NARDAC RDA Update Forum

March 29, 2021

RDA and Community Resources

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March 29, 2021

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

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  - Introduction
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  - 3: Cartographic Materials
  - 4: Manuscripts (Including Manuscript Collections)
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  - A: Capitalization
  - B: Abbreviations
  - C: Numerals
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A trip down memory lane …

AACR2 Appendices

- Appendices
  - + **A:** Capitalization
  - + **B:** Abbreviations and Symbols
  - + **C:** Initial Articles
  - + **D:** Record Syntaxes for Descriptive Data
  - + **E:** Record Syntaxes for Access Point Control
  - + **F:** Additional Instructions on Names of Persons
  - + **G:** Titles of Nobility, Terms of Rank, Etc.
  - + **H:** Dates in the Christian Calendar

Original RDA Toolkit

- Appendices
  - **A:** Capitalization
    - **A.0** Scope
    - **A.1** General Guideline
    - + **A.2** Names of Agents and Places
    - + **A.3** Title of Work
    - + **A.4** Titles of Manifestations
    - **A.5** Edition Statement
    - **A.6** Numbering of Serials
    - **A.7** Numbering within Series and Subseries
    - **A.8** Notes
    - **A.9** Details of Elements
    - **A.10** General Guideline for English Language Capitalization
    - + **A.11** Personal Names
    - **A.12** Names of Peoples, Etc.
    - + **A.13** Place Names
    - **A.14** Names of Structures, Streets, Etc.
    - **A.15** Derivatives of Proper Names
    - + **A.16** Names of Corporate Bodies
    - + **A.17** Religious Names and Terms
    - **A.18** Names of Documents
    - **A.19** Names of Historical and Cultural Events and Periods
    - **A.20** Decorations, Medals, Etc.
    - **A.21** Names of Calendar Divisions
    - **A.22** Names of Holidays
    - **A.23** Scientific Names of Plants and Animals
    - **A.24** Geologic Terms
    - **A.25** Astronomical Terms
    - **A.26** Soil Names
    - **A.27** Trade Names
    - **A.28** Single and Multiple Letters Used as Words or Parts of Compounds
    - **A.29** Hyphenated Compounds
    - **A.30** Hyphenated Prefixes
    - **A.31** General Guideline on Capitalization for Languages Other Than English
    - **A.32** Capitalization of Transliterated Names and Titles
    - + **A.33** Bosnian
    - + **A.34** Bulgarian

Original RDA Toolkit: Capitalization, Abbreviations, and Symbols …

… <u>English language conventions dominate</u>

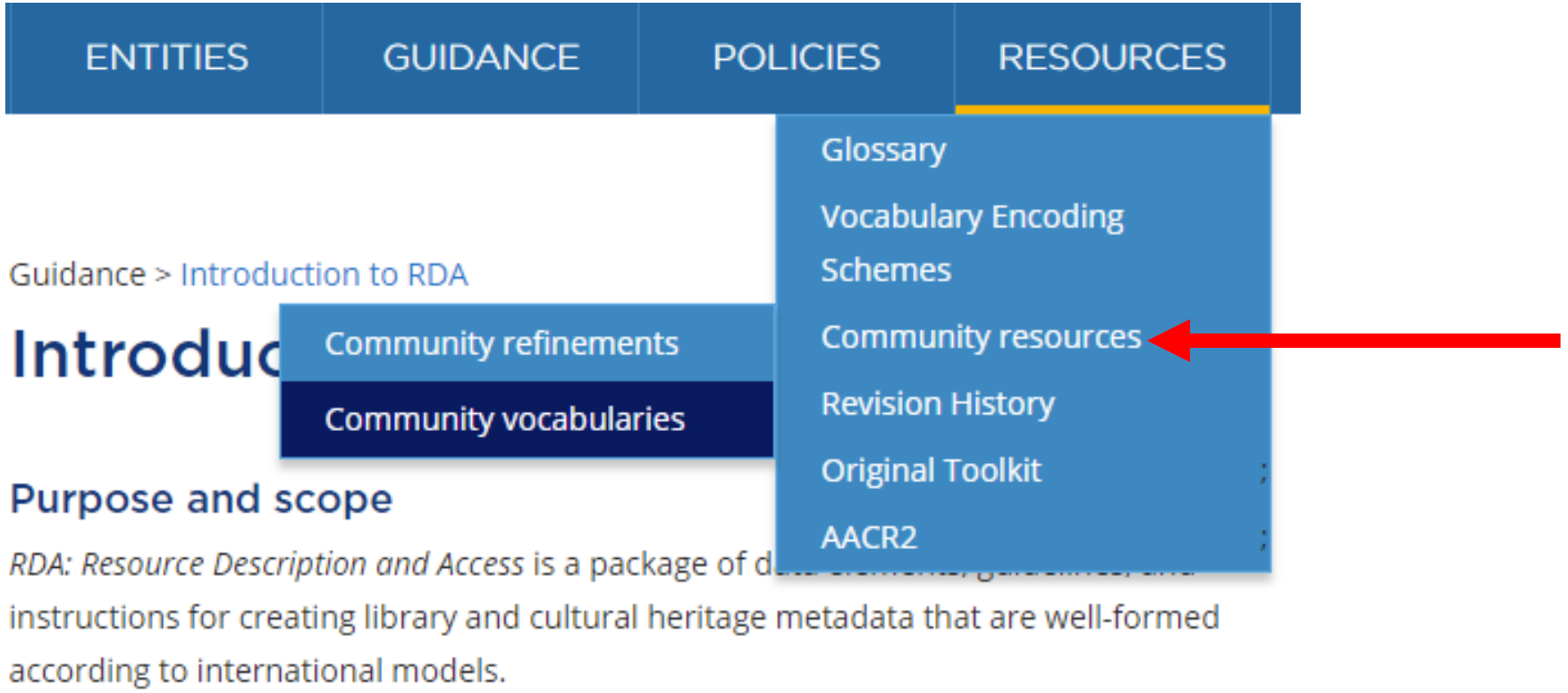
- **B:** Abbreviations and Symbols
  - **B.0** Scope
  - **B.1** General Guideline
  - **B.2** Names of Agents and Places
  - **B.3** Title of Work
  - **B.4** Transcribed Elements
  - **B.5** Other Elements
    - **B.5.1** Dimensions
    - **B.5.2** Extent of Storage Space
    - **B.5.3** Duration
    - **B.5.4** Numeric Designation of Musical Work
    - **B.5.5** Numbering of Part
    - **B.5.6** Medium of Performance of Musical Content
    - **B.5.7** Additional Scale Information
    - **B.5.8** Right Ascension
    - **B.5.9** Date
    - **B.5.10** Other Distinguishing Characteristic of a Legal Work
    - **B.5.11** Other Elements
  - **B.6** Corresponding Words in Another Language
  - **B.7** Latin Alphabet Abbreviations
  - **B.8** Cyrillic Alphabet Abbreviations
  - **B.9** Greek Alphabet Abbreviations
  - **B.10** Hebrew and Yiddish Abbreviations
  - **B.11** Names of Certain Countries, States, Provinces, Territories, Etc.

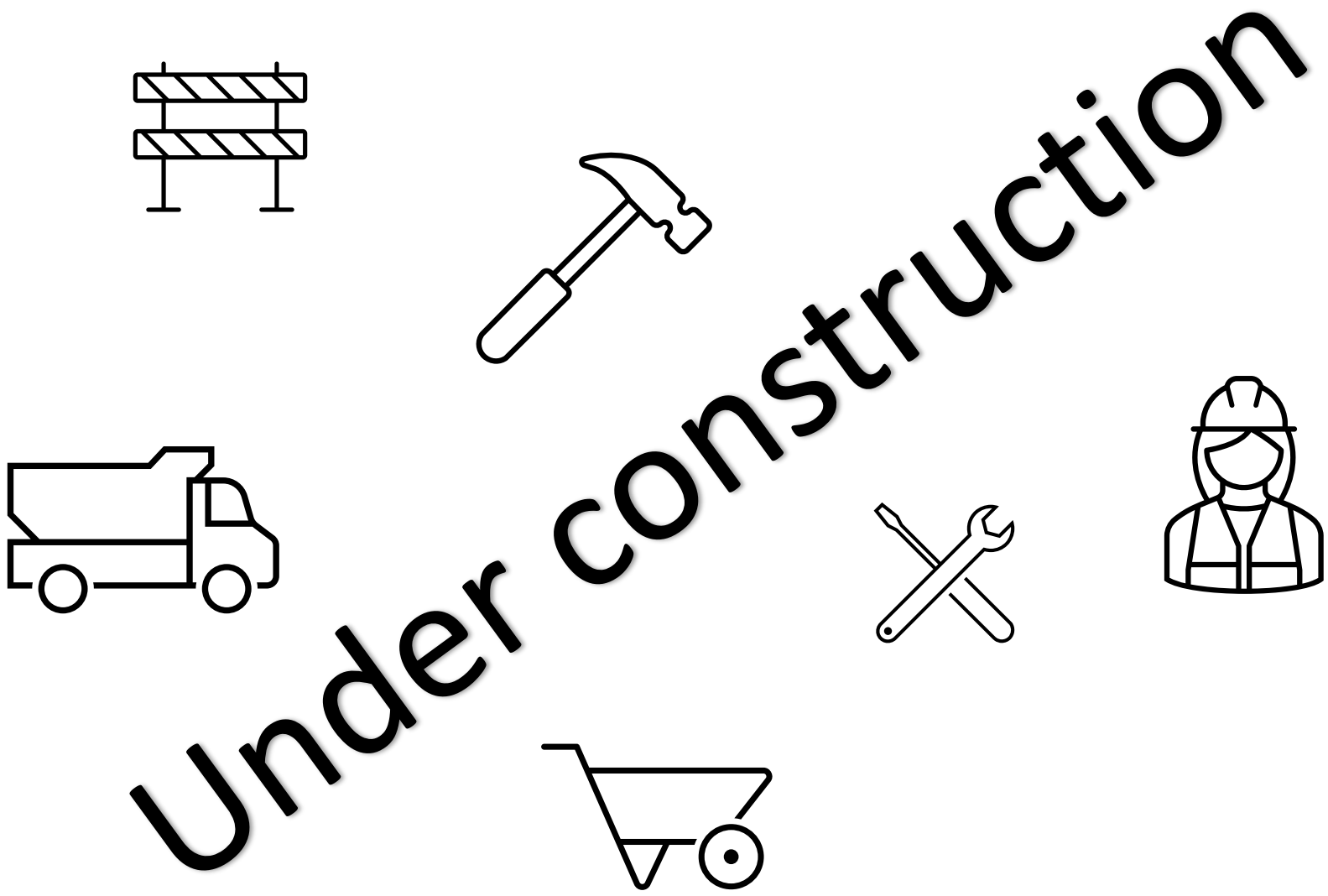
Followed by other languages …

- **F: Additional Instructions on Names of Persons**
  - **F.0** Scope
  - + **F.1** Names in the Arabic Alphabet
  - + **F.2** Burmese and Karen Names
  - + **F.3** Chinese Names Containing a Non-Chinese Given Name
  - + **F.4** Icelandic Names
  - + **F.5** Indic Names
  - + **F.6** Indonesian Names
  - + **F.7** Malay Names
  - + **F.8** Roman Names
  - + **F.9** Romanian Names Containing a Patronymic
  - + **F.10** Thai Names
  - + **F.11** Recording Surnames That Include an Article and/or Preposition

- **A:** Capitalization
  - + **A.33** Bosnian
  - + **A.34** Bulgarian
  - + **A.35** Croatian
  - + **A.36** Czech (Bohemian)
  - **A.37** Danish
  - + **A.38** Dutch
  - + **A.39** Finnish
  - + **A.40** French
  - + **A.41** German
  - + **A.42** Hungarian
  - + **A.43** Italian
  - **A.44** Latin
  - **A.45** Norwegian
  - + **A.46** Polish
  - + **A.47** Portuguese
  - + **A.48** Russian
  - + **A.49** Scandinavian Languages
  - + **A.50** Serbian
  - **A.51** Slovak
  - + **A.52** Slovenian
  - + **A.53** Spanish
  - **A.54** Swedish
  - **A.55** Ukrainian

New RDA Toolkit – under the RESOURCES tab




Under construction

Resources > Community resources

Community resources

This area of RDA toolkit contains content that is not appropriate for incorporation with the main guidance and instructions.

