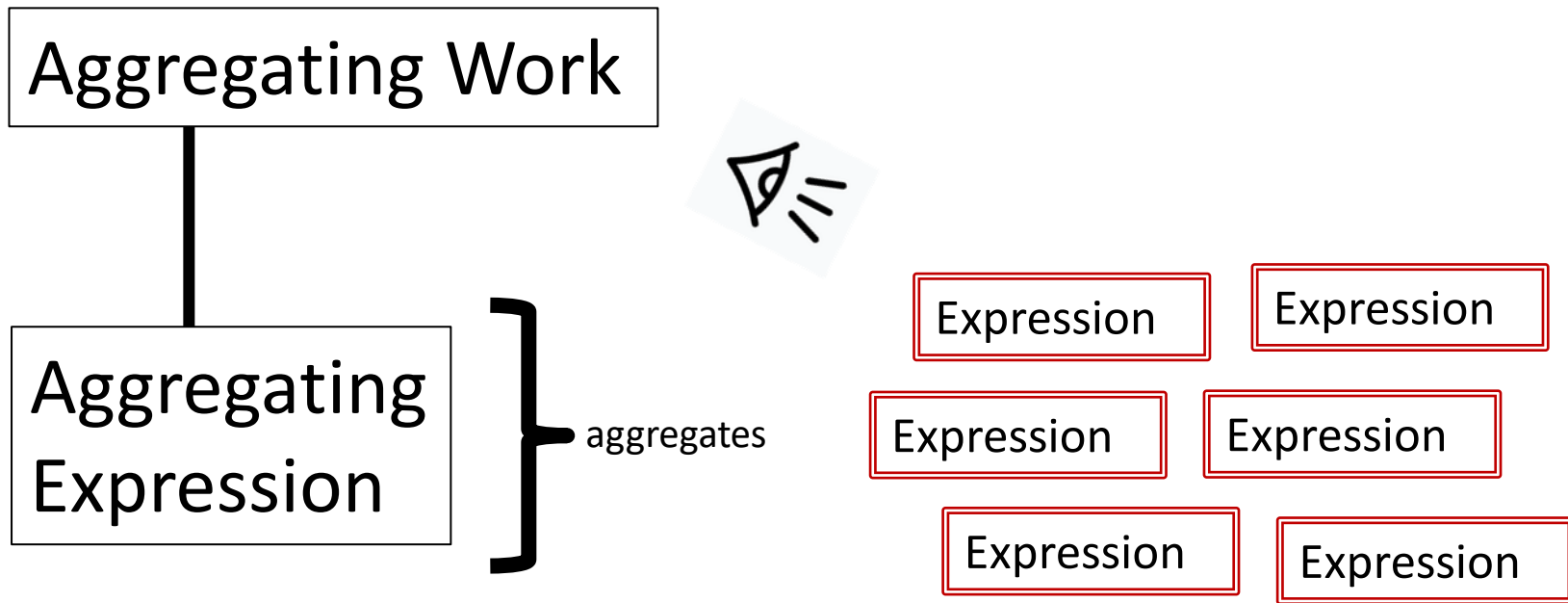
Expression

Expression

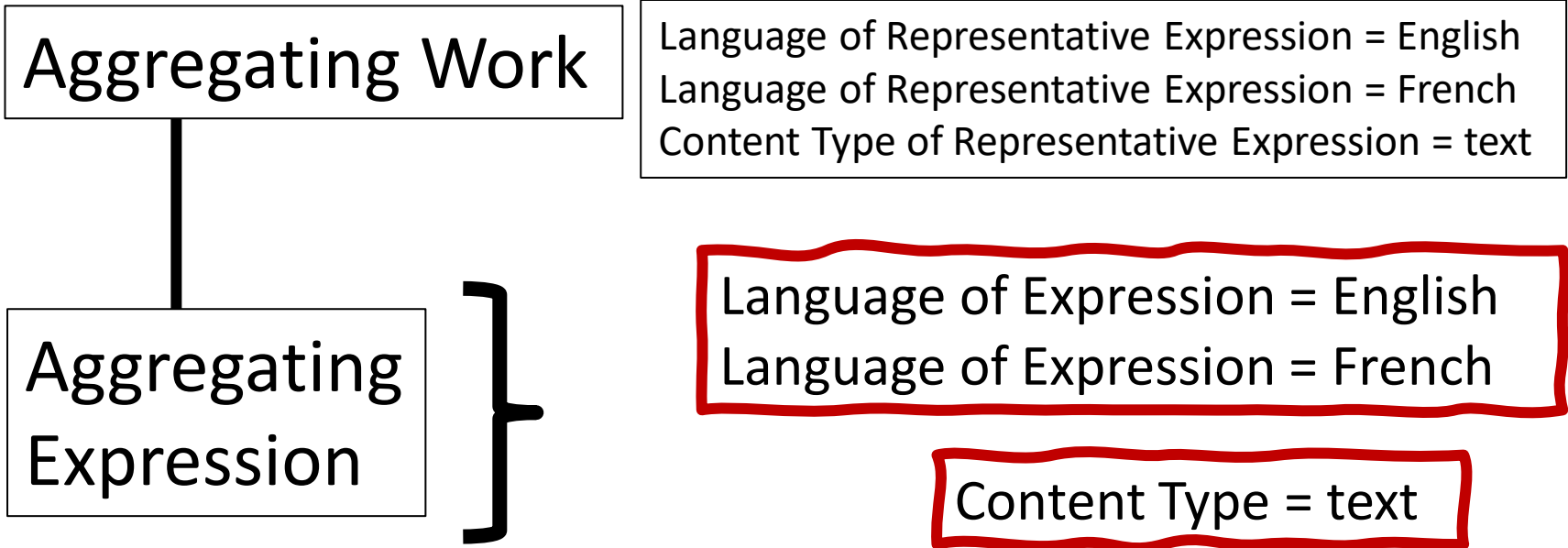
Expression

Expression

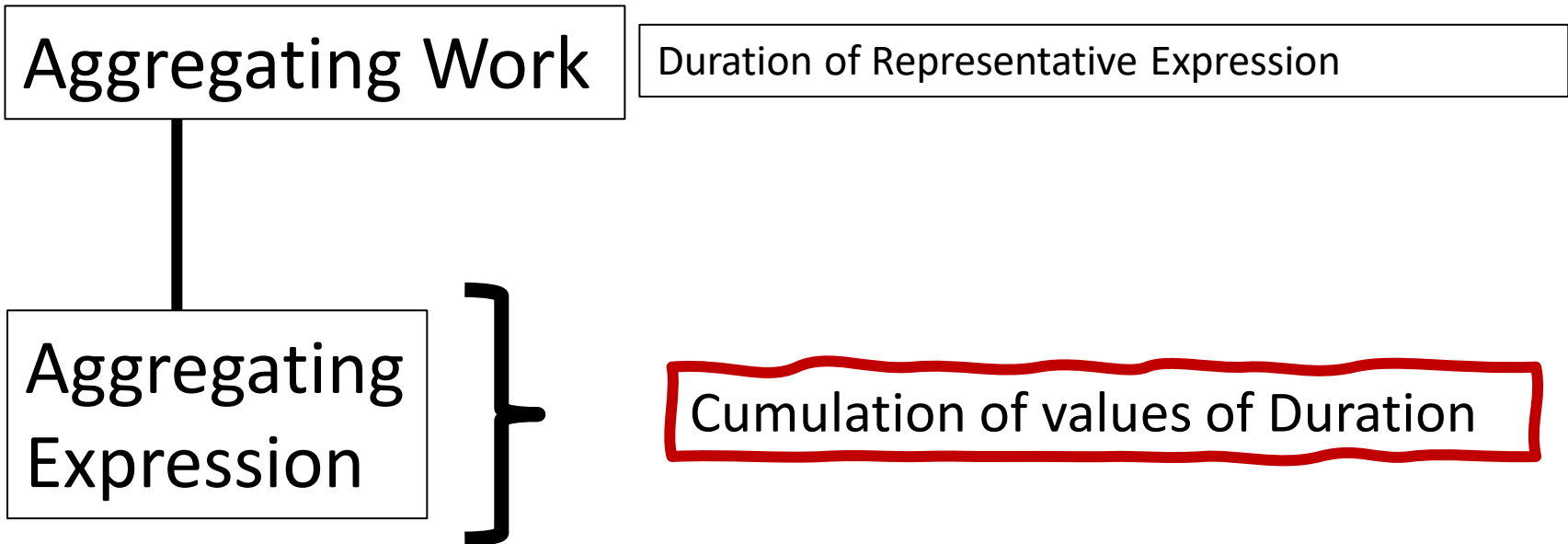
Representative expression elements for an aggregating work



Representative expression elements for an aggregating work



Representative expression elements for an aggregating work



Example: Different albums of the same songs could have different cumulative values for duration:

- different aggregating works because of differences in expressions aggregated
