

MINUTES OF NOVEMBER 2016 MEETING

RDA Steering Committee

Deutsche Nationalbibliothek
Frankfurt am Main, Germany
7-11 November 2016

[Note: Does not include content of Executive Sessions]

TABLE of CONTENTS

Executive Session 1

- 1 Welcome
- 2 Liaison with the RDA Board
- 3 Liaison with the Co-Publishers of RDA
- 4 Transition to new governance structure
- 5 RSC business processes
- 6 Translation activities: Toolkit and OMR
- 7 Information from RDA communities
- 8 Status of 2015-2016 actions
- 9 Formal recognition of individuals and groups contributing to the development of RDA

End of Executive Session 1

Executive Session 2

- 10 3R Toolkit project: Toolkit website
- 11 3R Toolkit project
- 12 3R Toolkit project: Additional considerations
- 13 Work plan

End of Executive Session 2

- 14 Goethe-Haus Tour and Reception

Executive Session 3

- 15 LRM and related issues

End of Executive Session 3

Beginning of Public Session

- 16 Beginning of the public session
- 17 Approval of the agenda
- 18 Minutes of the previous meeting held November 2015
- 19 Reports: RSC Chair, RSC Secretary, and RDA Examples Editor
- 20 Reports: Working Groups
- 21 Reports: Liaisons with external groups
- 22 Provenance: RSC/TechnicalWG/1 (RDA models for provenance data)
- 23 Provenance: RSC/Europe/1 (Proposal on sources of information (RDA 2.2.2))
- 24 Provenance: RSC/Europe/3 (Revision of RDA 1.10.3 (Quotations in notes))
- 25 Aggregates: RSC/AggregatesWG/1 (Discussion paper: RDA and WGA treatment of aggregates)
- 26 Aggregates: RSC/ALA-CCC/Discussion/1 (Discussion paper: Accompanying material in RDA)
- 27 Aggregates: RSC/LC/1/rev (Revision to instructions for Commentary, Etc., Added to a Previously Existing Work (6.27.1.6))
- 28 FT discussion of illustrative content/supplementary content
- 29 Relationships: RSC/RelationshipWG/1 (RDA models for relationship data)
- 30 Relationships: RSC/Europe/2 (Repositioning of relationship designator “screenwriter” from I.2.1 to I.2.2)
- 31 Audiovisual resources: RSC/ALA/1/rev (Adding controlled vocabulary to RDA 3.19.6, Regional encoding, and to the glossary)
- 32 Legal resources: RSC/ALA/2/rev (Expanding RDA 6.29.1.3, Laws governing more than one jurisdiction)

- 33 Rare resources: RSC/RareWG/1/rev (Early printed resources and rare printed resources)
- 34 Rare resources: RSC/RareWG/2/rev (Revision of RDA 1.8.1, Numbers expressed as numerals or as words)
- 35 Rare resources: RSC/RareWG/3 (Revision of RDA 3.4.5, Extent of text)
- 36 Rare resources: RSC/RareWG/4/rev (Revisions to RDA 3.12 Book format and related terms)
- 37 Rare resources: RSC/RareWG/5/rev (Revision of RDA 3.21.2.9 Note on extent of manifestation, early printed resources)
- 38 Rare resources: RSC/RareWG/6/rev (Revision of RDA 2.2.2.2 Sources of information)
- 39 Music resources: RSC/MusicWG/1/rev (Additions and revisions to RDA 7.11, Place and date of capture)
- 40 Music resources: RSC/MusicWG/2/rev (Additions and revisions to RDA 2.15.3, Plate number for music)
- 41 Music resources: RSC/MusicWG/3/rev (Replacement of RDA 6.15 Medium of performance)
- 42 Music resources: RSC/MusicWG/4/rev/1 (Revision of RDA 6.28.1.9 and 6.28.1.10, Additions to access points representing musical works)
- 43 Internationalization: RSC/LC/2/rev (Language and script instructions for chapters 6 and 7)
- 44 Internationalization: RSC/ALA/3 (Providing greater flexibility in creating variant access points (RDA Chapters 5, 6, 8, 9, 10, and 11))
- 45 Internationalization: RSC/TechnicalWG/2 (RDA 9.2: Addition of elements for Given name and Surname)
- 46 Briefing paper: RDA technical terminology
- 47 Updated Standard ISO 5127-2016 -- Foundation and vocabulary of information and documentation
- 48 Records in Context draft from ICA Experts Group on Archival Description

- 49 Liaisons with other standards
- 50 IFLA LRM and possible collaboration
- 51 Outstanding business from this meeting
- 52 Unresolved Fast Track entries
- 53 “Outcomes” from this meeting
- 54 Any other business?

End of Public Session

Executive Session 4

- 55 Issues from Executive Sessions 1-3
- 56 Next meeting in 2017
- 57 Action items from the meeting
- 58 Other issues from the week’s discussions

End of Executive Session 4

End of the 2016 RSC Meeting

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Appendix for public minutes

Minutes: of the forty-third meeting of the Committee, also known as the first meeting as the RDA Steering Committee, held at the Deutsche Nationalbibliothek, Frankfurt am Main, Germany, 7-11 November 2016.

Present: RSC

Renate Behrens, Europe
Kathy Glennan, American Library Association
Ebe Kartus, Australian Committee on Cataloguing
William Leonard, Canadian Committee on Cataloguing
David Reser, Library of Congress
Gordon Dunsire, Chair
Kate James, Examples Editor
Judith Kuhagen, Secretary
Linda Barnhart, Secretary-Elect

RDA Board

Simon Berney-Edwards, Chair

Co-Publishers

James Hennelly, Director, ALA Digital Reference

Observers in attendance

Rita Albrecht, Universitaetsbibliothek Johann Christian Senckenberg (Nov. 8-10)
Barbara Block, Gemeinsamer Bibliotheksverbund (Nov. 10)
Inês Cordeiro, National Library of Portugal; Permanent UNIMARC Committee (Nov. 8-10)
Barbora Drobíková, Univerzita Karlova / Charles University in Prague; Member of FRBR RG (Nov. 9-10)
Axel Ermert, Institut für Museumsforschung, Staatliche Museen zu Berlin (Germany) (Nov. 8-10)
Deborah Fritz, TMQ, Inc.; Chair, RSC Aggregates Working Group (Nov. 8-11)
Massimo Gentili-Tedeschi, Istituto Centrale per il Catalogo Unico, ISBD RG Chair (Nov. 8-10)
Silke Horny, Bibliotheksservice-Zentrum Baden-Wuerttemberg (BSZ) (Nov. 9)
Damian Iseminger, New England Conservatory; Chair, RSC Music Working Group (Nov. 8-11)
Irena Kavčič, Narodna in univerzitetna knjižnica/National and University Library (Slovenia) (Nov. 8-10)
Gerlind Ladisch, Bibliotheksservice-Zentrum Baden-Wuerttemberg (BSZ) (Nov. 9)

Francis Lapka (attending virtually), Yale University; Chair, RSC Rare Materials Working Group (Nov. 9)
Françoise Leresche, Bibliothèque nationale de France (Nov. 8-11)
Barbara Pfeifer, Deutsche Nationalbibliothek (Nov. 8-11)
Pat Riva (attending virtually), Concordia University; Chair, Capitalization WG; Chair, LRM Consolidation Editorial Group (Canada) (Nov. 10)
Mélanie Roche, Bibliothèque nationale de France (Nov. 8-11)
Esther Scheven, Deutsche Nationalbibliothek (Nov. 8-10)
Christian Schütz, Deutsche Nationalbibliothek; ISSN Network (Nov. 8 and 10)
Marja-Liisa Seppälä, Kansalliskirjasto / The National Library of Finland (Nov. 8-11)
Thora Sigurbjornsdottir, Reykjavik City Library (Nov. 8-9)
Ragna Steinarsdottir, National and University Library of Iceland (Nov. 8-10)
Heidrun Wiesenmüller, Stuttgart Media University (Nov. 8-10)
Mirna Willer, University of Zadar (Croatia) (Nov. 8-11)

Executive Session

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- 11 3R Toolkit project
- 12 3R Toolkit project: Additional considerations
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End of Executive Session

Beginning of Public Session

Public Session 1

16 **Beginning of the public session**

16.1 Gordon Dunsire opened the public session by welcoming observers. All RSC members and observers introduced themselves.

17 **Approval of the agenda**

17.1 The agenda was approved as proposed. [Note: These minutes reflect the order of the discussion as held.]

18 **Minutes of the previous meeting held November 2015**

18.1 Gordon Dunsire noted that a revised version of the minutes of the 2015 RSC meeting was sent by the RSC Secretary via email. Comments by RSC members will be received through mid-November and will be approved by email. Public minutes will then be posted on the RSC website.

ACTION: RSC members/RSC Secretaries

19 **Reports: RSC Chair, RSC Secretary, and RDA Examples Editor**

19.1 Gordon Dunsire commented that for the coming year he prefers requests for him to speak about RDA go to the Wider Community Engagement Officer, a position currently under recruitment.

19.2 The RSC Chair and RSC Secretary reports were received without further comment. [See the reports in the appendix for public minutes.]

19.3 The RDA Examples Editor report was received. Kate James thanked the many people that helped her throughout the year, and noted that the long-term initial articles project was finished except for one straggler. [See the report in the appendix for public minutes.]

- 19.4 Kate James shared a new kind of example that is now on the Toolkit website: a diagram that graphically depicts specific RDA entities, elements, and relationships.

20 Reports: Working Groups

- 20.1 The RSC acknowledged the reports submitted by the chairs of the Working Groups. [See the reports in the appendix for public minutes.]
- 20.2 Damian Iseminger raised the issue of the future of the Music Working Group. The group would like more participation from Europe and less from North America. They would benefit from perspectives outside of Western art music. They expect more collaboration with the Aggregates Working Group in the coming year.
- 20.3 The RSC discussed the RDA/ONIX Framework Working Group. William Leonard asked whether it should be a standing group or had perhaps outlived its usefulness. Gordon Dunsire suggested that it probably needs to continue, especially in light of the current work on aggregates; supplementary materials need to fit into this framework. ONIX has never adopted the framework, so an interchange mechanism has not been realized. However, the mapping has been useful and used. Gordon Dunsire recommended watching the ONIX-side activity in the coming years; if the activity level is low, their work could be absorbed into the Technical Working Group.
- 20.4 The RSC observed that in general the Working Groups need to diversify membership; cross-pollination between Working Groups is also essential. The example of having a Relationship Designator Working Group member also on the Aggregates Working Group was cited. Liaising between groups has been assigned in Working Group tasks, but membership of the groups will help this to happen. The group discussed the relationship between communities and Working Groups. More work needs to be done here. The RSC wondered about putting out a call for Working Group membership.
ACTION: RSC Chair/RSC Secretaries

21 Reports: Liaisons with external groups

- 21.1 The RSC acknowledged the reports submitted by the liaisons. [See the reports in the appendix for public minutes.]
- 21.2 Gordon Dunsire reported for the FRBR Review Group. He described the formal approval process that the IFLA LRM standard will undergo in the coming months, but said that it is unlikely that there will be substantive changes to the content. The RSC can proceed with confidence on implementing LRM now.