There are several reasons for this:

- The utility of the content is restricted by local bibliographic and cultural conventions.
- The potential scale of the content may impair the functionality of the Toolkit.

Community resources is subarranged into two areas:

- Community refinements provides additional guidance and instructions for existing RDA elements that are applicable to specific communities
- Community vocabularies provides controlled terms for use as values of specific RDA elements using specialized community-based vocabularies or language-based vocabularies.

Resources > Community resources

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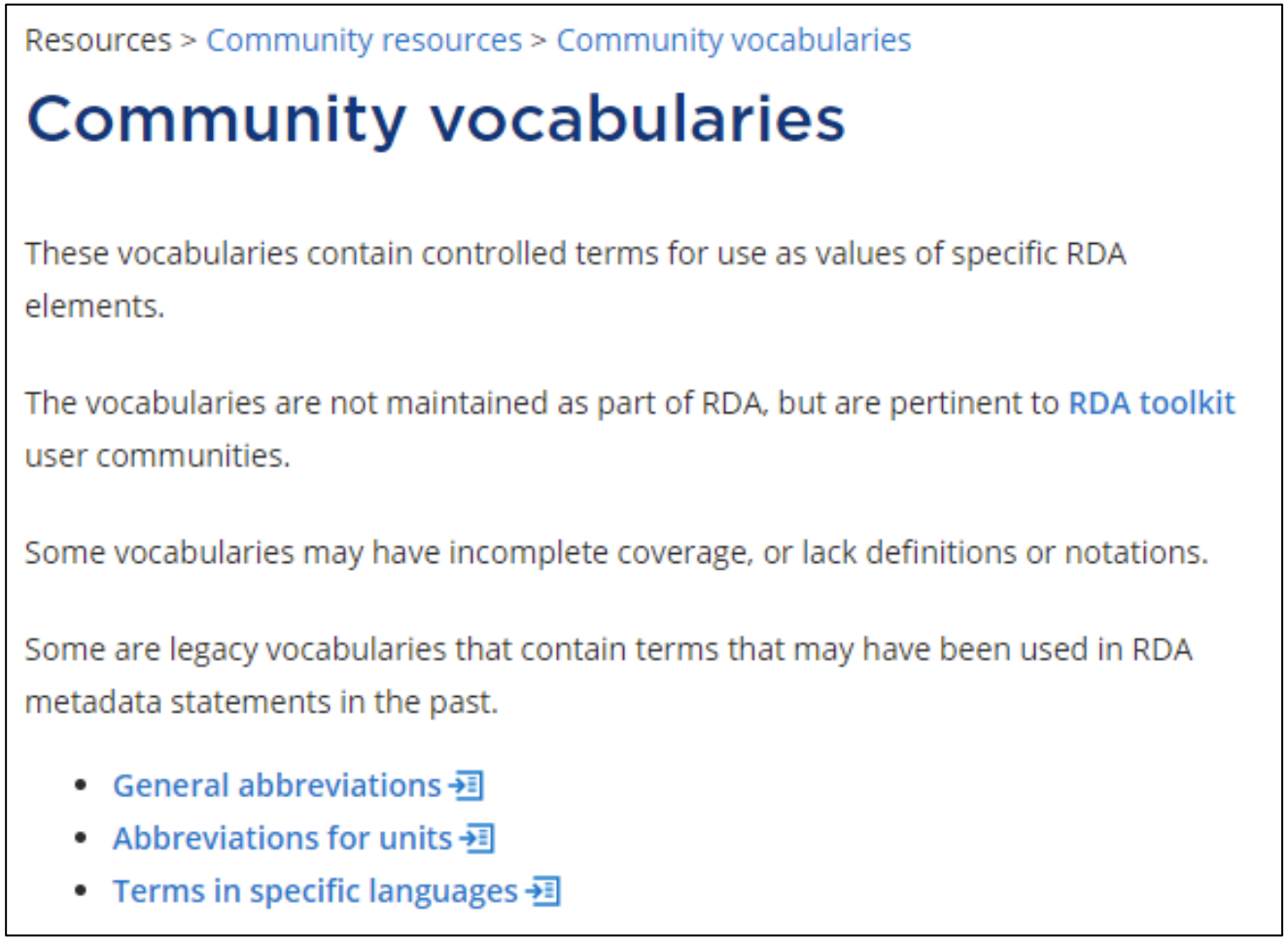
Landing page for *Community vocabularies*



Resources > Community resources > Community vocabularies

Community vocabularies

These vocabularies contain controlled terms for use as values of specific RDA elements.

The vocabularies are not maintained as part of RDA, but are pertinent to RDA toolkit user communities.

Some vocabularies may have incomplete coverage, or lack definitions or notations.

Some are legacy vocabularies that contain terms that may have been used in RDA metadata statements in the past.

- General abbreviations
- Abbreviations for units
- Terms in specific languages

General abbreviations

Use the following abbreviations in normalized transcription or when constructing an access point or other *structured description*.

Term	Abbreviation
alto	*A*
Anno Domini	*A.D.*
baritone	*Bar*
bass	*B*
Before Christ	*B.C.*
et cetera	*etc.*
mezzo-soprano	*Mz*
opus	*op.*
soprano	*S*
tenor	*T*

For abbreviations of units of measurement and time, see Abbreviations for units.

It’s all about “strings”…

Terms in specific languages

Apply the following guidance when recording a transcription for an *unstructured description* in a specific language or constructing an access point or other *structured description* by applying a *string encoding scheme* to words and phrases in the language.

Unstructured – in context of transcription guidelines

Structured – in context of *string encoding schemes*

Terms in specific languages

- Terms in Afrikaans
- Terms in Albanian
- Terms in Arabic
- Terms in Baluchi
- Terms in Basque
- Terms in Bosnian
- Terms in Brahui
- Terms in Breton
- Terms in Bulgarian
- Terms in Burmese
- Terms in Catalan
- Terms in Chinese
- Terms in Croatian
- Terms in Czech
- Terms in Danish
- Terms in Dutch
- Terms in English
- Terms in Esperanto
- Terms in Fijian
- Terms in Finnish
- Terms in French
- Terms in Galician
- Terms in German
- Terms in Greek
  - Terms in Ancient Greek
  - Terms in Modern Greek
- Terms in Hawaiian
- Terms in Hebrew
- Terms in Hungarian
- Terms in Iban
- Terms in Icelandic
- Terms in Indonesian
- Terms in Irish
- Terms in Italian
- Terms in Malagasy
- Terms in Malay
- Terms in Maltese
- Terms in Maori
- Terms in Neapolitan
- Terms in Niuean
- Terms in Norwegian
- Terms in Occitan
- Terms in Old Provençal
- Terms in Panjabi
- Terms in Persian
- Terms in Polish
- Terms in Portuguese
- Terms in Rarotongan
- Terms in Romanian
- Terms in Russian
- Terms in Samoan
- Terms in Scots
  - Terms in Shetland dialect
- Terms in Scottish Gaelic
- Terms in Serbian
- Terms in Slovak
- Terms in Slovenian
- Terms in Spanish
- Terms in Swedish
- Terms in Tagalog
- Terms in Tahitian
- Terms in Thai
- Terms in Tokelau
- Terms in Tongan
- Terms in Turkish
- Terms in Ukrainian
- Terms in Urdu
- Terms in Walloon
- Terms in Welsh
- Terms in Western Frisian
- Terms in Western Panjabi
- Terms in Yiddish

The process of organizing the community vocabularies for the new RDA Toolkit…

	Language or script	Abbreviations	Capitalization	Initial article	Name of person	Terms of rank
Arabic	Script			Yes	Yes	
Hungarian	Language		Yes	Yes		
Iban	Language					Yes
Italian	Language		Yes	Yes		
Latin script	Script	Yes				
Romanian	Language			Yes	Yes	

Terms in English

Table of Contents

- RDA Entity
  - Names of RDA entities
- Work
  - Preferred titles of works
  - Titles of works
- Expression
  - Medium of performance of musical content
- Manifestation
  - Manifestation statements
  - Titles of manifestations
- Person
  - Access points for persons
  - Gender
  - Names of persons
- Corporate Body
  - Names of corporate bodies
- Place
  - Names of places
- Timespan
  - Names of timespans

Terms in English – organized by RDA entity, and then by element

Terms in English

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  - Names of corporate bodies
- Place
  - Names of places
- Timespan
  - Names of timespans

Names of RDA entities

Apply the following guidance when recording a value of RDA Entity: name of RDA entity or *element subtype*.

Initial articles of names of RDA entities in English

Treat the following words and prefixes as initial articles.

- *a*
- *an*
- *d'*
- *de*
- *the*
- *ye*

Terms in English

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  - Names of corporate bodies
- Place
  - Names of places
- Timespan
  - Names of timespans

Community vocabularies for *preferred titles of works*

Preferred titles of works

Apply the following guidance when recording a value of Work: preferred title of work or *element subtype*.

Terms for collective titles in English

Use the terms from Terms for collective titles in English.

Preferred titles of books of the Bible in English

Use the terms from Terms for Books of the Bible in English.

Terms for collective titles in English

These conventional collective titles are intended for use as values of Work: preferred title of work.

OPTION

Record an appropriate term from the following list:

- *correspondence*
- *essays*
- *librettos*
- *lyrics*
- *novels*
- *plays*
- *poems*
- *prose works*
- *short stories*
- *speeches*

From AACR2 to the new RDA Toolkit

AACR2 – Appendix A for Capitalization [English language context]

A.28 SOIL NAMES

A.28A. Capitalize the name of a soil classification.

Alpine Meadow
Chernozem
Half Bog
Prairie

New RDA Toolkit – Capitalization of manifestation statements in English [language: *English*; entity: *Manifestation*]

Capitalize a name of a soil classification.

Terms in French

Table of Contents

- RDA Entity
  - Names of RDA entities
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- Manifestation
  - Access points for manifestations
  - Manifestation statements
  - Titles of manifestations
- Person
  - Access points for persons
  - Names of persons
  - Terms of rank
- Corporate Body
  - Names of corporate bodies
- Place
  - Names of places
- Timespan
  - Names of timespans

Terms in French, organized by entities:

- RDA Entity
- Resource entities (WEMI)
- Agent entities
- Place
- Timespan

Terms in French

Table of Contents

- RDA Entity
  - Names of RDA entities
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  - Preferred titles of works
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  - Access points for manifestation
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  - Titles of manifestations
- Person
  - Access points for persons
  - Names of persons
  - Terms of rank
- Corporate Body
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- Place
  - Names of places
- Timespan
  - Names of timespans

Names of RDA entities

Apply the following guidance when recording a value of RDA Entity: name of RDA entity or *element subtype*.

Initial articles of names of RDA entities in French

Treat the following words and prefixes as initial articles.

- *l'*
- *la*
- *le*
- *les*
- *un**
- *une**

An asterisk (*) indicates that the same form may be used in other contexts so that care should be taken to determine the meaning before treating the word as an initial article.

Example: Icelandic names in access points

Yrsa Sigurðardóttir

F.4 Icelandic Names

F.4.1 Additional Instructions on Icelandic Names

Original Toolkit

For Icelandic names, record names in this order:

a) the first given name

b) other given names (if present)

c) the patronymic

d) the family name, in direct order.

If a phrase naming a place follows the given name(s), patronymic, or family name, treat it as an integral part of the name.

EXAMPLE

Svava Jakobsdóttir
Given name: Svava
Patronymic: Jakobsdóttir

Elín Hirst
Given name: Elín
Family name: Hirst

Bjarni Benediktsson frá Hofteigi
Given name: Bjarni
Patronymic: Benediktsson
Words denoting place: frá Hofteigi

Jóhannes úr Kötlum
Given name: Jóhannes
Words denoting place: úr Kötlum

Variant names. Record as variant names both a form using the patronymic as the first element and a form using the family name as the first element (see **9.2.3.10** RDA).