- but can be collocated under an **Authorized access point for work group**

Toolkit menu tab for Resources

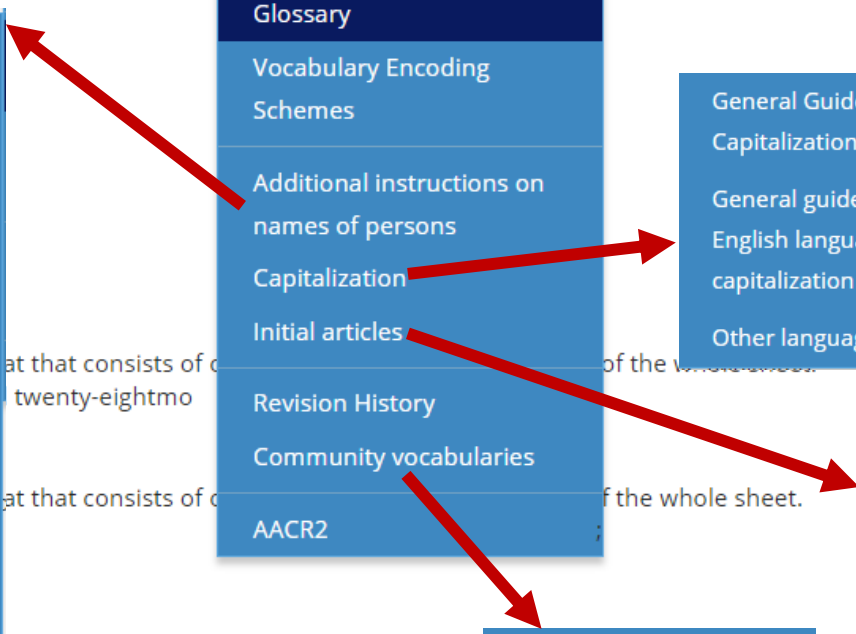
- Names in the Arabic alphabet
- Burmese and Karen names
- Chinese names containing a non-Chinese given name
- Icelandic names
- Indic names
- Indonesian names
- Malay names
- Roman names
- Romanian names containing a patronymic
- Thai names
- Recording surnames that include an article and/or preposition