- 21.3 The RSC discussed the protocols with the Network Development and MARC Standards Office at the Library of Congress. The ambiguity in the process of who notifies this office when RDA vocabularies change must be resolved.
ACTION: RSC Chair/RSC Secretaries

End of Public Session 1

Beginning of Public Session 2

22 Provenance: RSC/TechnicalWG/1 (RDA models for provenance data)

- 22.1 The RSC received and considered the proposal and the responses of the RSC communities and the Rare Materials and Technical Working Groups.
- 22.2 Purpose of the proposal: to discuss the models used by RDA to accommodate provenance and other meta-metadata; to make general and specific recommendations for developing RDA to improve its accommodation of provenance data.
- 22.3 The RSC discussed three recommendations provided in the Working Group's response to the community responses.
- 22.4 The RSC generally accepted recommendation 1, with the understanding that practical implementation will come later. There was broad discussion about authority control systems and the role of RDA. David Reser suggested that the LRM has good wording about Nomen and differentiating; perhaps this general guidance might be useful in RDA.
- 22.5 The RSC discussed recommendation 2 without clear resolution. ALA expressed concerns, and the group focused on whether there is need for a distinction between public and non-public notes. There might also be a ripple effect task to look at "Note on" elements (which could become "Note about" elements). Deborah Fritz has a list of "sources consulted" that might be a useful starting point.
- 22.6 The RSC discussed recommendation 3, particularly the importance of provenance in a data set that includes crowdsourced data, machine-produced data, and curated data. Gordon Dunsire pointed out that there is no concept of "record," or fixed data bundles, in RDA; there is also no concept of "mandatory," so provenance data likewise cannot be mandatory. He noted that he has started removing the word "identify" (as in "identifying attributes") from instructions, which will be needed for the 4-fold path, and told the RSC to expect more wordsmithing like this as restructuring proceeds. Proposed text will be in 0.13 and 0.14; ALA has concerns about the options in 0.13.

- 22.7 It was noted that RSC needs to formalize its group of policy statement writers and streamline processes so that policy statements can be more timely and easier to maintain. This also holds true for translators.
- 22.8 The RSC accepted recommendations 1-4, but referred the proposal for consideration as part of the 3R Project.

23 Provenance: RSC/Europe/1 (Proposal on sources of information (RDA 2.2.2))

- 23.1 The RSC received and considered the proposal and the responses of the RSC communities, and congratulated the Europe community on its first formal proposal.
- 23.2 Purpose of the proposal: to revise RDA 2.2.2, *Preferred Source of Information*, in the areas of resources consisting of moving images, tangible other resources, and online information presented together with digital documents.
- 23.3 The RSC discussed this proposal at length and did not come to consensus. LC is concerned about losing the context of the resource itself and wants to maintain the distinction between the resource and outside the resource; LC argued for keeping the basis for description. ALA is unwilling to abandon the prescribed order. ACOG and EURIG argued that cataloguers don't have the time to look at the title frames, and that users know what it written on the container (and not the label). Deborah Fritz noted that many DVDs are aggregates.
- 23.4 Gordon Dunsire questioned whether the group had not already agreed to provide provenance data/source of information for everything. He wondered if this could be resolved according to more general principles, perhaps in a policy statement. He suggested indicating the default position and then specifying if the data is not taken from there.
- 23.5 The RSC decided that this proposal needed to be looked at in a bigger context, and to fold it into the actions from RSC/TechnicalWG/1. The RSC needs to take a holistic view of sources of information, and to understand the two conflicting approaches that were manifested here. It was noted that this could have a huge ripple effect and wording will be critical.
- 23.6 The RSC approved the change expressed in the ALA response to the definition of "container," and noted that "resource" in this definition will also be changed to "manifestation or item." This change will be made for the February release.
ACTION: RSC Secretaries
- 23.7 The RSC briefly discussed landing pages, and agreed to come back to this topic when discussing RSC/ALA-CCC/Discussion/1.

- 23.8 The RSC did not accept the proposal. It is referred for consideration in conjunction with RSC/TechnicalWG/1 as part of the 3R Project. The definition of “container” will be changed in the February 2017 release of Toolkit.

24 Provenance: RSC/Europe/3 (Revision of RDA 1.10.3 (Quotations in notes))

- 24.1 The RSC received and considered the proposal and the responses of the RSC communities.
- 24.2 Purpose of the proposal: to revise RDA 1.10.3, *Quotations in notes*, to make the instruction less prescriptive.
- 24.3 Gordon Dunsire described this proposal as related to the concept of manifestation statement. He suggested that there should be no quotation marks if information comes from the manifestation itself; otherwise, every element from a manifestation would need to be quoted. Sources outside of the manifestation itself should use quotation marks.
- 24.4 The RSC accepted the proposal as modified by the wording in the ALA response and per discussion.
- 24.5 For the final version with the approved changes, see RSC/Europe/3/Sec final on the RSC website.

End of Public Session 2

Beginning of Public Session 3

25 Aggregates: RSC/AggregatesWG/1 (Discussion paper: RDA and WGA treatment of aggregates)

- 25.1 The RSC received and considered the discussion paper and the responses of the RSC communities and Working Group.
- 25.2 Purpose of the discussion paper: to analyse the treatment of aggregates in the models found in the FRBR Working Group on Aggregates report and FRBRoo; to suggest an amended model; to identify issues still needing resolution.
- 25.3 Deborah Fritz introduced the discussion paper and led the discussion. She raised the question: How can we allow catalogers the flexibility for both detail and no detail? The RSC discussed five of the six questions raised in the proposal.
- 25.4 The RSC unanimously agreed with question 1 (Is it important to retain the distinction between a whole-part work and an aggregation work?)

- 25.5 The RSC agreed, but did not have wording suggestions for question 2 (Does the RSC agree that it would be useful to provide simple direct wording to enable a cataloguer to differentiate between a whole-part work vs. an aggregation work?) The comment from the Europe community about pre-conceived and post-conceived was helpful, but the group felt there is more to it. Gordon Dunsire urged consideration of the user's point of view in thinking about the units they will want to retrieve, wherever they can be found. He also wondered that, although it may be desirable, it might not be necessary to make this distinction.
- 25.6 The RSC unanimously agreed with question 3 (Does the RSC agree that an "Incorporated in/Incorporates" relationship is useful for describing aggregates and a relationship element for it should be added, at some later date, to RDA?)
- 25.7 The RSC did not offer any concrete guidance on question 4 (Can the RSC offer guidance on an appropriate label for this relationship element [and] where this relationship element would fit in the hierarchy of Expression relationships at RDA J.3?) It was observed that LRM will use "aggregated by/aggregated in." It was suggested that, following a solid definition, the Relationships Working Group should be consulted. There was broad discussion about where this would fit in the hierarchy of expression relationships. One person suggested that appendices will be going away in the restructure. Another person noted that whole-part relationships occur at all WEMI levels, not just the expression level. Another person said that there is difference between meaningful and conceptual definitions, and that these definitions need to work for the library, archives, and museum communities.
- 25.8 The RSC had a broad discussion surrounding question 5 (Does the RSC agree that a "Creator of Content/Creator of Content of" relationship is useful for adding short-cut access to an expression of an Aggregated Work when it does not seem necessary to describe distinct works and expressions separately, and that a relationship element for it should be added, at some later date, to RDA?) It was noted by several people that every detail doesn't need to be articulated, and that RDA does not need to be as granular as FRBRoo or PRESSoo. Concerns were raised about practicality and about what users expect and need.
- 25.9 The proposal may be revisited again for practical actions at the end of the week.
- 25.10 The RSC referred the proposal for consideration as part of the 3R Project.

26 Aggregates: RSC/ALA-CCC/Discussion/1 (Discussion paper: Accompanying material in RDA)

- 26.1 The RSC received and considered the discussion paper and the responses of the RSC communities.

- 26.2 Purpose of the discussion paper: to examine the current definitions of and instructions for accompanying material in RDA.
 - 26.3 Kathy Glennan introduced the discussion paper, prepared by a joint ALA-CCC Working Group, and gave credit to the two co-chairs for their success with this new model for working together. The paper addresses the issues raised in 6JSC/ALA/40 (Revision to RDA 3.1.4, Resources Consisting of More than One Carrier Type and RDA 3.4.1.3, Recording Extent), an unsuccessful, complex proposal from 2015.
 - 26.4 Seven issues and one deferred issue outlined in the discussion paper were considered.
 - 26.5 The Joint Working Group feels that the definition of accompanying material has outlived its usefulness; it is a term from AACR. The group recommends leaving this term behind and changing the way people think about units, preferring a distinction between primary and secondary.
 - 26.6 Gordon Dunsire commented that this is very useful as a discussion paper, and that it intersects with other areas of RSC work, such as aggregates, 4-fold path, LRM, etc. There is sufficient analysis that progress can be made. He noted that another Working Group may need to prepare the actual text once we know the new structure and fuller context.
 - 26.7 The RSC thanked the Joint Working Group for their productive work on this topic.
 - 26.8 The RSC referred the discussion paper for consideration as part of the 3R Project.
- 27 Aggregates: RSC/LC/1/rev (Revision to instructions for Commentary, Etc., Added to a Previously Existing Work (6.27.1.6))**
- 27.1 The RSC received and considered the proposal, the responses of the RSC communities, and the revised proposal.
 - 27.2 Purpose of the proposal: to clarify how the instructions in RDA 6.27.1.6 are applied in relation to other instructions in 6.27 and clarify which “work” is being referenced in an instruction that seems to involve multiple works.
 - 27.3 David Reser thanked CCC for its re-wording suggestions and ALA for providing an additional concept.
 - 27.4 Deborah Fritz has some concerns about the final wording.
 - 27.5 Kathy Glennan noted an educational task that commentaries are compilations.

- 27.6 The RSC asked David Reser and Deborah Fritz to provide final wording as a pre-draft of the Sec final document, and accepted the revised proposal. Gordon Dunsire cautioned against writing too much that could be deleted with the larger restructure.
ACTION: David Reser and Deborah Fritz
- 27.7 Gordon Dunsire also noted that as instructions are reviewed during the 3R Project, some will be removed and put in generalized chapters. A careful audit trail will need to be made in the disaggregation process for these instructions that disappear.
ACTION: RSC Chair/RSC Secretaries
- 27.8 The RSC continued to discuss the proposal through email clarifications with the LC representative and Aggregates Working Group Chair after the meeting. For the final version of the approved changes, see RSC/LC/1/rev/Sec final on the RSC website.

28 FT discussion of illustrative content/supplementary content

- 28.1 This topic was discussed earlier in the meeting (see 15.7) and reinforced here.
- 28.2 The agreed-upon solution is to reinstate the parenthetical (e.g., *chart, music*). Kathy Glennan will think about the need for a third term, but it is likely there will be only these two.
- 28.3 The Chair, Secretaries, and Kathy Glennan will consult, and Kathy will discuss with her community for implementation in the April 2017 update [actually published in the February release].
ACTION: Kathy Glennan/RSC Chair/RSC Secretaries

End of Public Session 3

Beginning of Public Session 4

29 Relationships: RSC/RelationshipWG/1 (RDA models for relationship data)

- 29.1 The RSC received and considered the proposal and the responses of the RSC communities and Working Group.
- 29.2 Purpose of the proposal: to discuss how RDA accommodates relationships between instances of different entities; to make general and specific recommendations for developing RDA to improve its accommodation of relationship data.