Access points for persons

Apply the following guidance when recording a value of Person: access point for person.

Record names in this order:

1. the first given name
2. other given names (if present)
3. the patronymic
4. the family name, in direct order.

CONDITION

A phrase naming a place follows the given name(s), patronymic, or family name.

OPTION

Treat the phrase as an integral part of the name.

Record variant access points that include:

- a form using the patronymic as the first element and
- a form using the family name as the first element

(see Person: variant access point for person).

New Toolkit

Terms in Icelandic

Entity: **Person**

Element: **Access point for person**

Yrsa Sigurðardóttir

Where we stand today with community resources…

For the Anglo-American catalog(u)ing community

… by the Anglo-American catalog(u)ing community

Community Resources – Further Refinements and Vocabularies

- Normalizing data found in manifestations (capitalization, etc.)
- Access point construction (string encoding schemes)
- Community vocabularies (e.g., Gender)
- Extensions to carrier and content type (see the “how-to” guidance)
- Subtypes of RDA entities and elements (including new “shortcut” relationship elements)
- Community application profiles
- Suggested friendly labels for elements

Thank you!

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

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

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

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RDA/PS project update (March 2021): LC/PCC policy statements in the Toolkit

Melanie Polutta

LC representative to NARDAC

What is the project?

Changing our documentation to work with the RDA Toolkit

Who is working on it in LC?

- Project manager: Judith Cannan, Chief of PTCP
- Project lead: Melanie Polutta (PTCP/CTPS)
- Project management resource: Ivey Glendon (PTCP/CPPS)
- Assignment manager: Clara Liao, Section Head of PTCP/CTPS
- PTCP members: Paul Frank, Manon Théroux, Veronica Ranieri, Les Hawkins (retired), Ivey Glendon, Dorie Kurtz
- SCD/MD: Damian Iseminger
- ABA: Jacque Brellenthin, Sarah Byun (through Dec 2020), Steven Folsom, Bill Robboy (through Dec 2020), Trina Soderquist, Jessica Zieman
- Outside ABA: special format catalogers that we bring in for consultation

LC-PCC PS Progress: Analyzing PSs

- 3 working spreadsheets :
  - The team analyzed 2232 original RDA LC-PCC policy statements
  - The team has written approximately 9000 new LC-PCC policy statements that are in harmony with the official RDA Toolkit terminology
  - At this stage, over 9000 new LC-PCC policy statements have been reviewed

LC-PCC PS Progress: DITA Work

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<div id="c73ad219-baa3-49c1-bc9f-41357b8398d4">
<p outputclass="title" id="e1a2427f-cf72-460b-8abc-39a82cd37ae0">
<xref outputclass="ps_link"
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</p>