- Glossary
- Vocabulary Encoding Schemes
- Additional instructions on names of persons
- Capitalization
- Initial articles
- Revision History
- Community vocabularies
- AACR2

- General Guideline for Capitalization
- General guideline for English language capitalization
- Other languages

- Initial articles listed by language
- Initial articles listed by word or words

- Abbreviations
- Books of the Bible
- Terms of rank
- Terms for collective titles
- Terms for gender
- Terms for medium of performance



Resources menu

Community Resources

Abbreviations

Abbreviations for countries and states
Abbreviations in Cyrillic script
Abbreviations in Greek script
Abbreviations in Hebrew script
Abbreviations in Latin script

Books of the Bible

Books of the Bible: Library of Congress-
Program for Cooperative Cataloging
Festlegungen für den deutschen Sprachraum
zum Erfassen der bevorzugten Titel von
biblischen Schriften
Livres de la Bible : Bibliothèque et Archives
Canada-Bibliothèque et Archives nationales
du Québec

Terms for collective titles

Terms for gender

Terms for medium of performance

Terms in specific languages

[toc for 64 languages from Afrikaans to
Yiddish]

Terms of rank

Resources

- Glossary
- Vocabulary encoding schemes
- Community resources
- Revision history
- AACR2

Capitalization of transcriptions
to be reviewed for **Guidelines
on normalized transcription.**

Additional instructions for
names of persons and initial
articles to be reviewed as part
of String Encoding Scheme
project.

Thank you!

RDA/PS conversion project update: the LC/PCC policy statements

Melanie Polutta

LC representative to NARDAC

What is the project?

Changing our documentation to work with the beta RDA Toolkit that will go live in December 2020 (RDA Toolkit)

Background information

- Documentation to be created:
 - Policy statements
 - Application profile
 - metadata guidance documentation
- Date of implementation **TBD** for RDA Toolkit released on December 15, 2020
- PCC Policy Committee (PoCo) agreed to project plan, with monthly status reports and issues requiring discussion

Changes

- Organization of beta RDA Toolkit is radically different
 - By high-level entity
 - Modular
- Fundamental changes in four areas of Diachronic Works, Element Labels, Data Provenance, Aggregates

Addressing the changes

- Joint LC/PCC Task Groups
 - Diachronic Works
 - Element Labels
 - Data Provenance
 - Aggregates

Who is working on it?

Policy, Training, and Cooperative Programs
Division leads the effort, with assistance from
LC catalogers and PCC PoCo

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Who is working on it in LC?

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

Parts of the project

- 6 phases, overlapping in time
 - Phase 1: Analyze policy statements
 - Phase 2: DITA markup conversion of PSs
 - Phase 3: Application profile
 - Phase 4: Testing of policy statements
 - Phase 5: Metadata guidance documents
 - Phase 6: Training
- Implementation!

Phase 1

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

Phase 2 & 3

- DITA team created:
 - Ivey Glendon, Daniel Griffin, Damian Iseminger, Clara Liao, Melanie Polutta, Manon Thérout
 - Currently studying DITA as a group
 - Batch of test policy statements created for April 29th update
 - Working out best practices so we are ready when Phase 1 is done
- Application profile
 - A format for AP spreadsheet has been established
 - Working out a methodology for how to handle it
- Phases 4, 5, & 6 not yet started

Challenges!

- Complexity of the work
- Growth of the project
 - String Encoding Scheme (SES) decision by RSC to hand these to community control
- Pandemic impact

Challenging, maddening, exciting, exhausting,
interesting work...

Thank you for your attention

If you would like to see more detail about this work, see this
link for a presentation:

<http://login.icohere.com/PCC?pnum=PGZ70039>

Getting ready for the new RDA Toolkit : updates from Library and Archives Canada

Thi Bao Tran Phan, CCC representative on NARDAC

LAC's context

- Bilingual national institution
 - Policy on bilingualism
- Bibliographic and authority records created in French, English, or both

Recent innovations at LAC

- LAC's catalogue in OCLC's WorldShare Management Services (WMS)
- LAC is a member of NACO
- Canadiana Name Authorities in French (Canadiana in WMS)
 - PFAN authorities file

Francophone Name Authority Programme (PFAN)

- Collaboration between LAC, Bibliothèque et Archives nationales du Québec (BAnQ) and fifteen university libraries from the Bureau de coopération interuniversitaire (BCI)
- Based on the NACO model for its gouvernance structure, programme and policies
- Officially launched on June 2020

Cataloguing at LAC

- Bibliographic records in WMS
- 2 files for authorities
 - LC/NACO
 - Canadiana/PFAN
- 3 files for subject headings
 - Library of Congress Subject Headings (LCSH)
 - Canadian Subject Headings (CSH)
(accessible in WMS via Canadiana)
 - Répertoire de vedettes-matières (RVM)
(accessible in WMS)

Current policy statements

- Bilingual
- Library system: Amicus
- LAC-BAC/BAnQ statements
 - LAC practice: available in English and French RDA
 - BAnQ practice: available in French RDA only

New policy statements

- Bilingual
- Specific to Canada and to LAC, while still closely aligned with LC
- Aligned with PCC
- Aligned with PFAN
- New library system: WMS
- Collaboration with BAnQ for the creation of policy statements in French in the RDA Toolkit

Actions before the implementation of the policy statements in the new RDA Toolkit

Planning of the work and the implementation date.