- 29.3 This paper was jointly prepared with the Technical Working Group.
- 29.4 The RSC discussed the five recommendations presented in the paper.
- 29.4.1 There was general agreement on recommendation 1, to generalize the Related... entity elements to cover all RDA current and future entities as specified in the appendix to the proposal.
- 29.4.2 There was general agreement on recommendation 2, to add designators for subject-related Person, Family, and Corporate Body entities to Appendix M. Some concern was expressed about the overlap between family name and surname. This may not be implemented in Appendix M.
- 29.4.3 There was general agreement recommendation 3, which proposed to add cross-entity designators for items that are reproduced as manifestations to Appendix J. There was no consensus on where in Appendix J these should be placed, nor was there consensus on the labels themselves. It was noted that this recommendation would have a big impact on the organization of designators.
- 29.4.4 Discussion of recommendations 4 and 5 moved into the broader topic of designators, reciprocals, and relationship elements and how they should be arranged in the restructured Toolkit. The RSC also talked about the circumstances under which new designators should be proposed, and the process that RSC should use to evaluate them.
- 29.5 The RSC accepted recommendations 1 and 2 from the proposal, with RSC Secretary Judy Kuhagen providing the final wording.
ACTION: Judy Kuhagen
- 29.6 For the final version of the approved changes, see RSC/RelationshipWG/1/Sec final on the RSC website.

30 Relationships: RSC/Europe/2 (Repositioning of relationship designator “screenwriter” from I.2.1 to I.2.2)

- 30.1 The RSC received and considered the proposal and the responses of the RSC communities.
- 30.2 Purpose of the proposal: to move the relationship designator “screenwriter” from RDA I.2.1 to I.2.2; to propose a new definition for the term.

- 30.3 Renate Behrens noted that this proposal is part of the bigger aggregates package. Deborah Fritz expressed concern that this proposal should not go forward now so that it could be considered by the Aggregates Working Group in the context of their larger work.
- 30.4 Gordon Dunsire is concerned that if repositioning this relationship designator went forward now it would immediately be undone with 3R Project work.
- 30.5 This proposal was not accepted. It is referred to the Aggregates Working Group and the Relationship Designators Working Group for further development.

End of Public Session 4

Beginning of Public Session 5

31 Audiovisual resources: RSC/ALA/1/rev (Adding controlled vocabulary to RDA 3.19.6, Regional encoding, and to the glossary)

- 31.1 The RSC received and considered the proposal, the responses of the RSC communities, and the revised proposal.
- 31.2 Purpose of the proposal: to expand the scope of RDA 3.19.6, *Regional encoding*, to include all types of digital files; to add a controlled vocabulary for standardized regional codes to 3.19.6.3, the glossary, and the RDA Registry; to create 3.19.6.4, *Details of Regional Encoding*, to accommodate any additional information about regional encoding.
- 31.3 The RSC discussed the ACOC response that a new vocabulary should not be added here, and noted as well that the vocabulary essentially is two separate lists.
- 31.4 Gordon Dunsire said that the next step for RDA Registry integration with Toolkit is populating the vocabularies; display conventions in the future could be set by user profile. This led to further discussion of options for display of glossary definitions, and the impact of vocabulary changes on translators.
- 31.5 Gordon Dunsire noted that a regional encoding statement is a form of manifestation statement, and introducing this now would be useful for legacy information later.
- 31.6 The RSC accepted the revised proposal, noting the missing word “videodisc” in the definition for Region 4.
- 31.7 The RSC continued to discuss the proposal via email after the meeting. For the final version of the approved changes, see RSC/ALA/1/rev/Sec final on the RSC website.

32 Legal resources: RSC/ALA/2/rev (Expanding RDA 6.29.1.3, Laws governing more than one jurisdiction)

- 32.1 The RSC received and considered the proposal, the responses of the RSC communities, and the revised proposal.
- 32.2 Purpose of the proposal: to add instructions to RDA 6.29.1.3, *Laws Governing More Than One Jurisdiction*, to address creating an authorized access point for a single law that governs multiple jurisdictions; to allow for naming the work by enacting jurisdiction when known, and by title when the enacting jurisdiction is unknown or uncertain; to add examples to support the new paragraphs.
- 32.3 Kathy Glennan said that ALA is looking for a solution that results in an authorized access point that has meaning and is not misleading.
- 32.4 The RSC discussion included concerns about the order of jurisdictions, options if there were a large number of jurisdictions, and references to other chapters in RDA.
- 32.5 Kathy Glennan will take these comments into consideration and will prepare a follow-up proposal.
ACTION: Kathy Glennan
- 32.6 The RSC accepted the revised proposal as modified in a follow-up document.
- 32.7 The RSC continued to discuss the proposal via email after the meeting. The Sec final document reflects an interim development that allows the scope of the underlying issues (e.g., “jurisdiction” as a place or a corporate body; other values valid for Protocol, etc.) to be identified for further development in the 3R Project. This area of RDA is likely to undergo substantial revision for the April 2018 RDA Toolkit. The RDA Registry will not reflect these changes in the meantime. For the final version of the approved proposal, see RSC/ALA/2/rev/ALA follow-up/Sec final on the RSC website.

33 Rare resources: RSC/RareWG/1/rev (Early printed resources and rare printed resources)

- 33.1 The RSC was joined by Francis Lapka, Chair of the Rare Materials Working Group, via telephone/webcam.
- 33.2 The RSC received and considered the proposal, the responses of the RSC communities, and the revised proposal.

- 33.3 Purpose of the proposal: to revise the chronological scope of the term “early printed resources” to accommodate regional differences for the concept of early; to define “rare printed resources” as a category of materials for which an agency may choose to provide a more detailed description of the resources as a physical object; to revise RDA instructions for “early printed resources” so that they may also be applied for “rare printed resources,” where there is no justification for limiting application to early materials.
- 33.4 The RSC supported the change in definition of “early printed resources” as provided in the revised proposal.
- 33.5 The RSC supported the first option provided in the revised proposal for the treatment of “rare printed resources.”
- 33.6 The third and fourth changes recommended in the revised proposal were withdrawn by the Working Group.
- 33.7 Kathy Glennan described an ALA concern about including the term “printed,” and their view that “rare resource” would be more broadly applicable.
- 33.8 Gordon Dunsire suggested replacing “resource” with the specific entity “manifestation.”
- 33.9 The RSC accepted change 1 and change 2 (option 1) of the revised proposal with the additional modification of replacing “resource” with “manifestation.”
- 33.10 For the final version of the approved changes, see RSC/RareWG/1/rev/Sec final on the RSC website.

34 Rare resources: RSC/RareWG/2/rev (Revision of RDA 1.8.1 Numbers expressed as numerals or as words)

- 34.1 The RSC received and considered the proposal, the responses of the RSC communities, and the revised proposal.
- 34.2 Purpose of the proposal: to revise the alternative in RDA 1.8.1, *Numbers Expressed as Numerals or as Words*, for early printed resources.
- 34.3 Judy Kuhagen noted that the final paragraph of the proposed new Exception is really an Optional Addition to the Exception. David Reser noted that this optional addition would provide flexibility.
- 34.4 Kathy Glennan noted that “and access” in this optional addition is inappropriate in Chapter 2 and should be deleted.

- 34.5 General concern was expressed about how long the lists are and where the exception should be located.
- 34.6 The RSC accepted the revised proposal as modified per discussion. Gordon Dunsire said that instruction 1.8 would be reconsidered as part of the 3R Project.
- 34.7 For the final version of the approved changes, see RSC/RareWG/2/rev/Sec final on the RSC website.

35 Rare resources: RSC/RareWG/3 (Revision of RDA 3.4.5 Extent of text)

- 35.1 The RSC received and considered the proposal and the responses of the RSC communities.
- 35.2 Purpose of the proposal: to revise the instructions and exceptions in RDA 3.4.5, *Extent of Text*, for early printed resources; to broaden the scope of the exceptions for early printed resources; to move and revise the exception for early printed resources in RDA 3.4.5.2; to broaden the scope of the exception in RDA 3.4.5.3.2.
- 35.3 The Rare Materials Working Group withdrew this proposal in deference to further work in this area as part of the 3R Project.

36 Rare resources: RSC/RareWG/4/rev (Revisions to RDA 3.12 Book format and related terms)

- 36.1 The RSC received and considered the proposal, the responses of the RSC communities, and the revised proposal.
- 36.2 Purpose of the proposal: to revise RDA 3.12, *Book Format*, to revise the term, revise the definition to bring it into greater alignment with contemporary definitions of the concept of format, and to add appropriate terms to the list of format values.
- 36.3 Francis Lapka noted that the Working Group received substantial and helpful input from the RDA communities.
- 36.4 The RSC discussed the term “bibliographic format,” which was strongly supported by Europe but is problematic for ACOC.
- 36.5 Gordon Dunsire asked if this term applied to broadsheets in addition to volumes; Francis Lapka replied that it needs to apply to both.
- 36.6 David Reser asked whether the definition of full-sheet should be “one or more,” and an example of a portfolio with multiple sheets was given by Kate James.

36.7 Francis Lapka will consult the Working Group about the broadsides and full-sheet questions and will send information to the RSC Secretaries for the Sec final document.

ACTION: Francis Lapka

36.8 The RSC accepted the revised proposal as modified per discussion.

36.9 The RSC continued to discuss the proposal via email after the meeting. For the final version of the approved changes, see RSC/RareWG/4/rev/Sec final on the RSC website.

37 Rare resources: RSC/RareWG/5/rev (Revision of RDA 3.21.2.9 Note on extent of manifestation, early printed resources)

37.1 The RSC received and considered the proposal, the responses of the RSC communities, and the revised proposal.

37.2 Purpose of the proposal: to reorganize the instructions and examples in RDA 3.21.2.9 *Early Printed Resources*.

37.3 The RSC accepted the revised proposal with little discussion.

37.4 For the final version of the approved proposal, see RSC/RareWG/5/rev/Sec final on the RSC website.

38 Rare resources: RSC/RareWG/6/rev (Revision of RDA 2.2.2.2 Sources of information)

38.1 The RSC received and considered the proposal, the responses of the RSC communities, and the revised proposal.

38.2 Purpose of the proposal: to revise RDA 2.2.2.2, *Resources Consisting of One or More Pages, Leaves, Sheets, or Cards*; to revise the exception for early printed resources; to simplify the final two paragraphs of RDA 2.2.2.2; to add a reference to RDA 2.17.2.3.

38.3 The RSC briefly continued an earlier discussion of the issue of specific sequences of sources of information but will continue reviewing this issue as part of the 3R Project. The trend seems to be what the Rare Materials Working Group has indicated in this proposal.

38.4 The Rare Materials Working Group withdrew this proposal in deference to further work in this area as part of the 3R Project.

- 38.5 Gordon Dunsire expressed thanks on behalf of RSC to Francis Lapka and the Rare Materials Working Group members for their thoughtful work on these issues.

End of Public Session 5

Beginning of Public Session 6

39 Music resources: RSC/MusicWG/1/rev (Additions and revisions to RDA 7.11, Place and date of capture)

- 39.1 The RSC received and considered the proposal, the responses of the RSC communities, and the revised proposal.
- 39.2 Purpose of the proposal: to add a new instruction to RDA to allow for the recording of *Other Details of Capture*; to revise RDA 7.11.2 to allow for the recording of multiple places associated with capture; to revise RDA 7.11.3 to allow for the recording of multiple dates that are not in a range.
- 39.3 Damian Iseminger submitted a late revision to the proposal (dated 4 November 2016) based on community responses and said that he would explain the changes to the group.
- 39.4 The RSC discussed the concept of “location of capture” and suggested that it could be referred to the Places Working Group if needed; David Reser then noted that because of LRM, everything in RDA related to places would need review. The RSC did not accept the change of “place of capture” to “location of capture.”
- 39.5 The RSC discussed “date of capture,” noting that with LRM all dates mean Timespan. Kathy Glennan noted that for this element multiple sequential dates are sometimes needed. The RSC agreed to leave the wording as “date or range of dates” [deleted later after email discussion because any element is repeatable].
- 39.6 Judy Kuhagen suggested that “Note on...” should be used instead of “Details of...” for this new sub-element.
- 39.7 The RSC accepted this revised proposal as modified per discussion.
- 39.8 The RSC continued to discuss the proposal via email after the meeting. For the final version of the approved changes, see RSC/MusicWG/1/rev/Sec final on the RSC website.