<div id="12216542-1dfe-43bc-927c-060bd38c37e6">
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<ph conkeyref="b_ps_lcpcc/ph_nbp_krr_1mb"/>
</p>
<p>
<ph conkeyref="b_ps_lcpcc/ph_fw3_rfj_xlb"/>In most cases, record the title
proper in such a way that definite and indefinite articles at the beginning
of the title proper are disregarded for sorting and filing purposes.
However, do not disregard certain articles <ol>
<li>When the title proper begins with an article that appears as part of
an Person: <xref keyref="rdaaP50111"/>, Family: <xref
keyref="rdaaP50061"/>, Place: <xref keyref="rdapP70001"/>, or
Corporate Body: <xref keyref="rdaaP50032"/> and is retained in such
a name per the instructions for <xref
keyref="rdamP30134/p_kbr_yxv_dqb"/> or</li>
```

LC-PCC PS Progress: DITA Batchloading

- Melanie Polutta worked closely with LC ILS colleague and created batch processing programs (combination of XSLT, Python, and Microsoft Excel) which allow hundreds of policy statements to be bulk loaded to the official RDA Toolkit.

- By December 2020, over 6400 PSs were uploaded to ALA CMS system and published in draft form together with the official release of the Toolkit.

- For the coming official update (April 2021), all LC-PCC policy statements (approximately 10000+ PSs) will be uploaded to the Toolkit.

Handling RDA PS Feedback/Comments

- Two policy statement forms for feedback
  - In the design stage and will require LC/PCC approval

Handling RDA PS Feedback/Comments

- One form is for errors in policy statements, such as typos, grammatical issues, etc.
  - LC will not provide regular feedback on those reports.

- The other form is for proposals related to the policy statements.
  - This form with comments will be part of a larger process that includes review by an LC/PCC panel before any action is taken.

Metadata Guidance Documentation

- Work on the plan after April's update
- Can be carried out by multiple institutions
- Collaborate with PCC
- Ideally the work may start in May 2021 and be completed by November 2021

Policy statements

Now that you can look at them…

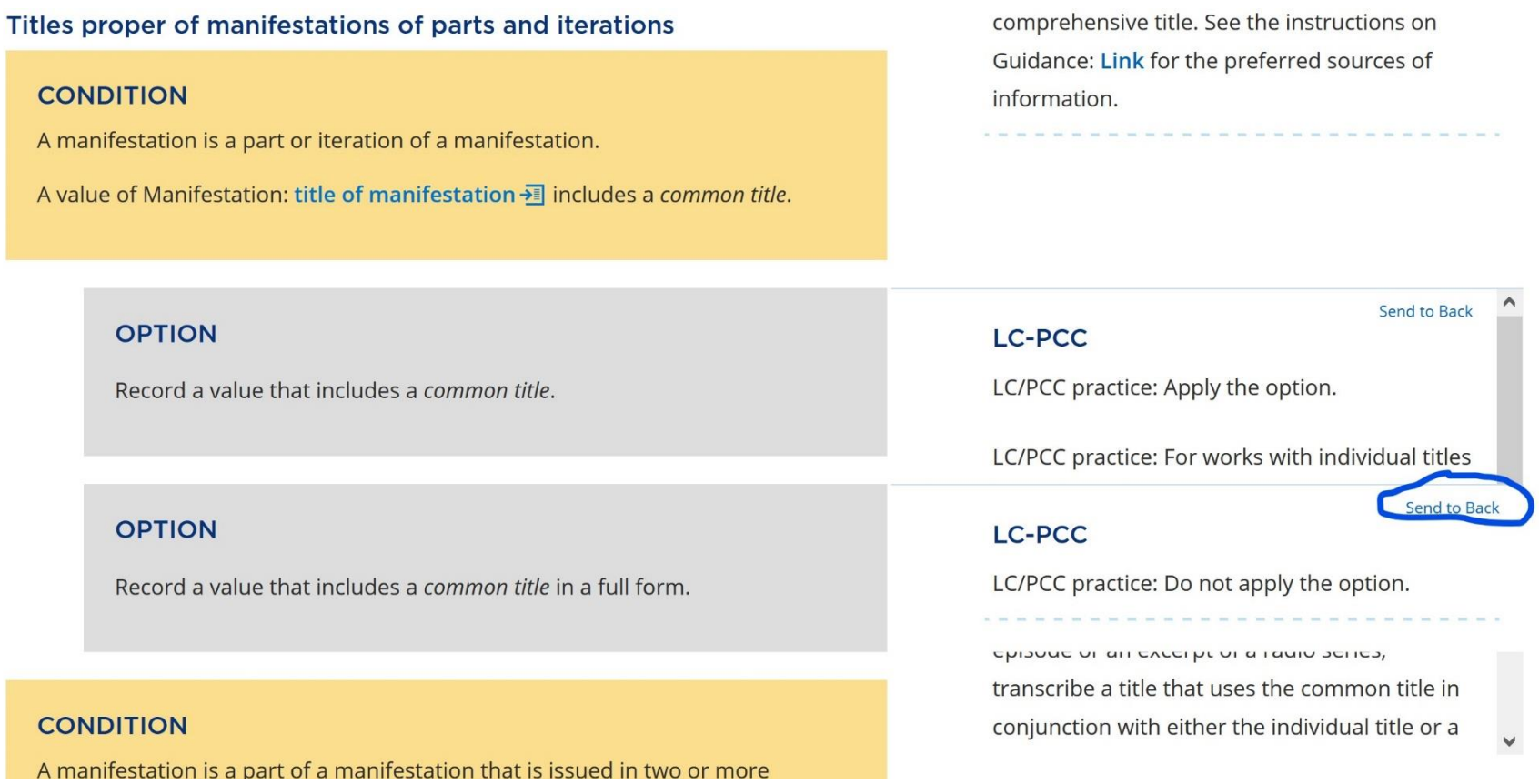
In the Toolkit

- Setting up a profile is necessary to set up a default view for policy statements
  - RDA Toolkit youtube channel: Betasite-Toolkit Training
  - https://www.youtube.com/playlist?list=PL1Gb2VwmOhgTlQdOabM-xHWtIfSVea5Z6

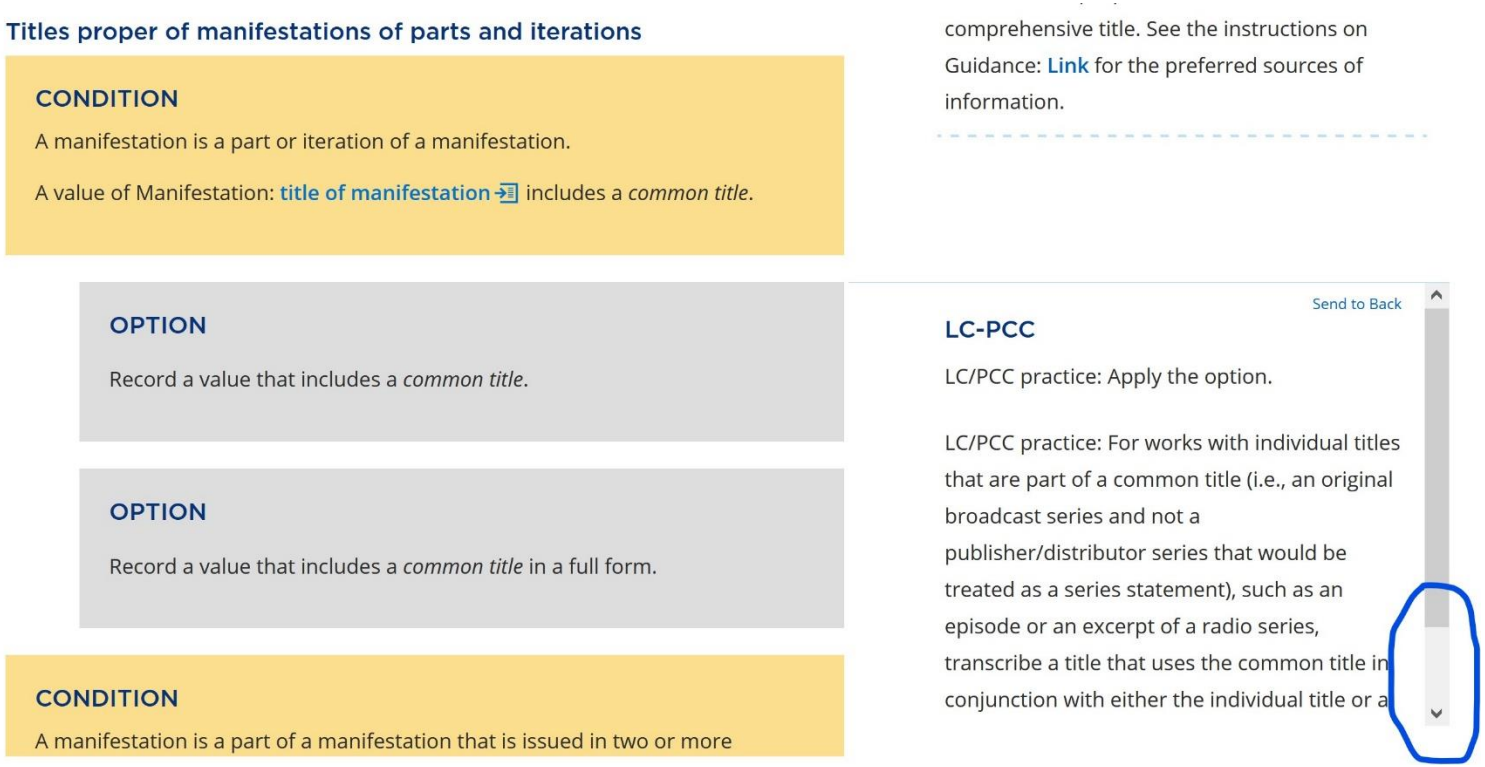
In the Toolkit

- Send to back/mirror pages
  - User display issues

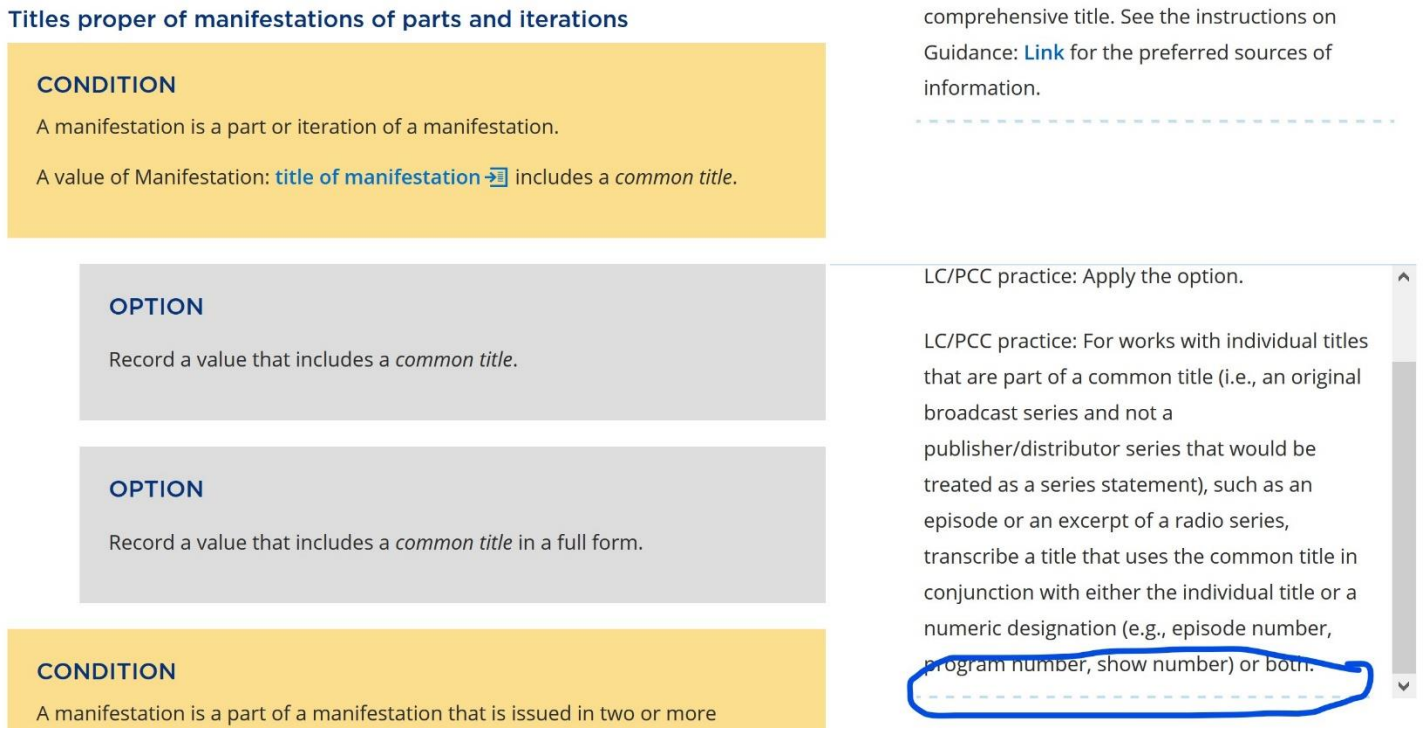
In the Toolkit



In the Toolkit



In the Toolkit



Titles proper of manifestations of parts and iterations

CONDITION

A manifestation is a part or iteration of a manifestation.

A value of Manifestation: title of manifestation includes a *common title*.

OPTION

Record a value that includes a *common title*.

OPTION

Record a value that includes a *common title* in a full form.

CONDITION

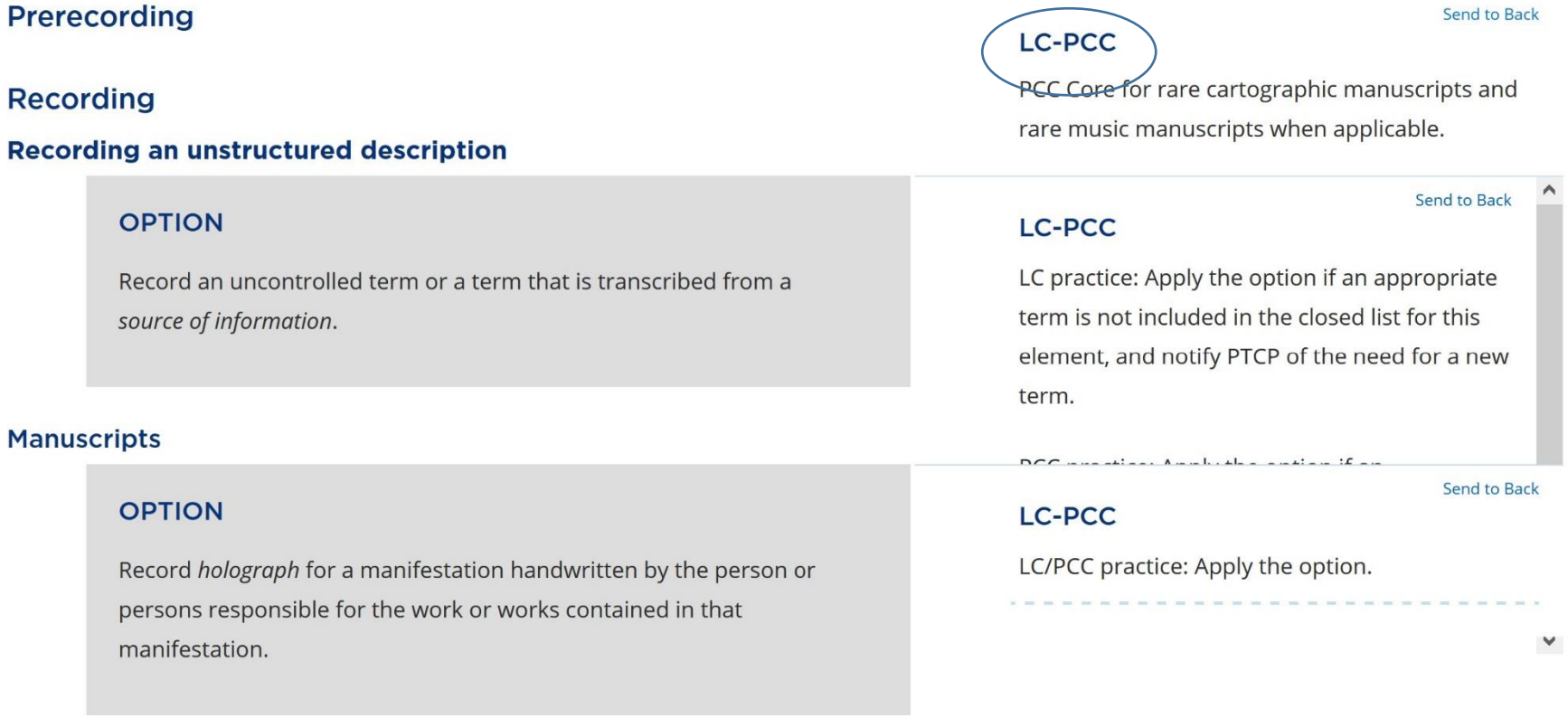
A manifestation is a part of a manifestation that is issued in two or more

comprehensive title. See the instructions on Guidance: Link for the preferred sources of information.

LC/PCC practice: Apply the option.

LC/PCC practice: For works with individual titles that are part of a common title (i.e., an original broadcast series and not a publisher/distributor series that would be treated as a series statement), such as an episode or an excerpt of a radio series, transcribe a title that uses the common title in conjunction with either the individual title or a numeric designation (e.g., episode number, program number, show number) or both.

In the Toolkit



In the Toolkit

Policies

LC-PCC policy statements for production method

Prerecording

Prerecording

PCC Core for rare cartographic manuscripts and rare music manuscripts when applicable.

LC/PCC practice: For subordinate materials (e.g., accompanying materials, kits, etc.), use cataloger's judgment when a detailed description of carrier characteristics is desired.

Recording

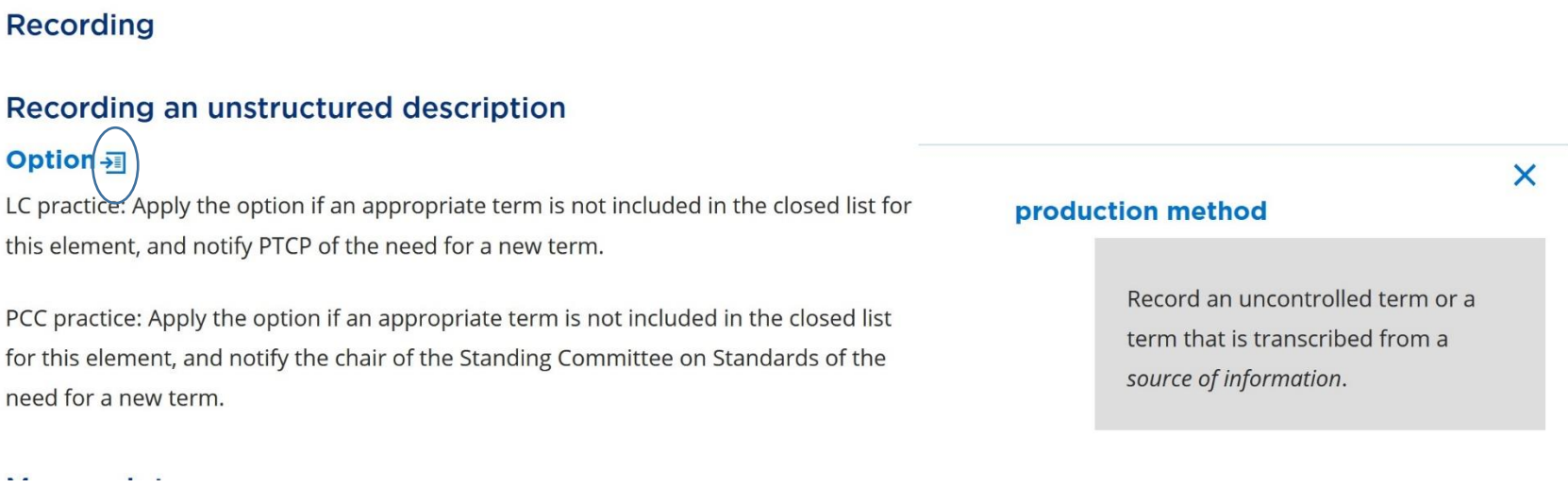
Recording an unstructured description

Option

LC practice: Apply the option if an appropriate term is not included in the closed list for this element, and notify PTCP of the need for a new term.

PCC practice: Apply the option if an appropriate term is not included in the closed list for this element, and notify the chair of the Standing Committee on Standards of the need for a new term.

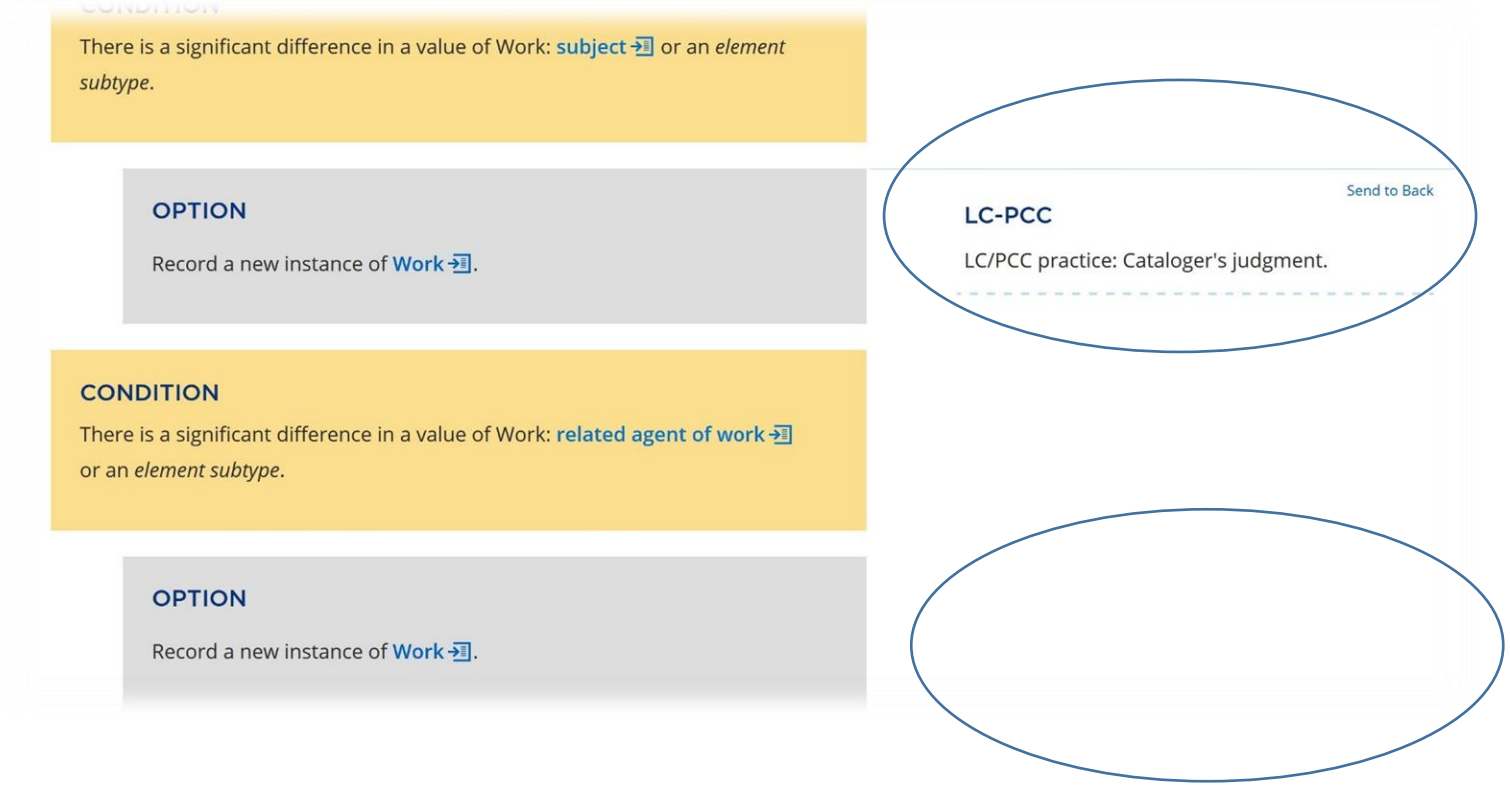
In the Toolkit



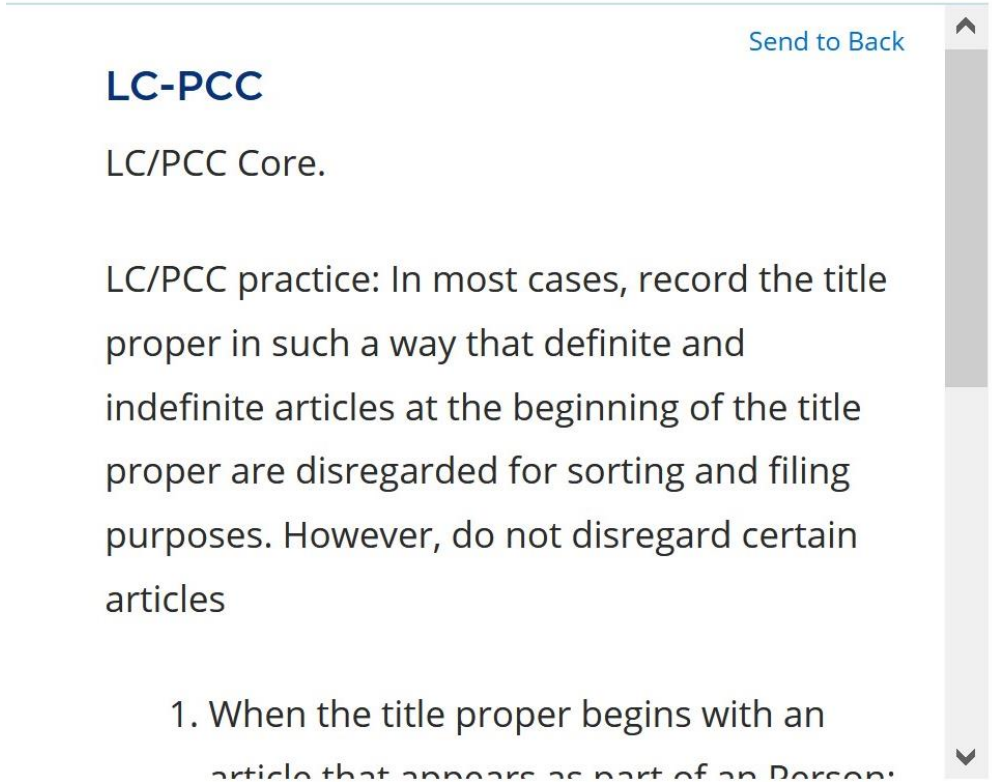
Editorial decisions

- Reality of an integrating resource
- Order of information
- Links to further information

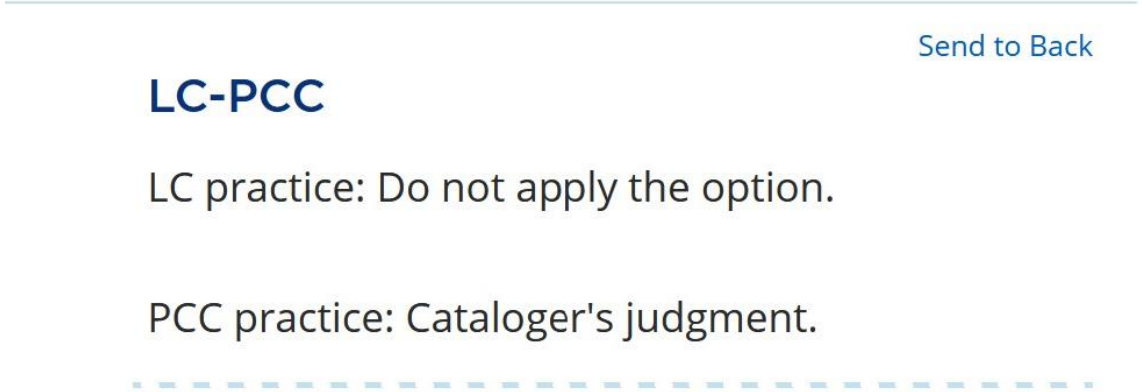
Editorial decisions: integrating



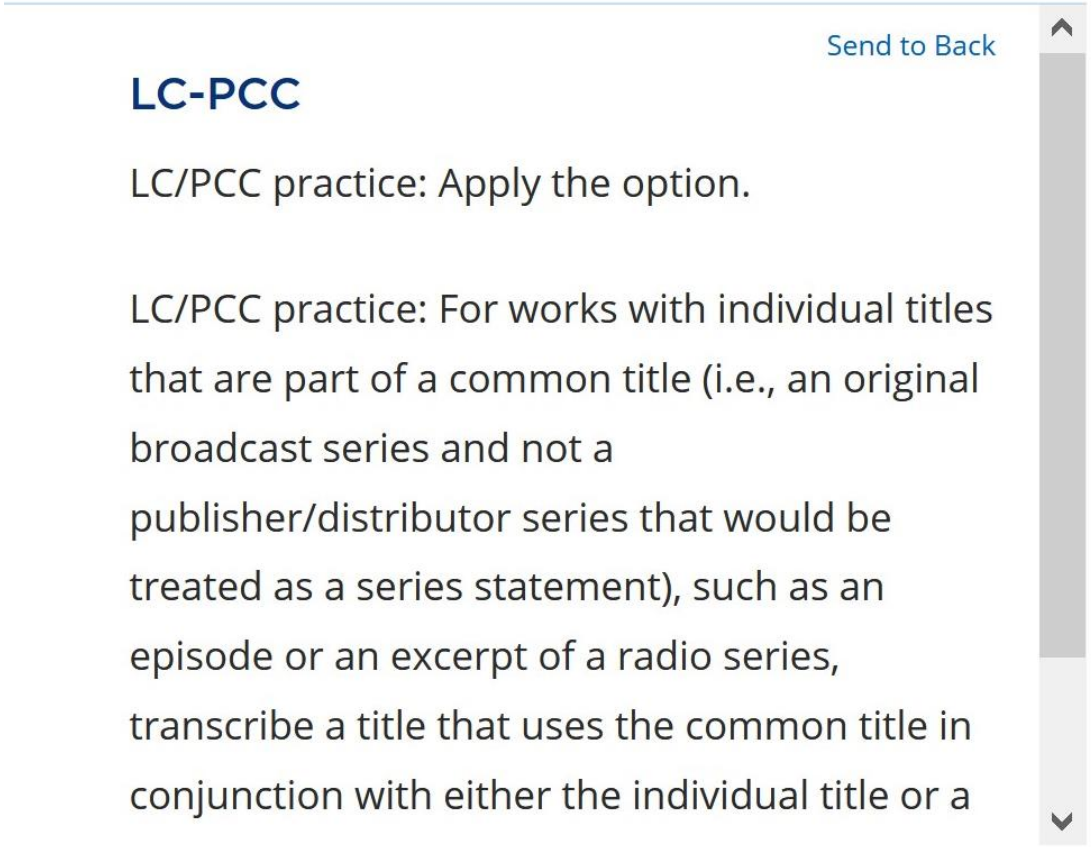
Editorial decisions: Core, practice



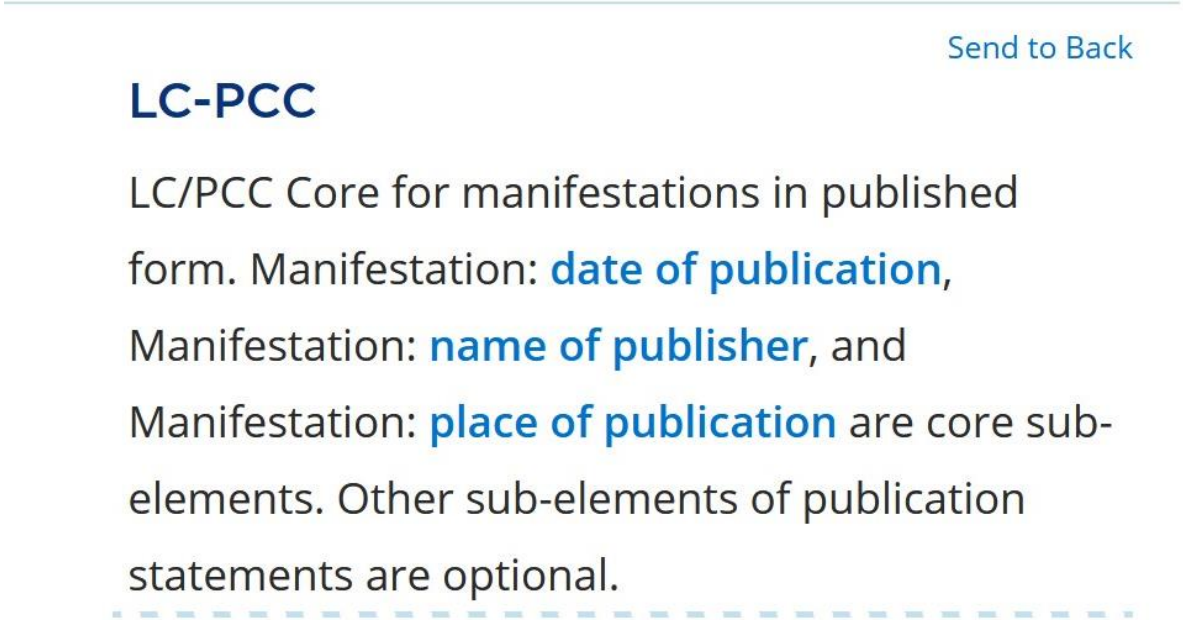
Editorial decisions: alphabetical



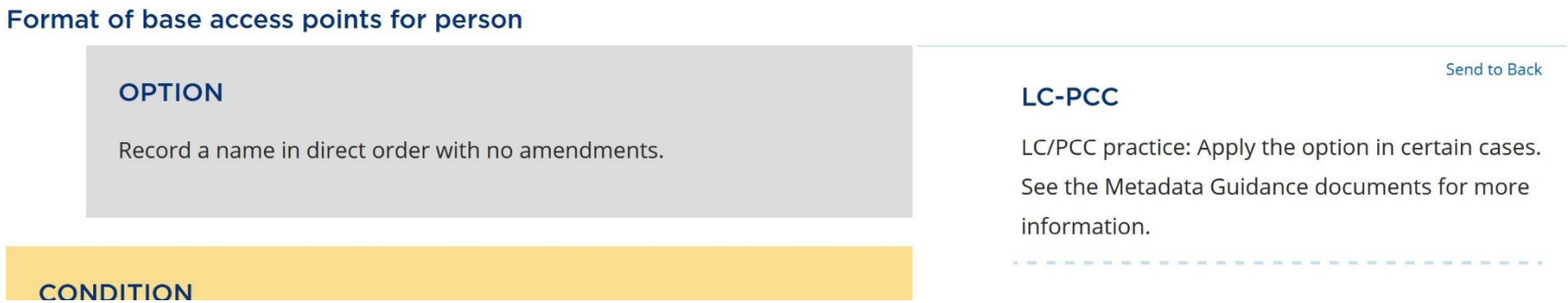
Editorial decisions: general, specific



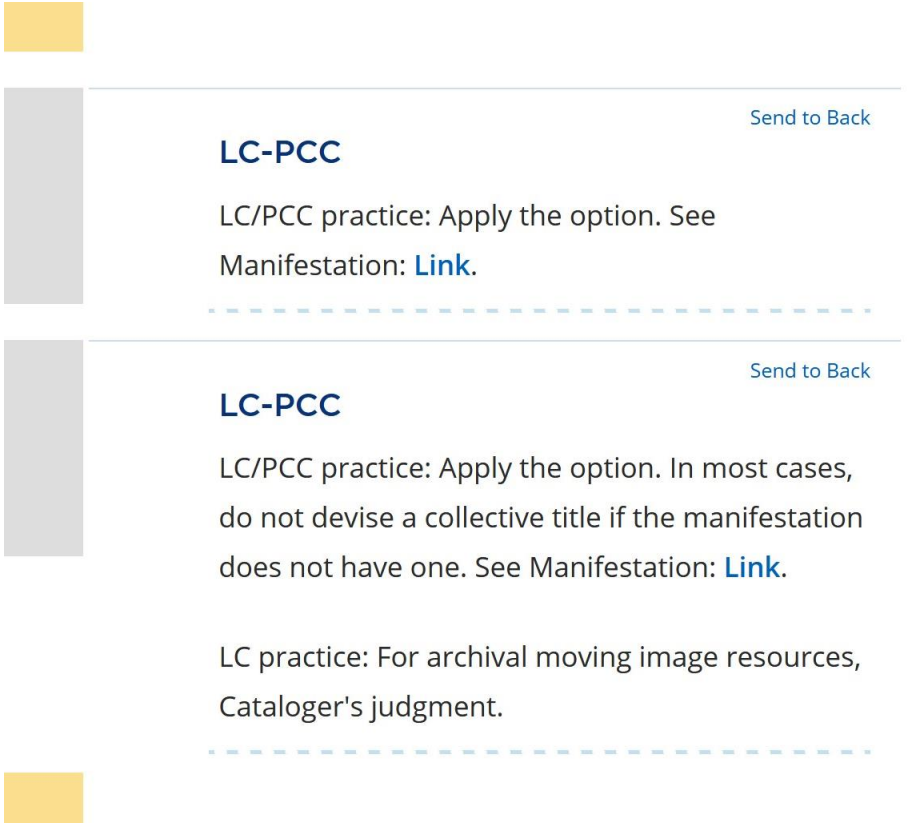
Editorial decisions: Links to elements



Editorial decisions: Links to come



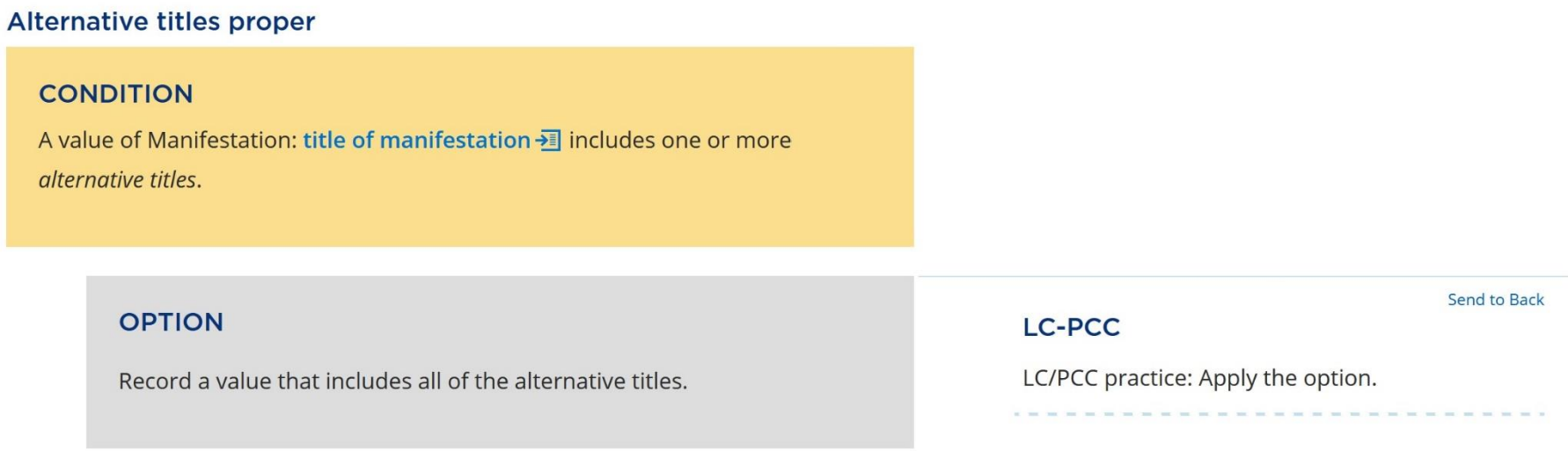
Editorial decisions: Links display



Editorial decisions

- Context of Coreness
  - Policy statements for options should be evaluated within the coreness of the element

Editorial decisions: title proper is core



Editorial decisions: date of production is not core

CONDITION

A date is represented in different calendars on a manifestation.

OPTION

Record one or more values separately in the order indicated by the sequence, layout, or typography of the *source of information*.

Send to Back

LC-PCC

LC/PCC practice: Apply the option.

Editorial decisions

- Preferring an “Situation, decision” structure for writing policy statements
- Preferring IF/THEN in place of lists

Editorial decisions: condition/decision

LC-PCC