Analysis of the current policy statements in relation to the new RDA Toolkit.

Communicating to the Canadian library community via CCC.

Writing and revision of the English texts of statements specific to Canada and to LAC, based on policy statements by LC and PCC (NACO).

Translation of the statements to French.

Writing of the French texts of policy statements by the PFAN.

Translation of the statements to English.

Creating the statements in the RDA Toolkit.

Collaborating with BAnQ for the French statements.

Application profiles

- Analysis of staff's needs
- Elizabeth Sanders, acting manager of Description is a member of the Application Profiles Working Group

Implementation

- The implementation date of the policy statements is influenced by
 - Other priorities for 2020-2021
 - PFAN
 - French translation of the RDA Toolkit
 - LC/PCC policy statements
- LAC will communicate its implementation schedule in the fall

Questions?

Translating the new RDA Toolkit into French

North American RDA Committee Update Forum
August 3, 2020

Daniel Paradis

Translations Team Liaison Officer
Bibliographic Standards Librarian
Bibliothèque et Archives nationales du Québec



2010 : the beginnings

- Word file for
 - each chapter (including examples)
 - each appendix
 - glossary

- Word file of recurring phrases

6	Identifying Works and Expressions	Identification des œuvres et des expressions
6.0	Purpose and Scope	Objectif et champ d'application
	This chapter provides general guidelines and instructions on choosing and recording preferred and variant titles for works, and on recording other identifying attributes of the work or expression.	Ce chapitre fournit des lignes directrices générales et des instructions sur le choix et l'enregistrement des titres privilégiés et des variantes de titre des œuvres et sur l'enregistrement des autres attributs d'identification de l'œuvre ou de l'expression.
	The chapter also provides additional instructions on preferred and variant titles and other identifying attributes for musical works and expressions (see <mref>6.14</mref>– <mref>6.18</mref>), legal works (see <mref>6.19</mref>– <mref>6.22</mref>), religious works (see <mref>6.23</mref>– <mref>6.25</mref>), and official communications (see <mref>6.26</mref>).	Le chapitre fournit également des instructions supplémentaires sur les titres privilégiés et les variantes de titre et sur les autres attributs d'identification des œuvres et des expressions musicales (voir <mref>6.14</mref>–<mref>6.18</mref>), des œuvres juridiques (voir <mref>6.19</mref>–<mref>6.22</mref>), des œuvres religieuses (voir <mref>6.23</mref>–<mref>6.25</mref>) et des communications officielles (voir <mref>6.26</mref>).
	The chapter also provides guidelines on using the preferred title for a work with other identifying	Le chapitre fournit aussi des lignes directrices sur l'utilisation du titre privilégié d'une œuvre avec d'autres attributs d'identification de

No	Anglais	Français
1	This chapter sets out the functional objectives and principles underlying the guidelines and instructions in chapters ... on recording [attributes/data] ... and specifies core elements for the ... of those entities. (1.0)	Ce chapitre expose les objectifs fonctionnels et les principes qui sous-tendent les lignes directrices et les instructions dans les chapitres ... sur l'enregistrement des [attributs/données] ... et spécifie les éléments fondamentaux pour ... de ces entités. (1.0)
2	There are a number of terms used in this chapter and in chapters ... that carry meanings specific to their use in RDA. The meanings of a number of key terms are explained under ... Terms used as data element names are defined at the beginning of the instructions for the specific element. In addition, all terms used with a specific technical meaning are defined in the glossary. (1.1.1)	Certains termes utilisés dans ce chapitre et dans les chapitres ... possèdent une signification propre à leur utilisation dans RDA. La signification d'un certain nombre de termes-clés est expliquée sous ... Les termes utilisés comme noms d'éléments de données sont définis au début des instructions se rapportant à l'élément en question. De plus, tous les termes utilisés avec un sens technique particulier sont définis dans le glossaire. (1.1.1)
3	This chapter provides general guidelines and instructions on recording the attributes of ... (2.0)	Ce chapitre fournit des lignes directrices générales et des instructions sur l'enregistrement des attributs de... (2.0)
4	... apply the guidelines given under ... (2.1.1)	...appliquer les lignes directrices données sous... (2.1.1)
5	When preparing a [comprehensive/analytical] description, choose a source of information... (2.1.2.1)	Lors de la préparation d'une description [globale/analytique], choisir une source d'information... (2.1.2.1)
6	Apply the instructions given under ... (2.2.1)	Appliquer les instructions données sous... (2.2.1)

3R Project

- Translation and registry synchronization process implemented in 2017
- December 2017 release: Glossary and Appendices I, J, K and M in French translation were produced using RDA Registry data
- Preliminary step: translating RDA Reference using templates in CSV format