40 Music resources: RSC/MusicWG/2/rev (Additions and revisions to RDA 2.15.3, Plate number for music)

- 40.1 The RSC received and considered the proposal, the responses of the RSC communities, and the revised proposal.
- 40.2 Purpose of the proposal: to revise the scope of RDA 2.15.3, *Plate Number for Music*, so that numbers indicating total number of plates or pages or a number indicating an individual plate or page are considered part of a plate number; to add alternatives to RDA 2.15.3.3 to omit such numbers when recording a plate number.
- 40.3 The RSC accepted Option 1 of the revised proposal, which retains the current instruction as written, with some modifications.
- 40.4 The RSC continued to discuss the proposal via email after the meeting. For the final version of the approved changes, see RSC/MusicWG/2/rev/Sec final on the RSC website.

41 Music resources: RSC/MusicWG/3/rev (Replacement of RDA 6.15 Medium of performance)

- 41.1 The RSC received and considered the proposal, responses of the RSC communities, and revised proposal.
- 41.2 Purpose of the proposal: to replace RDA 6.15 *Medium of Performance*.
- 41.3 Damian Iseminger reviewed the changes in the revised proposal.
- 41.4 The RSC discussed how the examples in 6.15.1.3 should be formatted, whether in an example box, multiple example boxes, or as e.g. statements. Kate James volunteered to do mock-ups so the RSC can see the impact of this decision.
ACTION: Kate James
- 41.5 The RSC discussed the optional omission in 6.15.1.5 and the absence of a similar optional omission at 6.15.1.4; the RSC decided not to remove it from 6.15.1.5 because it is in the current Toolkit.
- 41.6 The RSC discussed the caption in 6.15.1.6; the terms might need to match the order in the instruction. Judy Kuhagen will check the Editor's Guide.
ACTION: Judy Kuhagen
- 41.7 Gordon Dunsire suggested that terms should be included in the RDA Terms vocabulary for any categories named in instructions (e.g., "mallet instrument" in 6.15.1.6.2).
ACTION: RSC Chair/RSC Secretaries

- 41.8 The RSC discussed an alternative approach of using a medium of performance statement. Such a statement could incorporate aspects such as parts, performers, and hands, which are additions to a medium of performance data. This could be a future task for the Music Working Group.
- 41.9 There was some discussion of editorial issues for this proposal, because it is a complete replacement. James Hennelly will need to be consulted. A map will be needed between the old and new instruction numbers.
ACTION: Damian Iseminger/RSC Secretaries/James Hennelly
- 41.10 The RSC accepted the revised proposal with modifications per discussion.
- 41.11 The RSC continued to discuss the proposal via email after the meeting. For the final version of the proposal as modified, see RSC/MusicWG/3/rev/Sec final on the RSC website.

42 Music resources: RSC/MusicWG/4/rev/1 (Revision of RDA 6.28.1.9 and 6.28.1.10, Additions to access points representing musical works)

- 42.1 The RSC received and considered the proposal, responses of the RSC communities, and revised proposals.
- 42.2 Purpose of the proposal: to condense RDA 6.28.1.9-6.28.1.10 into a single instruction for making additions to authorized access points representing musical works.
- 42.3 Damian Iseminger explained that an updated revised proposal was sent on 7 November 2016, superseding the revised proposal sent on 24 October 2016.
- 42.4 The RSC raised concerns about the large number of exceptions, which were carried over from earlier instructions. The group decided that these exceptions should remain for now, but they should be looked at again as part of the 3R Project.
- 42.5 Kathy Glennan asked about the appropriateness of “and/or” in 6.28.1.9. The RSC Secretaries will look into this.
ACTION: RSC Secretaries
- 42.6 The RSC discussed the phrase “in this order” and decided it should be removed from RDA.
- 42.7 The RSC decided to delete the new exception k), which could be added into an LC-PCC Policy Statement.

- 42.8 The RSC accepted the updated revised proposal with modifications per discussion.
- 42.9 For the final version of the proposal as modified, see RSC/MusicWG/4/rev/1/Sec final on the RSC website.

End of Public Session 6

Beginning of Public Session 7

43 Internationalization: RSC/LC/2/rev (Language and script instructions for chapters 6 and 7)

- 43.1 The RSC received and considered the proposal, the responses of the RSC communities, and the revised proposal.
- 43.2 Purpose of the proposal: to add text to RDA 5.4 that would provide an instruction on recording most elements in chapters 6 and 7 in the preferred language and script of the agency creating the data.
- 43.3 The RSC accepted the revised proposal as modified per discussion.
- 43.4 For the final version of the proposal as modified, see RSC/LC/2/rev/Sec final on the RSC website.

44 Internationalization: RSC/ALA/3 (Providing greater flexibility in creating variant access points (RDA Chapters 5, 6, 8, 9, 10, and 11))

- 44.1 The RSC received and considered the proposal and the responses of the RSC communities.
- 44.2 Purpose of the proposal: to change the basis for variant access points for works and expressions in RDA chapters 5 and 6 from a “variant title for the work” to “a title for the work;” to change the basis for variant access points for persons, families and corporate bodies from “a variant name for the [person/family/corporate body]” to “a name of the [person/family/corporate body];” to update related references and instruction names in the text.
- 44.3 Kathy Glennan said that this proposal came from the realization that catalogers were doing things not sanctioned by RDA. The use of different qualifiers for name of person is not accounted for now, nor are alternative thematic indexes or numbering in variant titles.
- 44.4 A Fast Track proposal to revise instruction 6.2.3.3 to allow for greater flexibility in recording variant titles, as noted in the LC response, should be submitted.

ACTION: David Reser

- 44.5 Gordon Dunsire pointed out that this is part of a larger discussion about flexibility in access points.
- 44.6 The RSC decided that this was worth doing now because it paves the way for the changes expected in the 3R Project. It would not have a strong impact on most users.
- 44.7 The RSC agreed to the wording “Include additional elements in the variant access point as appropriate” as a change in all appropriate instructions and as an addition where that paragraph is lacking in some instructions.
- 44.8 The RSC had a broad discussion about preferred and variant names and authority control. Past practice had a focus on putting strings together; we now think in terms of pieces of data. Guidance will need to be given in the 3R Project within Nomen and Agent.
- 44.9 William Leonard noted that instructions 6.0, 9.0, 10.0, and 11.0 need to be revised to indicate why variant access points are made; only authorized access points are discussed there now.
- 44.10 The RSC accepted the proposal with modifications per discussion.
- 44.11 For a final version of the proposal as modified, see RSC/ALA/3/Sec final on the RSC website.

45 Internationalization: RSC/TechnicalWG/2 (RDA 9.2: Addition of elements for Given name and Surname)

- 45.1 The RSC received and considered the proposal and the responses of the RSC communities and Working Group.
- 45.2 Purpose of the proposal: to propose the addition of *given name* and *surname* as sub-elements of RDA *name of the person*.
- 45.3 Gordon Dunsire introduced this paper, commenting that the Working Group knew that given name and surname were not universal constructs, but are useful in Western authority control systems to provide precision. While these elements might be useful for some communities, their implementation must be balanced against bias.
- 45.4 There was general agreement by the RSC with recommendation 1.

- 45.5 There was general agreement by the RSC that further review of the semantics and in context with Nomen is needed for these proposed elements (recommendation 2).
- 45.6 There was general agreement by the RSC to add both patronymic and matronymic as separate sub-elements of name of person, to complement given name and surname (recommendation 3). Kathy Glennan noted that ALA wants matronymic added now; however, others in the group cautioned about complexity and cultural issues underlying patronymic, matronymic, and surname. An observer said that this would be complicated and difficult to manage for the whole world, and decisions may be needed country by country. It was suggested that avoiding matronymic/patronymic in favor of direct order/inverted order might be a more elegant way to move forward.
- 45.7 There was general agreement by the RSC that recommendation 4 required further review.
- 45.8 Gordon Dunsire commented that in some ways this could be considered a trial proposal, and it is not necessary to go ahead with implementation now. It might be possible to liaise with others working in this area (e.g., IFLA Cataloguing Section). Others noted that the library community is not the only one facing these issues; there might be something useful from people working with passports or for from ISO.
- 45.9 This proposal was not accepted. It is referred for consideration as part of the 3R Project, specifically as part of the work on the Nomen entity.

End of Public Session 7

Beginning of Public Session 8

46 Briefing paper: RDA technical terminology

- 46.1 Gordon Dunsire described some of the technical terminology problems that led to the preparation of this briefing paper, which is intended for the internal use of the RSC. The briefing paper, prepared by Gordon Dunsire, Ebe Kartus, and Judy Kuhagen at RSC's request, is in effect a thesaurus or translation device between terms and their usage in various related standards. [See report in the appendix for public minutes.]
- 46.2 RSC found the paper helpful, and suggested that it would be valuable to make this more broadly available to catalogers, to "bring them along with us." It would be especially useful for non-English speakers.

- 46.3 Gordon Dunsire observed that there are several audiences that might find such a document useful: the RSC, RSC communities, end users, and developers.
- 46.4 The group suggested that more terms should be added, for example, general terms such as “literal,” “datatype,” and “application profile,” as well as terms from LRM, 4-fold path, and other cultural heritage communities. Gordon Dunsire would like to ensure that every non-common noun has an RDA glossary definition.
- 46.5 RSC recommended that the entire document should be translated sooner rather than later.
- 46.6 Suggested locations for storing and accessing a broader document included Toolkit, RDA Registry, and the RSC website.
- 46.7 The briefing paper recommends adding missing terms into the RDA Terms vocabulary. Gordon Dunsire cautioned against adding everything into that vocabulary; it might be easier to manage and to share if it were a separate document.
- 46.8 There is some pressure to move ahead with a broader document for all four audiences, but particularly for the technical audience in the RDA Registry. Ebe Kartus pointed out that there is also pressure for cataloguer-friendly language. This broader document may be particularly useful in communicating information from the 3R Project.
- 46.9 Ebe Kartus reminded the group that RDA must be neutral regarding encoding. In response to concerns about including linked data terminology, Gordon Dunsire described the specific instructions of the (then) Committee of Principals to shift the RDA model on to the RDF structure. RDF is a universal structure that applies in multiple situations and is not an encoding format. This change has not yet been effected in Toolkit.
- 46.10 RSC agreed that the originating group (Gordon Dunsire, Ebe Kartus, Judy Kuhagen, with the addition of Linda Barnhart) can carry this briefing paper forward to be ready for all four audiences no later than Feb. 2018. They will add missing terms and come up with acceptable definitions. A column could be added to the first table for LRM. Decisions can be made about which terms to add to the RDA Terms vocabulary; the need for a separate vocabulary can be discussed via email with RSC.
- ACTION:** RSC Chair/RSC Secretaries/Ebe Kartus

47 Updated Standard ISO 5127-2016 -- Foundation and vocabulary of information and documentation

- 47.1 This topic was added to the agenda during the meeting.
- 47.2 The RSC welcomed Axel Ermert, Scientific Researcher at the Institut für Museumsforschung, Staatliche Museen zu Berlin, who reported to the meeting on the updated edition of *ISO 5127-2016, Foundation and vocabulary of information and documentation* from ISO/TC 46, the Technical Committee on Information and Documentation.
- 47.3 This standard began in 1970 and the most recent edition was 2001. It has now been updated to include terms from information science, scientific communities, archives, museums, and special collections; the standard includes about 2,000 terms. English, French, and Russian are the official languages for ISO; the 2001 edition was translated into 11 languages. Terminology should be multilingual; all should be able to approach the same technical state regardless of language. The updated standard is expected to be published in March-April 2017.
- 47.4 Axel Ermert invited RSC to consider submitting RDA terms/definitions to the ongoing development of the ISO standard. The Technical Committee would like to work together and to harmonize definitions and concepts as much as possible. The Technical Committee could provide their terminology for RSC's use; a draft could be shared.
- 47.5 It was observed that Google welcomes input about translations, especially for technical matters. It might be a contribution to the greater good to make them aware of the existing translations of the RDA Registry. This might mean adding Google to our list of developers to notify when updates are made. RSC agreed to pursue this if it does not mean more work.
ACTION: RSC Chair/RSC Secretaries
- 47.6 The Technical Committee would like to establish a formal liaison with RSC to keep each other informed and make it easier to exchange information. RSC will discuss the idea of a liaison and protocol on Friday. [Was not further discussed.]
ACTION: RSC Chair

48 Records in Context draft from ICA Experts Group on Archival Description

- 48.1 Gordon Dunsire described this document from the archival community as an attempt to standardize their methods of documentation and description of resources. It is an early draft that is not intended for worldwide review; however, the ICA Experts Group contacted Gordon and asked for advice.
- 48.2 Gordon Dunsire noted that the Records in Context (RiC) concepts to record, record set, and record component would be of interest to the Aggregates Working Group.