LC/PCC practice: For earlier titles of an electronic serial, moving image resources, and if an aggregator presents a range of issues of a serial and does not retain earlier titles, apply the option.

LC/PCC practice: For serials, including rare serials, apply the option to initialisms/acronyms of the title proper. For rare serials, also apply the option to record it

Send to

Editorial decisions: IF/THEN in place of lists

Send to Back

LC-PCC

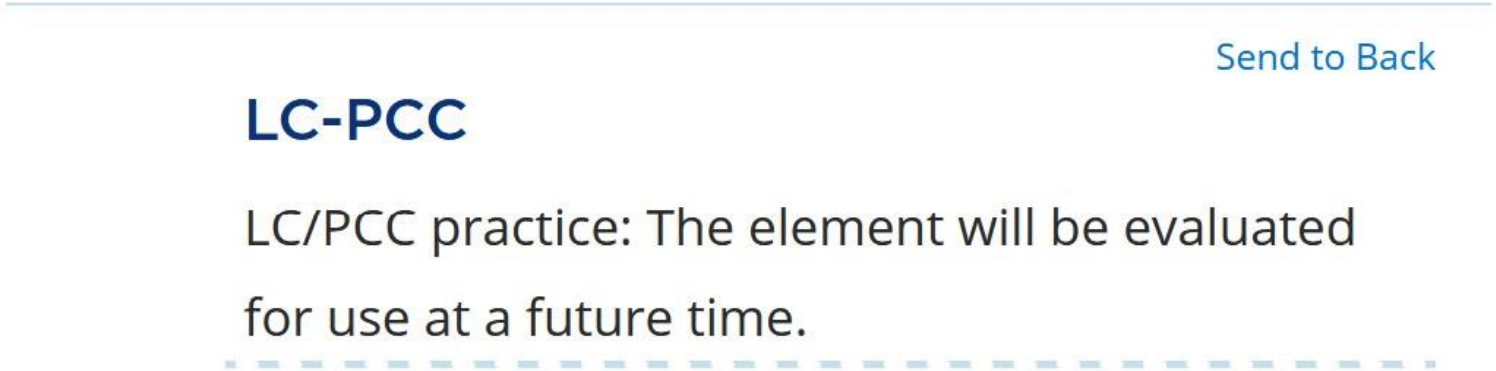
LC/PCC practice: IF: the work is part of a monographic series or a multipart monograph and all parts are individually described, yet lack a title of part or a distinctive title of part, THEN: transcribe a title that uses the common title in conjunction with the numbering and/or dependent title. Do not record a Manifestation: series statement.

Editorial decisions

- Do not record. Evaluate later.
  - Why? Because we don’t have decisions yet.

Editorial decisions: do not record

Editorial decisions: do not record



Editorial decisions

- American spelling
- And/or
- “In most cases” over “generally”
- Vocabulary decisions

Challenging, maddening, exciting, exhausting, interesting work…

Thank you for your attention

Update from Library and Archives Canada

Thi Bao Tran Phan

Library and Archives Canada

Thi Bao Tran Phan

NARDAC? RSC? CCC? ALA? PCC? Huh? The structure of the RDA operation

NARDAC Forum

29 March 2021

Robert L. Maxwell

ALA co-representative to NARDAC

Who's in charge here, anyway?

R | D | A
Steering Committee

RDA Board

NARDAC
North American RDA Committee

ALA American Library Association

Canadian Committee on Cataloguing

CFLA FCAB

LIBRARY LIBRARY OF CONGRESS

PCC Program for Cooperative Cataloging
BIBCO / CONSER / NACO / SACO

CC:DA | Committee on Cataloging: Description & Access

NARDAC

- The North American RDA Committee
- Represents the interests of North American catalogers, excluding Latin America and the Caribbean, i.e., the United States and Canada

NARDAC

- Membership:
  - 2 members from American Library Association
  - 2 members from Canadian Committee on Cataloguing
  - 1 members from The Library of Congress
  - 1 of these members is the NARDAC representative to the RDA Steering Committee

NARDAC

- Current composition:
  - American Library Association representatives
    - Stephen Hearn (chair of NARDAC)
    - Robert L. Maxwell
  - ıadian Committee on Cataloguing representatives
    - Thomas Brenndorfer (NARDAC representative to RSC)
    - Thi Bao Tran Phan (from Library and Archives Canada)
  - Library of Congress
    - Melanie Polutta (NARDAC coordinator of web content)
    - Clara Liao

American Library Association

- U.S. catalogers are represented and make proposals through ALA
  - The principal committee involved at ALA is CORE/Committee on Cataloging: Description and Access
  - CC:DA meets twice a year but works throughout the year
  - Current chair is Glen Wiley
  - https://alcts.ala.org/ccdablog/

Canadian Committee on Cataloguing

- Canadian catalogers are represented and make proposals through the Canadian Committee on Cataloguing
  - CCC meets two to four times a year but works throughout the year
  - Current chair is Sue Andrews
  - https://www.bac-lac.gc.ca/eng/services/cataloguing-metadata/Pages/canadian-committee-cataloguing.aspx

R | D | A
Steering Committee

- Going the other direction, NARDAC is represented in the RDA Steering Committee by the NARDAC representative, Thomas Brenndorfer.

R | D | A
Steering Committee

Current Organization

- **RSC Chair**, Kathy Glennan
- **RSC Secretary**, Linda Barnhart
- Regional Representatives
  - **Europe**, Renate Behrens
  - **North America**, Thomas Brenndorfer
  - **Oceania**, Melissa Parent
- **RDA Examples Editor**, Honor Moody
- **Technical Team Liaison Officer**, Damian Iseminger
- **Translations Team Liaison Officer**, Daniel Paradis
- **Wider Community Engagement Officer**, Ebe Kartus

R | D | A
Steering Committee

Future Organization

- The intent is to have representatives from six regions:
  - Africa
  - Asia
  - Europe
  - Latin America and the Caribbean
  - North America
  - Oceania

RDA Board Members

- The Copyright Holders
  - American Library Association (ALA) (currently no representative)
  - Canadian Federation of Library Associations (CFLA) (Christine Oliver, current Board chair)
  - Chartered Institute of Library and Information Professionals (CILIP) (John Trevor Allen)
- RDA Steering Committee Chair (Kathy Glennan)
- ALA Publishing Representative (James Hennelly)

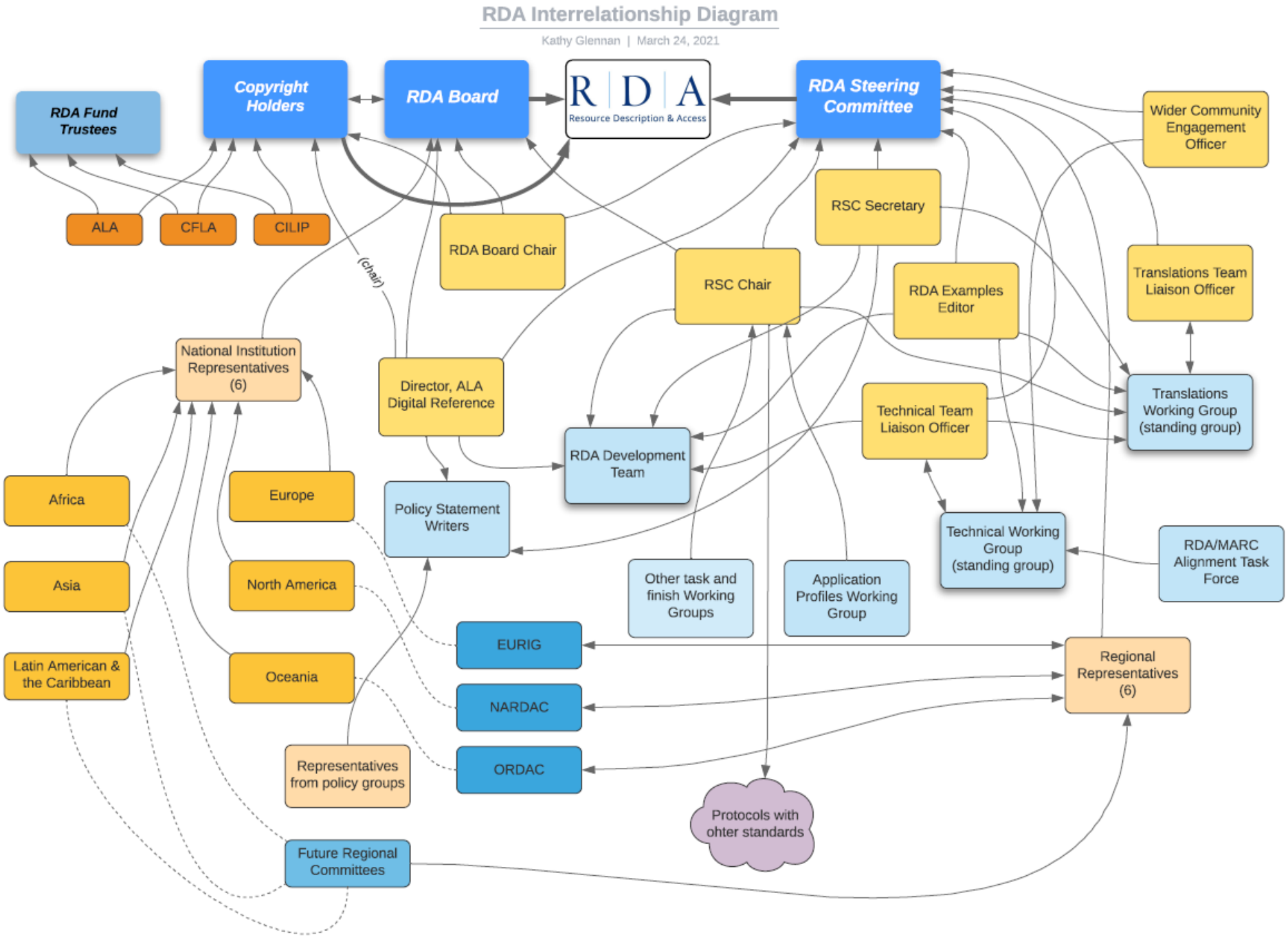
RDA Board Members

- National Institution Representatives
  - **Africa** (Marietjie de Beer, National Library of South Africa)
  - **Asia** (Haliza Jailani, National Library Board, Singapore)
  - **Europe** (Christian Aliverti, Swiss National Library)
  - **Latin America and the Caribbean** (Filiberto Felipe Martinez Arellano, Biblioteca Nacional de México)
  - **North America** (Merideth Fletcher, Library and Archives Canada)
  - **Oceania** (Kim Gutchlag, National Library of New Zealand, New Zealand)

R | D | A
Steering Committee

RDA Board

- Contrasting responsibilities of RSC and the Board
  - The Board and the Copyright Holders set the *strategic direction* for RDA. They approve major undertakings such as the 3R project recently concluded
  - The RDA Steering Committee is responsible for the *development* and *content* of the RDA Standard, including all revisions, additions, and other changes.


RDA Interrelationship Diagram
Kathy Glennan | March 24, 2021
RDA Fund Trustees
Copyright Holders
RDA Board
R D A
Resource Description & Access
RDA Steering Committee
Wider Community Engagement Officer
ALA
CFLA
CILIP
RDA Board Chair
(chair)
RSC Secretary
RSC Chair
RDA Examples Editor
Translations Team Liaison Officer
National Institution Representatives (6)
Director, ALA Digital Reference
Translations Working Group (standing group)
Technical Team Liaison Officer
RDA Development Team
Africa
Europe
Policy Statement Writers