	F	G	H	I	J	K	L	M	N	
	ToolkitLabel_en	ToolkitLabel_fr	definition[0]_en	definition[0]_fr	ToolkitDefinition_en	ToolkitDefinition_fr	scope note[0]_en	scope note[0]_fr	*uri	*status
1	static plan	plan statique	An extension plan for a work intended to be realized in one or more distinct expressions that are all embodied simultaneously.	Plan d'extension d'une œuvre qui est destinée à être réalisée en une ou plusieurs expressions distinctes, toutes matérialisées en même temps.	An extension plan for a work intended to be realized in one or more distinct expressions that are all embodied simultaneously.	Plan d'extension d'une œuvre qui est destinée à être réalisée en une ou plusieurs expressions distinctes, toutes matérialisées en même temps.	Includes poems, photographs, and completed novels.	Comprend les poèmes, les photographies et les romans achevés.	RDAExtensionPlan:1001	Publis
2	integrating determinate plan	plan intégrateur déterminé	An extension plan for a work that is intended to be realized in one distinct	Plan d'extension d'une œuvre qui est destinée à être réalisée en	An extension plan for a work that is intended to be realized in one distinct	Plan d'extension d'une œuvre qui est destinée à être réalisée en	Includes project wikis, and conference websites.	Comprend les wikis de projets et les sites Web de congrès.	RDAExtensionPlan:1002	Publis

3R Project

- Data from the Registry will be used to populate
 - Parts of entity and element pages
 - Name of entity/element
 - Definition and Scope
 - Element Reference box
 - List of controlled terms
 - Glossary
 - Vocabulary encoding schemes

generation

Definition and Scope
A relationship between an original carrier and a carrier of a reproduction that is made from the original.

Element Reference

IRI
<http://rdaregistry.info/Elements/m/P30191>

Domain
Manifestation

Alternate labels
has generation


+ **MARC 21 Bibliographic**

- derivative master
- disc master
- duplicate (Deprecated)
- duplicate negative
- first generation
- master

3R Project

- And parts of examples

View in Context Example

 Example

Expression

has authorized access point for expression

Brunhoff, Jean de, 1899–1937. Babar en famille. English. Spoken word

has content type

spoken word

has place of capture

New York, New York

has date of capture

October 28, 1940

has language of expression

English

has date of expression

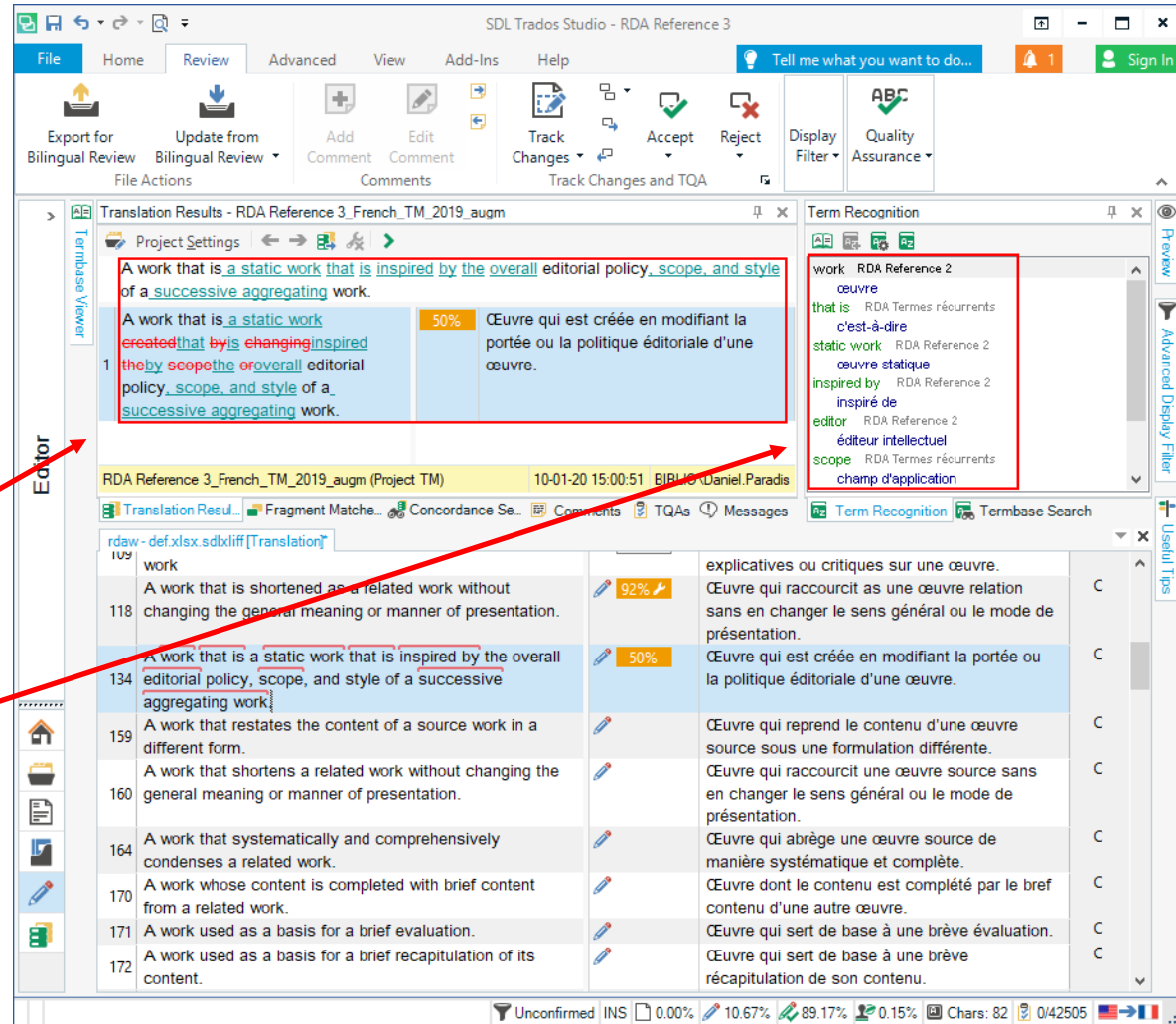
1940

has narrator agent

Luther, Frank, 1905–1980

3R Project

- SDL Trados Studio (computer-assisted translation tool)
- Includes tools to facilitate the translation process
 - translation memory
 - terminological databases