- 48.3 Mirna Willer noted that the archival community's perspective is shifting from hierarchical structure to community archiving, a result of influence from Australian and South African colleagues.
- 48.4 The RSC should review the document and provide comments on the RSC-RDA email list by 25 November. Overall impressions are fine; no detail is required. Mirna Willer recommends reading the introduction. Gordon will then consolidate comments and respond to ICA by 31 December, with a quick review by RSC [date later changed to 31 January].
ACTION: RSC/RSC Chair

End of Public Session 8

Beginning of Public Session 9

49 Liaisons with other standards

- 49.1 The RSC acknowledged the reports submitted by the liaisons with other standards groups and received verbal updates as follows. [See the reports in the appendix for public minutes.]
- 49.1.1 ISSN International Centre (reported by Gordon Dunsire) is actively engaged with much that RDA is doing, directly or indirectly.
- 49.1.2 FRBR Review Group (reported by Barbora Drobíková) managed the commenting process for the LRM draft and the subsequent incorporation of those comments into a subsequent draft. The group expects approval in April 2017 for the IFLA LRM final draft by the IFLA Committee on Standards.
- 49.1.3 ISBD Review Group (reported by Massimo Gentili-Tedeschi) intends to align with IFLA LRM this year, and formally invited RSC to take part in this alignment work. Anyone on RSC interested in membership on the ISBD Review Group should contact him. They hope to use the transition tables if they are ready, and that the process will be a quick one.
- 49.1.4 Library of Congress Network Development and MARC Standards Office was extended an invitation to this meeting, but no response or written report was received.
- 49.1.5 Permanent UNIMARC Committee (reported by Maria Inês Cordeiro) also intends a larger alignment in the context of LRM. Another future issue is finalizing the UNIMARC in RDF project, which is an effort to input into the Open Metadata Registry every combination of tag, indicator, and subfield in the bibliographic format.

49.1.6 Gordon Dunsire reported briefly on a meeting held on Tuesday, November 8, 2016 about music medium of performance vocabularies (UNIMARC, Music Library Association, and Doremus). An effort, led by Damian Iseminger, will be made to bring these vocabularies together through mappings. The RDA medium of performance vocabulary was recently deprecated in the Open Metadata Registry.

49.1.7 PRESSoo (reported by Gordon Dunsire) seeks to establish a formal relationship with RSC. This relationship would be particularly useful to RSC in aggregates work. The PRESSoo standard was published in its final form on the IFLA website.

ACTION: RSC Chair

49.2 Axel Ermert suggested that RSC look into establishing a liaison and protocol with CIDOC, the International Council of Museum's International Committee for Documentation, which would facilitate alignment in both directions.

ACTION: RSC Chair

49.3 Gordon Dunsire noted that neither RSC nor its liaisons have updated the shared documents recently. The groups should probably review them. From the RSC perspective, the relationships and protocols are working well.

ACTION: Liaisons/RSC Chair/RSC Secretaries

50 IFLA LRM and possible collaboration

50.1 The RSC was joined by Pat Riva, Chair of the FRBR Consolidation Editorial Group and one of the architects of LRM, via telephone/webcam.

50.2 Gordon Dunsire summarized the RSC plan to adopt and fully align with LRM. RDA will be an instantiation of the model, perhaps one of the primary instantiations of the model. New entities will be added to RDA as well as additional ways of creating bibliographic information, including the 4-fold path. The RDA Toolkit will be re-structured, which will provide the opportunity for alignment with LRM. The RSC will begin with a macro structure and will then disaggregate and re-aggregate instructions, as well as add general guidance and principles. Normal consultation processes cannot be followed during this period (write/review/re-write/review) due to time pressures, and the RSC is looking for different ways to engage the communities and Working Groups. RSC intends to keep communities informed, but the process cannot be business as usual.

50.3 Pat Riva described the next steps in the finalization process for LRM. No substantive changes to the standard are expected as it works its way through the formal IFLA process.

- 50.4 Gordon Dunsire said that RSC will take the risk that there will not be substantive changes and will start alignment work before the final publication of the standard. He asked about plans for alignment with other standards.
- 50.4.1 ISBD is waiting to have a workable version of LRM. Since a mapping already exists, they hope their work will go quickly. They intend to organize a Working Group for this task, and invite RSC to take part.
- 50.4.2 UNIMARC will look into LRM in 2017. Most likely they will accept the standard as it is now and begin analyzing it, hoping that it will not change significantly.
- 50.4.3 ISSN is observing the activities of others and wishes to engage but does not yet know exactly how to engage.
- 50.4.4 Other specialized standards (Descriptive Cataloging of Rare Materials and Music Library Association Best Practices) will align with RDA, so they will align with LRM through RDA. The Croatian cataloging rules, which include libraries, archives, and museums, are looking at Records in Context as well as LRM to see what accommodates their needs best.
- 50.5 Gordon Dunsire clarified that the FRBR Review Group is thinking of publishing the LRM also as a set of linked data element sets and a linked data mapping. Pat Riva agreed, and talked about the need for support for standards infrastructure. RSC could write a letter of support and send it either directly or through its protocols; Gordon Dunsire asked for advice on which individuals and groups should receive it.
ACTION: RSC Chair
- 50.6 Gordon Dunsire and Pat Riva talked more about LRM and linked data. LRM will have an element set, or possibly the classes separate from the entities and relationships, but will not have any concept vocabularies. Pat believes that it is safer and cleaner not to re-use the FRBR/FRAD entities and so will create new entities; it will be better to make a full set of LRM classes and then map back to FRBR. Gordon commented that when RDA first started looking at linked data, the decision was taken not to use IFLA URIs but instead to make RDA URIs (and then map). Since then, other groups have decided this is a safer course of action. RSC will continue its current policy and then map to the LRM namespace when it is established.
- 50.7 With the exception of Person, RSC thinks there will be no difficulty fitting existing LRM entities into RDA. RDA will need to deprecate the current Person entity due to a significant change in the definition. The RDA Registry will need to increment the version number when the current Person is deprecated and new Person is added because this is not backward-compatible. RDA will want to keep

Family and Corporate Body as subclasses of Collective Agent because Family is important for archives.

ACTION: RSC Chair/RSC Development Team

- 50.8 Ebe Kartus asked what will happen with FRBR, FRAD, and FRSAD? Pat Riva responded that they will be considered previous models and will not disappear from the IFLA website. These documents need to be available to researchers and for slow transitions. They will move to the list of previous standards when LRM is officially approved by IFLA. They cannot be considered superseded yet.
- 50.9 Mirna Willer asked about provenance information and other administrative metadata. Pat Riva does not see the Review Group going into that area, and suggested it could be an extension to LRM. These data are determined by local systems.
- 50.10 Ebe Kartus wondered if there could be a central place for mappings where people—especially vendors—could be pointed. It was agreed that there needed to be a more stable and formal infrastructure. Concern was expressed that vendors do not appear to be aware of LRM, nor do other major players.
- 50.11 Gordon Dunsire reminded the group that data can be added to the Open Metadata Registry with various approval statuses. He suggested publishing new elements, properties, and maps when appropriate, as well as developing and publishing documents, such as alignments. He advises that we all keep each other informed about schedules, and provide mutual assistance when we can to move forward on as common a front as possible.
- 50.12 Gordon Dunsire thanked Pat Riva and representatives of other standards groups for their input into this discussion.

End of Public Session 9

Beginning of Public Session 10

51 Outstanding business from this meeting

- 51.1 There was no outstanding business.

52 Unresolved Fast Track entries

- 52.1 There were two unresolved Fast Track entries from the October 2016 release: illustrative content (planned for the April 2017 release but actually done in February; see 15.7 and 28.1-28.3) and range of dates (deferred).

52.2 The deadline for new Fast Track proposals for the February 2017 release is 25 November. RSC will use the usual process of sharing email messages with the RSC-RDA list (not duplicating in VLE); there is a new Fast Track log in Google Drive for posting entries. The deadline for comments on all the Fast Track proposals is 16 December.

ACTION: RSC/RSC Secretaries

53 “Outcomes” from this meeting

53.1 Items included by tradition in the Outcomes document are general information about the meeting at the beginning and a picture of RSC.

53.2 A version of the Outcomes document will be sent to the *IFLA Metadata Newsletter*, which has a deadline of 28 November for the next issue.

ACTION: RSC Secretaries

53.3 Notable outcomes to be communicated included:

- The decision that RSC will adopt IFLA LRM with implementation in the April 2018 Toolkit release. List the major changes and anticipated impact. Announce the LRM decision separately at the same time as the Outcomes document.
- The outline, schedule, and expectations for the 3R Project, as well as a timetable for future releases. RSC intends this to have minimal impact on current cataloging practice, and will also provide different ways of doing things. RSC will provide a mapping between numbering systems. This RDA will be a new expression, not a new work.
- Community engagement during the restructure process.
- Progress reports will be frequent from RSC.
- The process for Toolkit users to follow if they are finding problems, and how they will be resolved during the restructure period.
- The working principle and how it has changed related to the 3R Project.
- Internationalization: acknowledge the breadth of observers; much expertise in the room.
- Show the effectiveness of moving to the new governance structure
- Provide a table for all proposals with their outcomes. Highlight the success of papers produced by two Working Groups, demonstrating the future working model.

54 Any other business?

54.1 The RSC warmly thanked the Deutsche Nationalbibliothek for their hospitality.

54.2 Gordon Dunsire presented certificates of appreciation to Renate Behrens, Cinzia Bufalino, and Edith Röschlau, in gratitude for their excellent work in arranging the meeting.

- 54.3 Judy Kuhagen was recognized with a certificate of appreciation and gifts from the RSC for her outstanding service to the committee.
- 54.4 Gordon Dunsire thanked the RSC, Working Group Chairs, and all observers before the RSC took a brief tour of the DNB and then moved into Executive Session.