Technical Working Group (standing group)
RDA/MARC Alignment Task Force
Asia
North America
Other task and finish Working Groups
Application Profiles Working Group
EURIG
Latin American & the Caribbean
Oceania
Regional Representatives (6)
NARDAC
ORDAC
Representatives from policy groups
Protocols with ohter standards
Future Regional Committees

Program for Cooperative Cataloging

PCC

BIBCO / CONSER / NACO / SACO

- PCC has a much narrower constituency than NARDAC
  - Only the subset of U.S. and Canadian catalogers that work for a PCC institution
- PCC also has a much broader constituency than NARDAC
  - Many PCC institutions are outside the United States and Canada

Program for Cooperative Cataloging
BIBCO / CONSER / NACO / SACO

Organization

- Policy Committee
  - PCC Chair, Melanie Wacker (with chair-elect and past chair)
  - Permanent members
    - British Library ; Library of Congress ; Library and Archives Canada ; OCLC
  - Other members
    - Several “at-large” members representing
      - BIBCO
      - CONSER
      - NACO
      - SACO
    - Standing Commitee Chairs
      - Standing Committee on Applications
      - Standing Committee on Standards
      - Standing Committee on Training
  - A number of advisors and liaisons from other organizations

Program for Cooperative Cataloging
BIBCO / CONSER / NACO / SACO

Organization

- Steering Committee
  - PCC Chair, Melanie Wacker (with chair-elect and past chair)
  - Representatives from
    - Library of Congress
    - OCLC
    - PCC Secretariat

Program for Cooperative Cataloging

BIBCO / CONSER / NACO / SACO

- Although many non-PCC institutions within the realm of NARDAC choose to follow PCC policies, PCC only has authority to make policy for contributions to PCC programs

NARDAC contrasted with PCC

- The product of NARDAC (with the RDA Steering Committee) is a set of *guidelines* and *instructions* for metadata creation: *Resource Description & Access*
- The product of PCC is *metadata*, as well as some metadata standards (such as vocabularies, workflows, best pratices) outside RDA
- Both produce training, but training isn't the main product or purpose of either entity

Relationship of NARDAC and PCC

- PCC does not have a direct relationship to NARDAC, i.e., there is no PCC representative to NARDAC
- PCC has an indirect relationship via its member institutions (one of which is the Library of Congress)
  - LC has a direct relationship to NARDAC
  - Other US/Canadian PCC institutions have an indirect relationship via ALA or CCC

PCC and RDA: activity

- Current:
  - PCC URIs in MARC Pilot
  - LC-PCC Policy Statements

- Future:
  - Documenting PCC policies on string encoding schemes, which are being removed from RDA proper

Thank you!

RSC Operations in 2021: A Return to “Normal”

Kathy Glennan

Chair, RDA Steering Committee

Head, Cataloging & Metadata Services
University of Maryland Libraries

Today's Topics

- 2021 highlights from the RSC Action Plan
- RSC meetings
  - Schedule
  - Agendas
- RDA change proposal process
  - Fast tracks
  - Discussion papers
  - Proposals

RSC Plans for 2021

- RSC Action Plan 2021-2023: Highlights
  - Continue review of the Resources tab and development of Community resources and Community vocabularies
  - Resolve pseudo-element issues [primarily original RDA 6.28-6.31]
  - Review performance aggregates (amalgamation instructions) and initiate cleanup
  - Begin BIBFRAME mapping
  - Establish new Working Groups:
    - Extent
    - Place/jurisdiction
    - Names of corporate bodies in more than one language
    - Religious content
  - Be responsive to user feedback

Quarterly Meeting Schedule

- Asynchronous meetings
  - January 11-14, 2021
  - April 12-15, 2021
  - July 12-15, 2021
  - Deadline for submitting agenda documents:
    ~3 weeks before the meeting starts
- In person (?) meeting
  - October 11-15, 2021
    - Note: dates not firm; may change based on travel restrictions, a changed meeting location, or need to shift to a virtual meeting
  - Deadline for submitting agenda documents:
    ~3 weeks before the meeting starts

RSC Meeting Agendas

- Asynchronous meeting agendas may include
  - Brief reports from members on their activities since the last meeting
    - Including information sharing from the regions
  - Review and approval of documents developed since the last meeting
  - Discussion papers framing future work
  - Proposals
  - Examples: January 2021 agenda included
    - Review/approval of rolling 3-year Action Plan
    - Review/approval of updated RSC Operations documents
    - Recommendations for moving forward on Pseudo-elements
    - Discussion of next steps with Community resources

RSC Meeting Agendas

- In-person meeting agendas include
  - Formal reports from members, working groups, and liaisons to outside groups
  - Discussion papers and change proposals that would benefit from a more focused discussion
  - Laying the groundwork for the next iteration of the rolling 3-year Action plan
  - Status review/update of action items assigned to RSC members
- If the “in-person” meeting needs to be held virtually
  - Meeting length will expand from 1 to 2 weeks
  - Meeting style will blend synchronous and asynchronous approaches

RDA Change Proposal Process

- Still in a test-and-adjust phase
- Guidance to communities
  - Detailed process in *Policies and Procedures for Updating RDA Content* (RSC/Operations/4)
  - Formatting information in *Guidelines for Proposals, Discussion Papers, and Responses to Them* (RSC/Operations/5)
- Three possibilities
  - Fast track
  - Discussion paper
  - Proposal
- Steps
  - Initial paper
  - RSC discussion and decision
  - Implementation, when applicable

Fast Track Proposals

- Suggestions for improving consistency in wording, additions to vocabularies, and other changes without wider impact
  - Capable of inclusion in RDA without negative impact on its users
  - Must be technically compatible with RDA