Outline of an element chapter

Translation table

- [name of element]
- Definition and Scope
- Element Reference
 - IRI
 - Domain
 - Range
 - Alternate labels
 - Dublin Core Terms
 - MARC 21 [Authority and/or Bibliographic]
- Prerecording
- Recording
- Recording an unstructured description
- Recording a structured description
- Recording an identifier
- Recording an IRI
- Related elements

en-US	es-ES	fr-FR	de-DE	it-IT	fi-FI	ca-ES
Glossary	<u>Glossario</u>	<u>Glossaire</u>	<u>Glossar</u>	<u>Glossario</u>	<u>Sanasto</u>	
Example	<u>Ejemplo</u>	<u>Exemple</u>	<u>Beispiel</u>	<u>Esempi</u>	<u>Esimerkki</u>	
Definition and Scope		<u>Définition et champ d'application</u>			<u>Määritelmä ja soveltamisala</u>	
Element Reference		<u>Renseignements sur l'élément</u>			<u>Elementintiedot</u>	
IRI		<u>IRI</u>			<u>IRI</u>	
Domain		<u>Domaine</u>			<u>Määrittelyjoukko</u>	

DITA model and boilerplate file

- DITA data model implemented in 2017
- Boilerplate file is an example of how the DITA model improved content management and the translation process
- Contains sentences and paragraphs that are frequently re-used in the RDA text
 - Improved, more granular version of recurring phrases document
- When needed in a specific instruction, boilerplate text is pulled into RDA instructions using content references or content key references
 - Boilerplate text needs to be translated and, if needed, revised only once

Boilerplate file

Comment: Conditions: Manifestation

A manifestation is issued in a single unit

A manifestation is issued in two or more units.

A manifestation is issued in two or more units in a container.

A manifestation is a facsimile or reproduction of another manifestation.


A manifestation is an *early print*

CONDITION

A manifestation is issued in two or more units.

There are edition statements relating to the whole as well as to parts,

Boilerplate file

- RDA has 3,017 elements (as of May 26)
- Instructions for 2,536 elements (84%) are composed entirely of boilerplate and will be translated automatically
 - Ex. “printer agent of” 
- Only instructions for 481 elements (16%) will have to be translated by a translator

printer agent of

Definition and Scope

A manifestation that involves a responsibility of an agent for manufacturing printed text, notated music, or other content from type or plates.

 [Element Reference](#)

Prerecording

Recording

Record this element as a value of Manifestation: [appellation of manifestation](#)^[3] or as an IRI.

Recording an unstructured description

Record an unstructured description for a related manifestation as a value of Manifestation: [title of manifestation](#)^[3].

For general guidance on unstructured descriptions, see [Guidance: Recording methods](#).

[Recording an unstructured description](#)^[3].

Recording a structured description

Record a structured description for a related manifestation as a value of Manifestation: [access point for manifestation](#)^[3].

For general guidance on structured descriptions, see [Guidance: Recording methods](#).

[Recording a structured description](#)^[3].

Issues encountered during translation

- Using parentheses to qualify similar labels by element range was found inconsistent and confusing in the English version; parentheses were removed
 - augmentation of (work) → augmentation of work
 - catalogue (work) → catalogue work
- Parentheses cannot always be easily removed in French
 - augmentation of work → augmentation d'une œuvre
 - sequel work → œuvre ...?
 - catalogue work → œuvre catalographique?
- Parentheses retained in some instances
 - suite (œuvre)
 - catalogue (œuvre)

Issues encountered during translation

- Typos
- Inconsistencies between similar definitions
- Ambiguities in wording
- Problematic definitions. For example :
 - Definitions not adjusted for elements that had become relationship elements. Example:
 - **coordinates of cartographic content** (range = Place)
 - *Original definition in beta Toolkit:* A mathematical system for identifying a place covered by the cartographic content of a work.
 - *Revised definition:* **A place** that is the area of coverage of a cartographic work that is described using a mathematical system to identify its boundaries or location.

Problem with “issue”

- Does *issuing* cover only publication? What is the distinction between *publication*, *release* and *issuance*?
 - Scope note for *name of publisher*: Publication includes release and issuance.
Google translation of note (July 2019): La publication inclut la publication et la publication (!!).
- issuing body agent, issuing body collective agent, issuing body corporate body, etc.
 - *Issuing body* used to refer only to a corporate body under AACR2. How to translate *issuing body* when the term applies to all types of agents? Could *body* be omitted?

Next steps

RDA Reference

- Value vocabularies
- Element sets

Translation Table

Boilerplate file

Toolkit instructions

- Entity chapters
- Guidance chapters
- Related resources

User interface

Examples

Help

Expected date of completion :
May 31, 2021

To learn more about the original French translation project:

Clément Arsenault, Daniel Paradis & Pat Riva (2014)
Translating RDA into French, *Cataloging & Classification Quarterly*, 52:6-7, 704-722, DOI:
[10.1080/01639374.2014.889059](https://doi.org/10.1080/01639374.2014.889059)



Questions?