End of Public Session 10

End of Public Session

Beginning of Executive Session

- 55** Issues from Executive Sessions 1-3
- 56** Next meeting in 2017
- 57** Action items from the meeting
- 58** Other issues from the week's discussions

End of Executive Session

End of 2016 RSC Meeting

Appendix for Public Minutes

The following reports were submitted, via the Chair of RSC, to the RDA Steering Committee for its meeting in November 2016 in Frankfurt, Germany.

Agenda item #19:

Report of the RSC Chair
2016 Report of the RSC Secretary and Secretary-Elect
2106 Report of the RDA Examples Editor

Agenda item #20:

Reports of RSC Working Groups

- Aggregates
- Capitalization Instructions
- Fictitious Entities
- Music
- Places
- Rare Materials
- RDA/ONIX Framework
- Relationship Designators
- Technical
- Translations

Agenda item #21:

Reports from Liaisons with External Groups

- FRBR Review Group
- ISBD Review Group
- ISSN International Centre
- ONIX

Agenda item #46:

RDA Technical Terminology briefing paper

Agenda item #49:

Reports from Liaisons with Other Standards

- ISBD Review Group Annual Report 2015-2016
- Activity Report from ISSN International Centre

Appendix for Public Minutes

Report of the RSC Chair

This report covers the period November 2015-October 2016.

Outreach and liaison activities

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

- 24 Nov 2015: CILIP Linked Data Executive Briefing, London, England. Presentation on “RDA for linked data”.
- 8-12 Jan 2016: American Library Association Midwinter conference 2016, Boston, Mass, USA. Presentation on “Beyond Thing-athon: RDA in the field” to Thing-athon (a local jane-athon). Presentation on “RDA progress on governance and strategy” to RDA Forum. Presentation on “RDA data capture and storage” to CC:DA.
- 14 Apr 2016: Cervathon, Biblioteca Nacional de España, Madrid (a local jane-athon). Presentation on “RSC strategy and RDA internationalization”.
- 15 Apr 2016: Una cita en la BNE: RDA y datos enlazados, Biblioteca Nacional de España, Madrid. Presentation on “RDA and linked data”.
- 19 Apr 2016: 22nd Annual Conference and Exhibition of the Special Libraries Association/Arabian Gulf Chapter, Kuwait. Presentation on “RDA in a non-MARC environment”.
- 27 Apr 2016: Code4Lib Ottawa meeting, MacOdrum Library, Carleton University, Ottawa, Canada. Presentation on “RDA and linked data”.
- 28 Apr 2016: Thematic Seminar on Resource Description and Access, Library and Archives Canada, Ottawa. Presentation on “RDA and semantic data”.
- 2 May 2016: RDA seminar for staff, Bibliothèque nationale de France, Paris. Presentation on “Marathon RDA”.
- 9 May 2016: Selmathon 1, Royal Library, Stockholm, Sweden (a local jane-athon). Presentation on “RDA and linked data”.
- 10 May 2016: Selmathon 2, Royal Library, Stockholm, Sweden (a local jane-athon). Presentation on “RSC strategy and RDA internationalization”.
- 23 May 2016: EURIG seminar, National Library of Latvia, Riga. Presentation on "IFLA FRBR-Library Reference Model and RDA".
- 27 May 2016: Seminar, Casalini Libri, Fiesole, Italy, Presentation on "RSC strategy".
- 23-28 Jun 2016: American Library Association Annual conference 2016, Orlando, Florida, USA. A presentation on "RDA: international linked data for cultural heritage resources" to ALCTS session "Linked data - globally connecting libraries, archives, and museums".

Presentation on "What does RDA linked data look like and how does it benefit users?" to RDA Forum. Presentation on "RDA internationalization and application profiles: applying the global to the local" to CC:DA.

- 11 Aug 2016: IFLA Satellite meeting "RDA in the wider world", Dublin, Ohio, USA. Presentation on "RDA work plan: current and future activities".
- 15 Aug 2016: World Library and Information Congress: 82nd IFLA General Conference And Assembly, Columbus, Ohio, USA. Presentation on "Instructions, interfaces, and interoperable data: the RIMMF experience with RDA" to the joint Cataloguing Section and Information Technology session.
- 1 Sep 2016: CIG Conference 2016, Swansea, Wales. Presentation on "Future directions for RDA".
- 12 Sep 2016: CIGS seminar Metadata and Linked Data: projects, experiments and services in libraries, Edinburgh, Scotland. Presentation on "RDA data, linked data, and benefits for users".
- 29 Sep 2016: Fobid Studiedag "Standaardisatie: keurslijf of kans?", Royal Library, Den Haag, The Netherlands. Presentation on "RDA, linked data, and development", and presentation introducing the Multa-thon (a local jane-athon).
- 14 Oct 2016: Seminar on RDA standard – benefits and problems related to its implementation, Warsaw, Poland. Presentation on "Where is RDA in the bibliographic universe?".

Links to presentations are available at <http://www.gordondunsire.com/presentations.htm>

The RSC Chair participated in local jane-athons held in:

- Boston, USA (Thing-athon)
- Madrid, Spain (Cervathon)
- Stockholm, Sweden (Selmathon 1 and 2)
- Riga, Latvia (Rigathon)
- Orlando, USA (Lang-athon)
- The Hague, The Netherlands (Mult-a-thon)

The RSC Chair, ALA representative, and ALA Publishing representative participated in an American Libraries Live webinar in February 2016 (<http://americanlibrarieslive.org/blog/archive-rda>).

The RSC Chair attended the following meetings:

- 9 Jan 2016: Ad hoc meeting of RSC Aggregates Working Group, Boston, USA.
- 11 Jan 2016: RDA Technical Forum, ALA Midwinter 2016, Boston, USA.
- 15 Apr 2016: Meeting with BNE development staff, Madrid, Spain.
- 20 Apr 2016: Meeting with Arabic translators, Kuwait.

- 25-27 Apr 2016: RDA Board, Ottawa, Canada.
- 3 May 2016: Meeting with BnF development staff, Paris, France.
- 23 May 2016: Ad hoc meeting of RSC Aggregates Working Group, Riga, Latvia
- 23 May 2016: Ad hoc meeting of RSC Technical Working Group, Riga, Latvia
- 26 May 2016: Meeting with Casalini Libri development staff and associates, Fiesole, Italy.
- 27 Jun 2016: RDA Technical Forum, ALA Annual 2016, Orlando, USA.
- 13-18 Aug 2016: Meetings of the Cataloguing Section, FRBR Review Group, ISBD Review Group, LIDATEC, Linked Data SIG, and Permanent UNIMARC Committee, IFLA 2016, Columbus, Ohio, USA.
- 19 Aug 2016: FRBR Review Group meeting on FRBR-LRM, Columbus, USA.
- 7 Sep 2016: CILIP/BL Committee on RDA, London, England

The RSC Chair also participated in online meetings of:

- RDA Board
- PCC Task Group on URI in MARC

The RSC Chair authored the following publications related to RDA:

- Towards an internationalization of RDA management and development. In: JLIS.it Journal of Library and Information Science. Italy, vol. 7, no. 2, (2016), pp. 307-330.
- Instructions, interfaces, and interoperable data: the RIMMF experience with RDA. Co-authored with Deborah Fritz and Richard Fritz. IFLA Library.

Links to publications are available at <http://www.gordondunsire.com/publicationsrecent.htm>

Administration and development activities

The RSC Chair participated in online meetings of:

- RDA Development Team
- RDA Translations Working Group
- CILIP VLE staff
- RSC Secretary recruitment team

The RSC Chair liaised with ALA Digital Reference and the RDA Development Team in the development of the RDA content management infrastructure for the August 2016 release of RDA Toolkit, following the RDA Board meeting. The RSC Chair oversaw the consolidation and publication of the master RDA Reference vocabularies using Fast Track processes for proposals developed with the RSC Secretary. The RSC Chair and RSC Secretary carried out testing of the RDA Reference maintenance processes with live changes to data.

The RSC Chair liaised with ALA Digital Reference, the RDA Development Team, and the RSC Translations Working Group on developing the infrastructure for maintaining translations of RDA Reference. The RSC Chair acts as the primary contact for translations of RDA Reference in the OMR during the transition to the new structure of the RSC.

The RSC Chair chaired the working groups:

- RSC Places Working Group
- RSC Relationship Designators Working Group
- RSC Technical Working Group

The RSC Chair is participating in the development of a linked data version of the IAML/UNIMARC Medium of performance vocabulary.

Submitted by: Gordon Dunsire, Chair, RSC
Date: 20 October 2016

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2016 Report of the RSC Secretary and Secretary-elect*

After the November 2015 meeting:

- monitored/managed the comments on the revised proposals and 20 Sec final drafts of approved proposals (some Sec final drafts in revised versions)
- posted Sec final documents on RSC website
- updated the Actions document on Google Drive and sent reminders to RSC about deadlines
- prepared public and restricted versions of meeting minutes
- prepared certificates of appreciation for Chair's signature
- helped Chair prepare drafts of meeting outcomes and annual report
- worked with Chair to rename and revise as needed the Chair and Policy documents due to new names of the Board and the Committee and other changes

To update the RDA content via February, April, August, and October releases of RDA Toolkit:

- coordinated the Fast Track log process
- collected corrections from RSC, translators, and Toolkit users
- received example revisions from the RDA Examples Editor
- identified changes needed for editorial consistency
- made changes to 327 instructions/examples resulting from approved Fast Track and Fast Track Plus entries, corrections, example revisions (not including instructions revised for

editorial consistency); beginning with August release, corrections and example revisions are not included in the Sec series of Fast Track documentation

- for the April release, prepared the changes from the 20 Sec final versions of approved proposals
- with RSC volunteers, proofread changes on stage site and in pdfs from that site
- updated the element analysis table after the April and August releases of RDA Toolkit
- participated in test of VLE software for potential Fast Track process improvement
- tested the updating of OMR content for the April release by modifying csv templates downloaded from metadataregistry.org
- with Chair, carried out analysis and editing of OMR content for element sets and value vocabularies resulting in addition, deprecation, or revision of nearly 900 entries
- with Chair and Jamie Hennelly, planned inclusion of Glossary definitions/scope notes in Glossary for August release and also in scope/terminology instructions and appendices I-K for October release
- assisted Chair with preparation of Fast Track Plus proposals for the August release and documented changes in RSC/Sec/4
- prepared audit trail spreadsheets for August and October releases to document element and vocabulary changes in the OMR (Sec-elect)

To communicate with cataloguing communities:

- posted documents (proposals, discussion papers, responses to documents, policy documents, Chair and Sec documents) on RSC website
- posted announcements on RSC website
- sent emails about documents and announcements to a specific group of RDA colleagues and RSC, to RDA-L, CATSMAIL (list of IFLA Cataloguing Section), EURIG's list, list of Program for Cooperative Cataloging, and to other lists as appropriate (e.g., BIBFRAME)
- submitted article "RDA content in multiple languages" to *Italian Journal of Library, Archives, and Information Science*

As member of the Translations Working Group:

- monitored email communications with the Working Group and advised on editing issues

As member of the RDA Development Team:

- participated in Go-To-Meeting sessions about RDA Reference, hack-athons, and other development issues
- attended meeting of the team during the ALA Midwinter Meeting
- reviewed spreadsheets and other documents for metadataregistry.org and rdaregistry.info
- assisted with registration and other arrangements on day of hack-athon preceding the ALA Midwinter Meeting; attended the Selma-thon in Stockholm in May
- participated in discussions about Toolkit restructure/redesign process and timetable

- reviewed IMLS grant proposal for further RIMMF development

Assisted in planning for 2016 meeting:

- initiated arrangements for hotel and travel with ALA Publishing staff member
- planned meeting logistics in collaboration with local hosts and with RSC
- posted announcements about meeting and observers on RSC website
- developed agenda with Chair and Sec-elect
- sent information about meeting to observers
- prepared listing of instructions cited in proposals, discussion papers, and responses (Sec-elect)
- assisted Chair with preparation of various briefing papers and proposals

Involved in transition to successor for the RSC Secretary position:

- participated in recruitment process (position description, review of applications, interview)
- developed training materials, procedures, calendar of activities, etc., for Sec-elect
- for Sec-elect, reviewed assigned tasks, shared information, and answered questions on daily basis
- with Sec-elect, held two training Go-To-Meeting sessions and, with Jamie Hennelly, an in-person two-day meeting in Chicago

Contributed to planning for transition to new governance:

- reviewed and posted documents about Board and RSC recruitments
- prepared draft survey for RDA Board to assess RDA uptake/planning at national libraries (Sec-elect)

Submitted by: Judith Kuhagen, Secretary, RSC

Date: 15 October 2016

* Linda Barnhart (Sec-elect) appointed in late July; she has participated in many of the tasks since that time; inclusion of “(Sec-elect)” at end of a task indicates she had sole responsibility

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2016 Report of the RDA Examples Editor

Examples for Approved Proposals

The RDA Examples Editor provided examples for approved proposals. Many individuals helped her with languages and special types of works. In particular, Damian Iseminger, chair of the RSC Music Working Group, and Kathy Glennan, ALA Representative, provided much background information and feedback for music examples.