    - Can confirm with RSC Technical Working Group
- May be submitted anytime to RSC Chair and RSC Secretary
- Originate with
  - RSC members
    - Via working groups, regions, personal observations, etc.
  - Users
    - Primarily via the “Submit Feedback” link in the Toolkit

Fast Track Proposals

- Normally discussed in the order received
- Short decision-making time frame: 2 weeks
  - Currently only considering one (or one grouping) at a time
- Not publicly posted on RSC website, no formal responses
- Decisions made by RSC voting members
  - Regional representatives may consult with their regions at their discretion
  - Choices: Accept / Revise / Refer to the proposal process / Reject
  - Simple majority required to pass
- Will be implemented in future Toolkit release
  - May not be the “next” one based on timing
- No substantive differences from pre-3R process

Fast Track Proposals

- Approved so far this year
  - Editorial consistency – Elements
    - Changed “that reflects” → “reflecting” in definitions for 4 categorization elements
    - Clarified definitions for *date of capture, polarity, and bibliographic format*
    - Revised 5 “letterer agent” elements for consistency and clarity
  - Clarity – Guidance chapter
    - Modified two paragraphs in Fictitious and non-human appellations chapter

Discussion Papers

- Raise topics for RSC consideration to suggest a need for investigation of issues related to RDA development, to identify issues related to other rule-making bodies, etc.
  - Done for complex proposed changes before going through the formal proposal process
    - Especially useful when more than one approach/solution is possible
    - Same as “briefing papers”, used near the end of the 3R Project
- May be submitted anytime to the RSC Chair and RSC Secretary
  - Will be scheduled for an upcoming RSC meeting
    - This may not be the “next” meeting, based on the RSC’s workload and/or the complexity of the topic

Discussion Papers

- Originate with RSC members, RDA regional groups, or RDA users (via the Wider Community Engagement Officer)
  - RSC may request such discussion papers
  - Before submission, proposers consult the RSC Technical Working Group to confirm that recommendations are technically compatible with RDA
- Posted publicly on RSC website, with information about when it will be discussed
- RSC members may consult with each other before the official RSC meeting
  - These discussions will not be captured formally

Discussion Papers

- Before the RSC meeting
  - Regional representatives consult with the bodies they represent (NARDAC, EURIG, ORDAC)
    - Each region develops its own process for collecting feedback
    - For example, NARDAC will seek feedback from ALA, CCC, and LC
  - All regional bodies expected to respond in some way
    - Looking to minimize the amount of effort and time frame for this step
    - Any formal response posted publicly on the RSC website
      - Need to have a response to each question in the paper

Discussion Papers

- Based on discussion, may be
  - Referred back to the proposer/proposing group for more development or investigation based on the RSC discussion; may include developing a formal proposal
  - Deferred to a later date
  - Rejected
- Outcome of decisions will be in the meeting minutes
  - And shared with the proposing group as appropriate

Discussion Papers

- Differences from the pre-3R era
  - Accepted anytime
  - Could be considered at any of the quarterly RSC meetings, not just the in-person meeting
  - Consultation among RSC members permitted in advance of the meeting
  - Development of a log to indicate briefly the agreement, disagreement, or general comments for discussion in advance of the meeting

Proposals

- Formal recommendations to change, enhance, or delete RDA content
- No requirement for a change proposal to start out as a discussion paper
  - But that step is recommended for complex topics
- May be submitted anytime to the RSC Chair and RSC Secretary
  - Will be scheduled for an upcoming RSC meeting
    - This may not be the “next” meeting, based on the RSC’s workload and/or the complexity of the topic

Proposals

- Originate with RSC members, RDA regional groups, or RDA users (via the Wider Community Engagement Officer)
  - RSC may request such proposals
  - Before submission, proposers consult the RSC Technical Working Group to confirm that recommendations are technically compatible with RDA
- Posted publicly on RSC website, with information about when it will be discussed
- RSC members may consult with each other before the official RSC meeting
  - These discussions will not be captured formally

Proposals

- Before the RSC meeting
  - Regional representatives consult with the bodies they represent (NARDAC, EURIG, ORDAC)
    - Each region develops its own process for collecting feedback
    - For example, NARDAC will seek feedback from ALA, CCC, and LC
  - All regional bodies expected to respond in some way
    - Looking to minimize the amount of effort and time frame for this step
  - Formal responses posted publicly on the RSC website
    - Must contain explicit statement of acceptance/non-acceptance
    - Need to have a response to each recommendation in the proposal

Proposals

- During RSC meeting
  - May be withdrawn by the proposer
  - Otherwise will have discussion and vote
    - Choices: Accept / Revise / Refer for more work / Reject
    - Simple majority needed to pass
- Outcome of decisions will be in the meeting minutes
  - And shared with the proposing group as appropriate
- Will be implemented in future Toolkit release
  - May not be the “next” one based on complexity of making the agreed-upon changes

Proposals

- Changes from pre-3R procedures
  - Accepted anytime
  - Could be considered at any of the quarterly RSC meetings, not just the in-person meeting
  - Consultation among RSC members permitted in advance of the meeting