RDA Toolkit Update

August 3, 2020

James Hennelly
Director, RDA Toolkit

jhennelly@ala.org

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Next Release to Beta Site

- Scheduled for September 16th
- Will include...
 - Partial translations in Finnish and Norwegian
 - Functionality for setting language preference and switching between language versions
 - Improvements to contributed documents, particularly the subscribe functions
 - Additional policy statements from LC-PCC and British Library
 - Restructuring of the Resources tab
- Final Beta Release

December Switchover

- Will focus on the switchover with minimal development or editorial work
- Beta site will become access.rdatoolkit.org
- [Beta.rdatoolkit.org](https://beta.rdatoolkit.org) will go away
- Original RDA Toolkit will move to new address and remain accessible to all
- Aiming to not to break any links and preserve profile-related content (setting, bookmarks etc.)

Feedback

We still want it.

James Hennelly

jhennelly@ala.org

rdatoolkit@ala.org

RDA Conformance in a Complex Environment

Stephen Hearn (University of Minnesota)
ALA representative to NARDAC

RDA Conformance

- RSC discussion paper, May 2020
- Discusses degrees of metadata conformance with RDA
- Proposed replacement for “Data Elements” Guidance chapter
- <http://www.rda-rsc.org/sites/all/files/RDA%20conformance%20proposal.pdf>

Indirect and partial conformance

- Indirect conformance = conformance with RDA entities or elements at a narrower level
- Partial conformance = RDA description set + non-RDA metadata in one package
- Unconstrained element set in RDA Registry = non-RDA metadata for use outside of RDA

Complex environment

- Cataloging works with three systems
 - Content standard (e.g., AACR2, RDA)
 - Encoding format (e.g., MARC, RDF)
 - Automated system (e.g., OCLC, Alma)
- Not fully congruent or compatible
- Indirect and partial conformance with RDA will be widely practiced

Closed vs Open World

- Do RDA entity classes and element constraints result in a closed world?
- Linked data prefers identifiers
- RDA requires RDA entities, but not RDA entity descriptions
- RDA recognizes the potential for equivalent or compatible element semantics
- RDA accepts partial conformance

Catalogers make it all work

- Cataloging is a practical activity
- Catalogers work to ensure that:
 - Metadata responds to user needs
 - Metadata can be communicated and shared
 - The strengths of standards, formats, and systems can be leveraged together
- RDA conformance is advantageous, but it's not the only semantic game we play



Questions?

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3R is Almost Done – What's Next?

Kathy Glennan

Chair, RDA Steering Committee

Head, Original & Special Collections Cataloging
University of Maryland Libraries



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3R Project – Final Milestones

- September RDA Toolkit release
 - More policy statement examples from LC and the British Library
 - Partial translations published in Finnish and Norwegian
 - Mapping of RDA elements to LRM elements
- Switchover date: **December 15, 2020**
 - Beta Toolkit ceases being beta and becomes the authorized version of RDA
 - New URL: access.rdatoolkit.org
 - Original Toolkit still available
 - New URL: original.rdatoolkit.org
 - No date set yet for retiring the original Toolkit
 - You will have at least a one-year notification

Timeframe for Implementation

DON'T PANIC

Timeframe for Implementation

- Up to communities, based on
 - Availability of their own application profiles, policy statements, best practices, etc.
 - Completion of local training initiatives
 - Possibly: implementation of additional RDA-related content designation in MARC 21, BIBFRAME, or other encoding standard
- There may be a coordinated implementation date among some national libraries world-wide
 - This happened with the original RDA

A Few Things to Remember

- RDA was never designed to meet all your metadata needs
 - Administrative metadata, resource management metadata, and rights management metadata are all out of scope of RDA
 - As is subject access, unless it's for an RDA entity
 - RDA can point out to other standards with *related entity of RDA entity* or something more specific (e.g., *related entity of [agent, place, work, etc.]*) as attributes of an RDA entity
- “Core elements” not part of beta RDA
 - Required elements are quite minimal at the RDA (or international) level
 - More specific guidance/requirements expected in application profiles, policy statements, and/or best practices

A Few Things to Remember

***Just because an element is defined in RDA
does not mean catalogers have to use it***

What does RDA Require?

- Coherent description of an information resource
 - [Required] A description of at least one of its entities
 - [Recommended] Relationships between WEMI entities for the information resource, using specific relationship elements with the appropriate cardinality, such as the following (full list at 07.04.34.92):
 - *expression manifested* [minimum = 1; maximum not specified]
 - *manifestation of work* [minimum number = 1; maximum not specified]
 - This relationship implies the existence of at least one expression
- Description of a WEMI entity
 - [Required] An appellation element (appellation, title/preferred title, access point/authorized access point, identifier, or IRI)
 - [Recommended] Other elements to support LRM user tasks

What Will Communities Require?

- Cataloging communities will determine for themselves
 - Choices in granularity (e.g., *agent* vs. a more specific entity like *person*)
 - Recording method(s) for a given element
 - unstructured, structured, identifier, IRI
 - Which additional elements are required, and which of these are repeatable (beyond what is already in RDA)
 - Which elements will not be used

What's Next for the RSC?