Examples for Toolkit Releases

For the 2016 Toolkit releases, example additions, deletions, and corrections (excluding those from proposals) were made in the following chapters: 2-3, 5-9, 11, 17, 19-20, 24, an Appendix E. In addition to those changes initiated by the Examples Editor, changes were prompted by RSC members, emails from the RDA Toolkit Feedback feature, RDA translators, and catalogers using RDA. The long-term project to revise examples to follow the basic instructions about including initial articles in titles of works was completed with the April 2016 Toolkit release. Beginning with the August 2016 Toolkit release, example revisions are no longer routinely included in the RSC/Sec documents that list Fast Track entries and other revisions.

Toolkit Website Examples

Both the authority and the bibliographic complete examples were updated in April 2016. MARC format and RDA changes were incorporated. A new type of example was added to the Toolkit website in April. These examples are diagrams showing RDA entities, elements, and relationships. The first two examples in this new format showed 1) primary relationships for the novel *Harry Potter and the Order of the Phoenix* and 2) a person that has an alternate identity. In October two more examples showing work relationships were added: 1) an example showing adaptations related to the musical *Cabaret* and 2) an example showing whole-part relationships.

Submitted by: Kate James, RDA Examples Editor

Date: 14 October 2016

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Reports to the RDA Steering Committee 2016: Working Groups

Aggregates Working Group

To: Gordon Dunsire, RSC Chair
From: Deborah Fritz, Chair, RSC Aggregates Working Group
Subject: RSC Aggregates Working Group 2016 Report to the RSC

The current Membership and Tasks of the RSC Aggregates Working Group are published as [RSC/Chair/9/2016](#). The current Terms of Reference for the Group are published as [RSC/Chair/9](#). As per the latter document, “The group is charged to: Assist the RSC in developing RDA for application to aggregated resources.”

The Group liaised on related tasks with: Pat Riva, co-author of the 2016-02-21 draft of the “FRBR-Library Reference Model”; the Chair of the RSC Technical Working Group; the RDA Development Team.

Submission to RSC

The Group submitted one discussion paper for the RSC meeting in November 2016:

- [RSC/Aggregates/WG/1](#) (Discussion paper: RDA and WGA treatment of aggregates)

Status of tasks

1. Investigate the issues for developing *RDA* instructions and elements for aggregate resources, building on [6JSC/AggregatesWG/1](#), and prepare a proposals/discussion paper by Aug. 1, 2016.

Status: **RSC/Aggregates/WG/1 discussion paper submitted.** Preliminary discussions were solidified during an intense week of 9 brainstorming sessions (1-2 hrs each) held twice a day (to accommodate members from Europe and Oceania). Pat Riva attended 5 of these sessions, and contributed greatly to our thinking, and the group very much appreciates her input.

1.1. Review RDA compliance with the models presented in the main part and appendix of the Final Report of the Working Group on Aggregates.

Status: **In progress:** the AWG has analyzed the models presented in the Final Report of the Working Group on Aggregates and has begun work on reconciling those models with the concepts provided in the FRBRoo model.

1.2. Investigate the utility of FRBRoo sub-classes of Work, Expression, and Manifestation for the description of aggregates in *RDA*.

Status: **In progress:** the AWG is finding the concepts of the FRBRoo classes and sub-classes very useful for thinking about aggregates.

1.3. Test the two examples in [6JSC/AggregatesWG/1](#) in liaison with EURIG.

Status: **In progress:** the AWG included the two examples from [6JSC/AggregatesWG/1](#) in its 2016 discussion paper, and will seek responses from EURIG about these examples and others.

1.4. Investigate issues raised in [6JSC/EURIG/Discussion/2](#) and [6JSC/EURIG/Discussion/3](#).

Status: **In progress:** the AWG has begun analysis of the issues raised in the two EURIG discussion papers, and will address those issues once we are sure that we are on the right track with our proposed model.

2. Recommend how to incorporate issues raised in [6JSC/DNB/Discussion/1](#) in RDA

Status: **Not yet begun.**

3. Investigate a new element for the type of aggregation, for example complete works, top ten compilations, best-of compilations, categories based on accrual parameters, etc.

Status: **Not yet begun.**

4. Prepare a paper on use cases for [6JSC/BL/Discussion/1](#) in liaison with EURIG.

In progress: the AWG has begun analysis of the issues raised in [6JSC/BL/Discussion/1](#), and will address those issues once we are sure that we are on the right track with our proposed model.

5. Liaise with the RSC Music Working Group and RSC Technical Working Group on issues of mutual interest.

5.1. Investigate instruction/potential changes to the instructions at 6.2.2.9.1 raised in question #10 in [6JSC/MusicWG/Discussion/1](#).

Status: **Not yet begun.**

5.2. Follow up on [6JSC/ALA/41](#) with the RSC Technical Working Group.

Status: **Not yet begun.**

Additional projects

In addition to the above, the AWG also:

- Held informal, in-person meetings of various group members and other interested parties at:
 - ALA Midwinter (Boston, January, 2016)
 - EURIG meeting (Riga, May, 2016)
- Worked on and submitted contributions the RSC response to the world-wide review of LRM (March-April, 2016)

The AWG Chair has participated in 7 “[X-athons](#)” between the 2015 and 2016 RSC meetings, and in each of those events the complexities of dealing with compilations has been an unresolved issue. European participants particularly struggle with relating creators of added content to new expression data for the augmented work embodied in an aggregation manifestation. The participants expressed relief to hear that the RSC is very aware of aggregation issues.

RSC Capitalization Instructions Working Group

Report to RSC November 2016

Following the transition to the RSC, the charge and current membership and tasks of the Capitalization Instructions Working Group were reissued on 28 January and 7 March 2016 respectively. See:

<http://www.rda-rsc.org/sites/all/files/RSC-Chair-8.pdf>

<http://www.rda-rsc.org/sites/all/files/RSC-Chair-8-2016.pdf>

Additional task

At the Edinburgh meeting the Working Group was asked to examine the English version of an interim update to A.39 (Finnish capitalization instructions) for publication in the special 9 December 2015 release in which the Finnish translation of RDA was published. These updates were prepared by the Finnish translation team and required for the implementation of RDA in Finland. The Working Group proposed some standardization to the formulations of the instructions to ensure consistency of style with the current Appendix A instructions in other languages.

Status of tasks

The Working Group has a single task, detailed in two sub-tasks:

1. Review the content and coverage of RDA Appendix A and prepare a proposal/discussion paper by Aug. 1, 2016.
 - 1.1. Review the instructions on capitalization of RDA elements (A.0-A.9) to identify gaps and make recommendations to ensure these are complete.
 - 1.2. Identify updates needed in specific languages, where the relevant expertise for that language is available, and create mock-ups for languages.

Unfortunately, the Working Group was not able to prepare a paper for this proposal cycle.

After the RDA satellite conference to the IFLA WLIC in Columbus, four members of the Working Group met informally and discussed a partial inventory of existing capitalization instruction formulations prepared by the chair.

Members have confirmed their willingness to continue to serve, and to produce a discussion paper/proposal for 2017.

Submitted by

Pat Riva

Chair, Capitalization Instructions Working Group

10 October 2016

Fictitious Entities Working Group

To: Gordon Dunsire, Chair, JSC
From: Amanda Sprochi, Chair, JSC Fictitious Entities Working Group
Subject: RSC Fictitious Entities Working Group: 2016 annual report

The RSC Fictitious Entities Working Group has been making slow progress in examining the issues surrounding the use of fictitious (and non-human) persons, families, and corporate bodies in RDA in light of the new FRBR-LRM which is expected to be ratified sometime in the coming year.

The Working Group has been meeting virtually through email and the Google docs application to discuss the implications of the new FRBR-LRM and some cases studies that may be of use to elucidate the methods by which fictitious entities may be included in bibliographic records while adhering to the FRBR-LRM definitions of "persons" and "creators." Work this year has concentrated on:

1. Responding to the draft FRBR-LRM in light of our work on fictitious (and non-human) entities;
2. Investigating different use cases through several excellent examples provide by Richard Moore of the British Library, a member of our committee; and
3. Discussion of where fictitious entities fit in the WEMI stack and the implications of using relationship designators to signal "fictitiousness" and/or "non-humanness" in bibliographic WEMI entities.

The Working Group expects to prepare a model for the inclusion of fictitious entities compatible with the final framework of the FRBR consolidated model and the Library Reference Model when they are finalized. We are also working on a method for bridging the current legacy MARC authority structure while developing a model fully compatible with BIBFRAME or whatever new system is developed. From this we plan to develop concrete RDA instructions for the inclusion of fictitious entities within RDA.

Work for the upcoming year will include:

1. Clarification on where fictitious entities should be included in the WEMI stack, for example, whether to limit them to manifestation-level entities or allow for their use in work and expressions as well;
2. The investigation of particular use cases for fictitious, non-human, and pseudonymous entities;
3. Work on identifying possible relationship designators for fictitious etc. entities and their "real" counterparts; and

4. Suggestions for appropriate RDA instructions for the inclusion of fictitious entities in RDA records in light of the requirements of the FRBR-LRM.

Respectfully submitted,

Amanda Sprochi, Chair
RSC Fictitious Entities Working Group

Music Working Group

To: Gordon Dunsire, Chair, RDA Steering Committee
From: Damian Iseminger, Chair, RSC Music Working Group
Subject: RSC Music Working Group: 2016 annual report

In RSC/Chair/6/2016, 9 tasks were assigned by the RSC to the RSC Music Working Group. The RMWG prepared and submitted RDA revision proposals and position papers for the following tasks:

2. Revise *RDA* 6.15 and 6.28.1.9.1, based on responses to 6JSC/MusicWG/14 and 6JSC/MusicWG/Discussion/2. Investigate the use of a Phoenix schedule when revising *RDA* 6.15. **Revision proposals submitted as RSC/MusicWG/3 and RSC/MusicWG/4.**
5. Review *RDA* 7.11. Determine if additional instructions for Recording Details of Place of Capture and Recording Details of Date of Capture are needed. **Revision proposal submitted as part of RSC/MusicWG/1**
6. Revise the scope and definition of Date of capture in *RDA* 7.11.3.1 and the Glossary to allow for the recording of multiple dates that are not in a range that are associated with the content of a resource. **Revision proposal submitted as part of RSC/MusicWG/1.**
8. Revise the scope of *Plate number for music* in *RDA* 2.15.3.1 to better align it with the principle of representation in *RDA* 0.4.3.4. Determine if revisions are needed in *RDA* 2.15.3.3 to support the user tasks of *find* and *identify*. **Revision proposal submitted as RSC/MusicWG/2.**
9. Prepare position paper on music conventional collective titles for EURIG by April 15, 2016. **Position paper submitted 19 April 2016**

The Working Group asks that uncompleted tasks 1, 3, 4, and 7 be assigned to the Working Group for 2017. As of this time, there are no other tasks that the Music Working Group wishes the RSC to add.