  - Development of a log to indicate briefly the agreement, disagreement, or general comments for discussion in advance of the meeting
  - Looking to minimize efforts from regional representatives
    - No need for a formal response that simply says, “We agree.”

In the Works

- More fast track proposals
  - Coming at a steady pace
- Formal proposals
  - NARDAC’s Curator agent proposal
    - Undergoing review by RSC Technical Working Group before being sent on for RSC consideration
    - May be on RSC’s July agenda
  - Renaming an element?

More Information

- RSC Action Plan 2021-2023
  - http://rda-rsc.org/sites/all/files/RSC-Chair-2021-1.pdf
- RSC Meeting Calendar for 2021
  - http://rda-rsc.org/node/648
- RSC Agendas
  - http://rda-rsc.org/RSCmeetingagendas
- RSC Operations documents:
  - http://rda-rsc.org/node/608
    - RSC/Operations/4 -- Policy and Procedures for Updating RDA Content
    - RSC/Operations/5 -- Guidelines for Proposals, Discussion Papers, and Responses to Them

Questions?

Email me:
RSCChair@rdatoolkit.org

Update from ALA Digital Reference

James Hennelly, Director

3R Project

- Completed with December 15th Release
- Accomplished Significant Goals
  - ✓ Responsive Design
  - ✓ AA Accessibility
  - ✓ Implementation of IFLA Library Reference Model
  - ✓ Rebuilt structure
  - ✓ Integrated Content

Next Steps

- Work Continues on Translations
  - Norwegian complete
  - Finnish soon
  - Others uncertain
- Same for Policy Statements
  - BL and LC-PCC continue to build
  - MLA BP beginning work in the CMS
- Further Toolkit Development
  - Visual Browser
  - Mapping Tool

Orientation Efforts

- Continuing RDA Lab Series
- Toolkit Demos
- YouTube Channel
- Print Products
  - RDA Glossary
  - Introducing RDA: A Guide to Basics after 3R
  - RDA Workbook (to come)
  - RDA Essentials (to come)
- Submit Feedback Button

Other Information

- RDA-L on ALA Connect
- 2021 Release Schedule
  - April 6
  - July 27
  - October 5
- COVID-19 Response
  - Extended Free Trials
  - Discounted pricing for new and returning subscribers

Contact Us

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

RDA and Encoding Formats

Stephen Hearn, University of Minnesota
NARDAC chair

Content standard vs encoding

- Content standard tells what to record and how
- Encoding formalizes analysis, terminology, and syntax
- RDA builds on RDF to provide both

Resource Description Framework

- Basis of linked data
- Simple analysis, simple syntax
  - Subject / Predicate / Object
  - Each expressed with URI or string
- Easy to compare statements made in RDF

Maps and alignments

- RDA Registry includes:
  - RDA as open linked data vocabulary
  - Maps and alignments with encoding formats
- Same vs. different
  - Encodings reflect conceptual models
  - Conceptual models differ

Conformance

- Defined in the RDA Guidance section on Well-formed RDA
- A *metadata statement* is conformant with RDA if all of the following requirements are met.
  - The statement is well-formed
  - The statement describes an instance of an RDA entity
  - The statement records a value of an RDA element assigned to the entity
  - The statement records a value that is compatible with the RDA guidance and instructions
- A well-formed RDA metadata statement can be formatted in a basic subject-predicate-object syntax, where the subject is the entity being described, the predicate is the characteristic being recorded, and the object is the recorded value of the characteristic.

Other encodings - DC

RDA	mapping	DCT
rdaa:P50039	rdfs:subPropertyOf	dct:date
rdae:P20001	rdfs:subPropertyOf	dct:type
rdae:P20002	rdfs:subPropertyOf	dct:identifier
rdae:P20004	rdfs:subPropertyOf	dct:date
rdae:P20006	rdfs:subPropertyOf	dct:language
rdae:P20009	rdfs:subPropertyOf	dct:hasVersion
rdae:P20011	rdfs:subPropertyOf	dct:contributor
rdae:P20012	rdfs:subPropertyOf	dct:contributor
rdae:P20013	rdfs:subPropertyOf	dct:contributor
rdae:P20014	rdfs:subPropertyOf	dct:contributor
rdae:P20015	rdfs:subPropertyOf	dct:contributor
rdae:P20016	rdfs:subPropertyOf	dct:contributor

Other encodings – MARC21

rdaw:P10050	rdakit:hasM21	"100 ** $a, b, c, d, g, q, u [structured description]" .
rdaw:P10051	rdakit:hasM21	"100 ** $a, b, c, d, g, q, u [structured description]" .
rdaw:P10052	rdakit:hasM21	"100 ** $a, b, c, d, g, q, u [structured description]" .
rdaw:P10053	rdakit:hasM21	"100 ** $a, b, c, d, g, q, u [structured description]" .
rdaw:P10054	rdakit:hasM21	"100 ** $a, b, c, d, g, q, u [structured description]" .
rdaw:P10055	rdakit:hasM21	"100 ** $a, b, c, d, g, q, u [structured description]" .
rdaw:P10056	rdakit:hasM21	"100 ** $a, b, c, d, g, q, u [structured description]" .
rdaw:P10057	rdakit:hasM21	"100 ** $a, b, c, d, g, q, u [structured description]" .
rdaw:P10058	rdakit:hasM21	"100 ** $a, b, c, d, g, q, u [structured description]" .

Other encodings – MARC relators

has arranger of music	has equivalent	Arranger
has art director	has equivalent	Art director
has artist	has equivalent	Artist
has author	has narrower	Analyst
has author	has narrower	Author in quotations or text abstracts
has author	has equivalent	Author
has author	has narrower	Dissertant
has author	has narrower	Dubious author
has author	has narrower	Metadata contact
has author	has narrower	Reviewer
has author	has narrower	Reporter
has autographer	has equivalent	Autographer
has binder	has equivalent	Binder

MARC to RDA conversion

- MARC tagging and relators taken together
- 700 1 $a $4 aut = has author person

  http://rdaregistry.info/Elements/w/P10436
- Conversion of some MARC metadata to conformant RDA seems possible
- MARC encoding expresses constraints similar to RDA

Entity type question

- RDA entity descriptions do not include an element to declare entity class
- Entity type is declared by predicates used to describe the entity
- Why?
  - Simplifies mapping and alignment?
  - Avoids examining instance declarations of class?
  - Enables use wider use of linked data descriptions?

Questions?