- October 2020 meeting changed from in-person to virtual
 - Expanded from one week to two weeks
 - Will be a mix of synchronous and asynchronous meeting styles
 - Will hold 4 two-hour synchronous meetings at different times to accommodate the different time zones of RSC members
 - Investigating how to accommodate observers
 - Agenda items may cross over between both meeting styles
 - Papers, reports, etc. to be posted on the RSC website no later than three weeks before the meeting
- 4 meetings planned for 2021
 - 3 asynchronous (January, April, July)
 - 1 in person – in New Zealand

RDA Development Goals 2020-2021

- Continued collaboration with MARC/RDA Working Group
 - More proposals and discussion papers related to new RDA elements expected for MARC Advisory Committee meeting in January 2021
- Receive and act on initial recommendations from RSC's Application Profiles Working Group
- Consider proposals from RDA communities as they arise
 - Currently under development by NARDAC
 - curator agent of work/curator agent of work of
- Support for new RSC member to represent Latin America and the Caribbean (anticipated no later than 2021)

RDA Development Goals 2020-2021

- Ongoing review and update of RDA to reduce, and ultimately eliminate, Western focus
 - Current work on developing community-based string encoding schemes is part of this effort
- Continued development of and support for “community resources” in the Toolkit
 - Including identifying what constitutes a “community” and what their relationship is with the RSC
- Create a self-service checklist of conformance conditions
- Respond to user feedback

More Information – all free!

- RSC website: <http://rda-rsc.org/>
 - RSC news and announcements: <http://rda-rsc.org/news>
 - RSC documents (2020): <http://rda-rsc.org/node/633>
(RSC papers, agendas, minutes, working group charges, etc.)
 - RSC presentations (2020): <http://www.rda-rsc.org/node/634>
- RDA Toolkit site: <https://www.rdatoolkit.org/>
 - Toolkit news: <https://www.rdatoolkit.org/news>
- RDA Toolkit YouTube channel
 - <https://www.youtube.com/c/RDAToolkitVideo>
(contains instructional videos on how to use the RDA Toolkit and recordings of RDA-related presentations)
- Email me: RSCChair@rdatoolkit.org



Questions??

R | D | A
Resource Description & Access

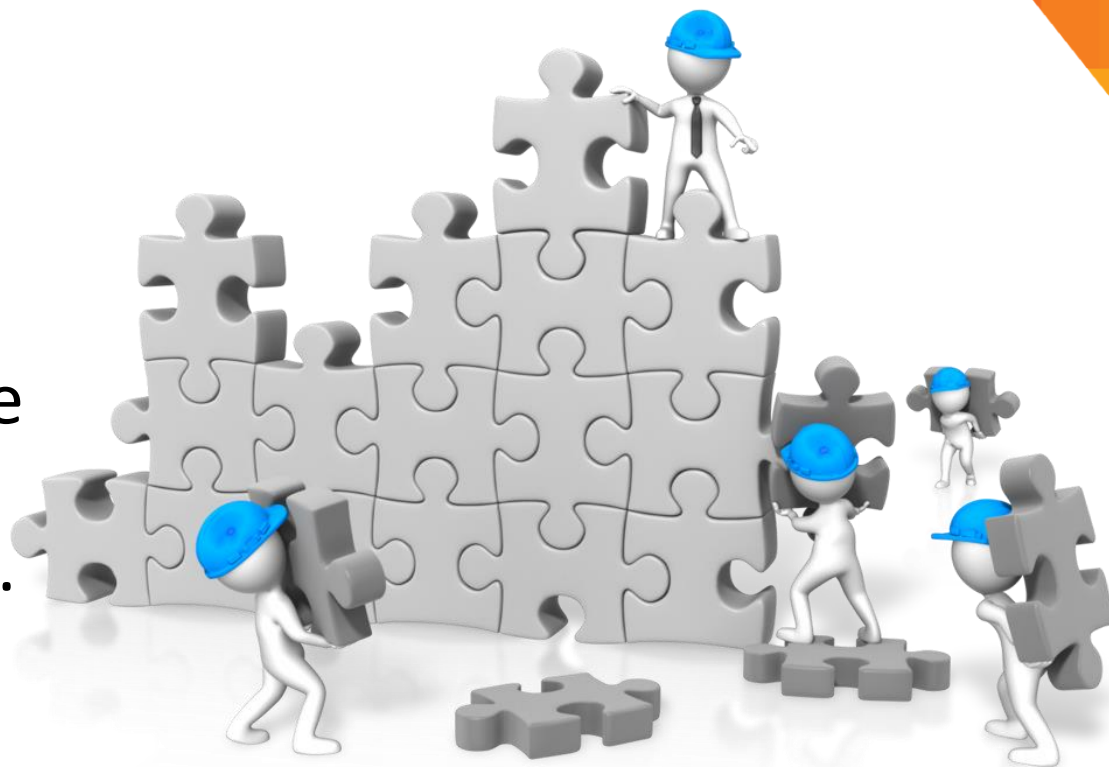


<https://www.clipart.email/download/6298794.html>

R | D | A
Resource Description & Access

Remember

There are still pieces that need to fall into place before we can use the beta RDA Toolkit to catalog.



<https://www.pngegg.com/en/png-ztupu>

R | D | A
Resource Description & Access

Remember

Switch over date



**North American
Implementation date(s)**



What you can do to prepare for Implementation Day

- Look at the free resources listed in Kathy's presentation
- “Play” with the beta Toolkit
- Stay tuned for announcements from the RSC, LAC, LC, and other North American RDA specialized communities
- Be on the lookout for training opportunities; volunteer in training initiatives
- Be open-minded...

What you can do to prepare for Implementation Day



Thanks

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- Dan Freeman

Presenters:

- Thomas Brenndorfer
- James Hennelly
- Melanie Polutta
- Stephen Hearn
- Thi Bao Tran Phan
- Kathy Glennan
- Daniel Paradis

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R | D | A
Resource Description & Access