RSC Places Working Group

Report to RSC November 2016

The current Membership and Tasks are published as RSC/Chair/4/2016.

The Group liaised with the JSC Technical Working Group on related tasks.

Submissions to JSC

The Group did not submit any proposals or discussion papers to RSC

Status of tasks

1. Review the treatment of place as an entity and attributes of other entities in RDA and develop proposals for improving relevant aspects of RDA, including machine-actionability.

Status: **Ongoing**. Partially addressed by 6JSC/PlacesWG/1.

2. Liaise with the JSC Technical Working Group on issues of element analysis, linked data modelling and categorization relevant to places.

Status: **Ongoing**.

3. Investigate the issues surrounding use of the terms “government” and “jurisdiction” in 6JSC/TechnicalWG/4 in consultation with EURIG, and prepare a proposal/discussion paper by Aug. 1, 2016.

3a. Review each change in the table for recommendation #2

Status: **Ongoing**. The Working Group and EURIG were unable to find time to carry out this task.

4. Review RDA instructions for places in an international context and develop proposals for improvement, building on 6JSC/PlacesWG/1.

Status: **Ongoing**.

5. Make recommendations for the development of RDA Chapter 27 (Related places) and Appendix L (Relationship designators: Relationships between concepts, objects, events, and places), building on 6JSC/PlacesWG/1.

Status: **Ongoing**.

6. Prepare draft proposals for relationship designators for a Place entity by Aug. 1, 2016.

Status: **Ongoing**. The Working Group was unable to find time to carry out this task. The Working Group notes the recommendations in RSC/RelationshipWG/1 for a general framework to accommodate designators of any entity.

Proposals for new tasks

There are no proposals from the Group.

Gordon Dunsire
Chair, RSC Places Working Group
16 October 2016

Rare Materials Working Group

To: Gordon Dunsire, RSC Chair
From: Francis Lapka, Chair, RSC Rare Materials Working Group
Subject: RSC Rare Materials Working Group 2016 Report to the RSC

The current Membership and Tasks of the RSC Rare Materials Working Group are published as [RSC/Chair/16/2016](#).

Members of the Working Group liaised with specialists and developers of policy in their respective communities.

Submission to RSC

The Group submitted six revision proposals for the RSC meeting in November 2016:

- [RSC/RareWG/1](#) - Early Printed Resources and Rare Printed Resources
- [RSC/RareWG/2](#) - Revision of RDA 1.8.1 Numbers Expressed as Numerals or as Words
- [RSC/RareWG/3](#) - Revision of RDA 3.4.5 Extent of Text
- [RSC/RareWG/4](#) - Revision to RDA 3.12 Book Format and related terms
- [RSC/RareWG/5](#) - Revision of RDA 3.21.2.9 Note on Extent of Manifestation, Early Printed Resources
- [RSC/RareWG/6](#) - Revision of RDA 2.2.2.2 Sources of Information

Status of tasks

1. Liaise with ACRL RBMS Descriptive Cataloging of Rare Materials Task Force.

Ongoing. The activity of the Working Group assists and informs the ongoing work of the DCRM task force.

2. Follow-up 6JSC/ALA/45 (Referential relationships: RDA Chapter 24-28 and Appendix J and JSC discussion.

Not yet started. However, in the Working Group's response to TechnicalWG/1 ([RSC/TechnicalWG/1/RareWG response](#)), we note that development of Source Consulted may illuminate a way forward on the present task.

3. Review RDA accommodation of Item attributes and relationships and prepare a proposal/discussion paper by Aug.1, 2016.

- a) Review the distinction between RDA 2.21 Note on Item and RDA 3.22 Note on Item-Specific Carrier Characteristic.
- b) Review the accommodation of Item provenance data.

Not yet started

4. Collaborate with the Relationship Designators Working Group if special designators for rare materials are required.

No activity

5. Collaborate with the Technical Working Group on development of the transcription and 4-fold path elements.

No activity

6. Review the RDA exceptions for Early Printed Resources and prepare a proposal/discussion paper by Aug.1, 2016.

Revision proposals submitted as RSC/RareWG/1-6.

7. Review the treatment of statements relating to a substantially unchanged impression or state and prepare a proposal paper for the development of RDA 2.5 Edition Statement, if necessary, by Aug.1, 2016.

Ongoing. The WG declined to submit a proposal that would have made cosmetic structural changes to several pertinent instructions in RDA 2.5. The group prefers to undertake a broader review of the treatment of impressions, states, and other variants common in the description of rare materials, with the goal of submitting a discussion paper for 2017. Part of the discussion will concern subsets of resources, where the variations can be in details of carrier (e.g., variant bindings, papers) or details of content (subsets issued with hand-coloring, or other variations of state).

8. Review the accommodation of rare materials information concerning production, publication, distribution, and manufacture, in liaison with RSC activities to follow-up 6JSC/BL/26 (2.7 Production Statement: changing method of recording) in addition to 6JSC/BL/26 Sec final.

Awaiting RSC activities to follow-up 6JSC/BL/26.

For 2017, the Working Group proposes to devote its attention primarily to fulfillment of tasks 3 and 7 above, as well as ongoing work on task 6 (pending RSC review of the proposals put forward) and collaboration with other RSC groups.

RDA/ONIX Framework Working Group Report

The charge to the working groups was updated in January and I took over as Chair of the Working Group. Due to other priorities I have been unable to advance the work of the group so far this year.

Alan Danskin
14th October 2016

RSC Relationship Designators Working Group Report to RSC November 2016

The current Membership and Tasks are published as RSC/Chair/11/2016.

The Group liaised with the JSC Technical Working Group on related tasks.

Submissions to JSC

The Group submitted one proposal document for the RSC meeting in November 2016, developed in collaboration with the RSC Technical Working Group:

- RSC/RelationshipWG/1 (RDA models for relationship data)

Status of tasks

1. Investigate the requirements and review the treatment and structure of relationship designators in RDA Toolkit, and prepare a proposal/discussion paper, by Aug. 1, 2016.

1.1. Clarify the relationship of designators to elements.

1.2. Clarify the requirements of same---entity and cross---entity designators, building on 6JSC/AggregatesWG/1.

Status: **Completed** with RSC/RelationshipWG/1.

2. Prepare a proposal/discussion paper for the organization of designators between Persons, Families, and Corporate Bodies in Appendix K, taking into account 6JSC/ALA/43 and JSC responses, by Aug. 1, 2016.

Status: **Partially completed** with RSC/RelationshipWG/1.

3. Review the use of parenthetical entity qualifiers and investigate alternative approaches to designator labels, by Aug. 1, 2016.

Status: **Completed** with RSC/RelationshipWG/1.

4. Propose guidelines on submitting new relationship designators, including labels, definitions, scope, and hierarchies, by Aug. 1, 2016.

Status: **Ongoing**. This task depends on the outcomes of RSC/RelationshipWG/1.

Proposals for new tasks

There are no proposals from the Group.

Gordon Dunsire

Chair, RSC Relationship Designators Working Group

16 October 2016

RSC Technical Working Group

Report to RSC November 2016

The current Membership and Tasks are published as RSC/Chair/3/2016.

The Group liaised with the JSC Aggregates Working Group, the JSC Relationship Designators Working Group, and the RDA Development Team on related tasks.

Submissions to RSC

The Group submitted two proposal documents for the RSC meeting in November 2016:

- RSC/TechnicalWG/1 (RDA models for provenance data)
- RSC/TechnicalWG/2 (RDA 9.2: Addition of elements for Given name and Surname)

The Group collaborated on the submission of the RDA Relationships Working Group:

- RSC/RelationshipWG/1 (RDA models for relationship data)

Status of tasks

1. Review and update the RDA Element analysis documentation in 5JSC/RDA/Element analysis/Rev/3.

Status: **Ongoing**.

2. Monitor the need for value vocabulary representations of the RDA Toolkit relationship elements and designators, following recommendation #7 in 6JSC/CILIP rep/3.

Status: **Ongoing**. Members of the Group monitor relevant developments in related standards.

3. Investigate the issue of "cataloguer---friendly" and "user---friendly" labels in metadata based on the FRBR/FRAD models using the RDA Element set and Relationship designators, following recommendation #10 in 6JSC/CILIP rep/3 and the responses from BL and DNB.

Status: **Ongoing**. The Group is monitoring the development of accommodation for RDA Toolkit labels in the RDA Registry.

4. Explore the issues related to "statements" as aggregates of RDA elements and make proposals based on findings.

Status: **Ongoing**. The Group notes introduction of the attribute Manifestation statement in the Library Reference Model, and the separation of transcribed and recorded elements in the development of the 4-fold path.

5. Monitor the development of general models for provenance and other meta---metadata and prepare proposals/discussion papers on their application to RDA by Aug. 1, 2016.

Status: **Completed** with RSC/TechnicalWG/1.

6. Investigate how RDA accommodates data for inverse relationships.

Status: **Completed** as part of RSC/RelationshipWG/1.

7. Investigate how RDA accommodates relationships between instances of different entities, in collaboration with the RSC Relationship Designators Working Group, and prepare a proposals/discussion paper by Aug. 1, 2016.

Status: **Completed** as part of RSC/RelationshipWG/1.

8. Follow up recommendations in 6JSC/TechnicalWG/2

8.1. Treat note on issue, part, or iteration used as the basis for identification of the resource, note on title, and Note on series statement, as meta---elements, and apply the recommendations of 6JSC/TechnicalWG/1 as appropriate.

8.2. Ensure the semantics of the data model of Figure 3 is applied to Note on ... elements in the RDA Registry, and ensure the RDA instructions clarify the relationship between Note on ... elements and their root elements, in collaboration with the RDA Development Team.

8.3. Change the names of the elements as given in Table 4, in collaboration with the RDA Development Team.

Status: **Ongoing**. Completion of this task depends on the outcomes of RSC/TechnicalWG/1.

9. Follow up recommendations in 6JSC/TechnicalWG/5

9.1. Investigate the representation of sub-types of Nomen as element sub-types of the appellation element, following recommendation #1.

9.2. Review and develop appropriate RDA elements for compatibility with the appellation-Nomen model by assigning element sub-types and ranges, recommendation #2.

9.3. Consider adding the RDA elements family name and given name as sub-elements of name of the person, recommendation #3a, noting that recommendation #3b will be carried out by the RDA Development Team, and prepare a proposal paper by Aug. 1, 2016.

9.4. Investigate the functionality and utility of “preferred” forms of appellation element sub-types in relation to RDA and application profiles in the context of the appellation-Nomen model, recommendation #4a, in collaboration with the RDA Development Team.

9.5. Investigate the utility of relationships between Nomen and how RDA should accommodate them, recommendation #4b.

Status: **Ongoing**. Task 9.3 **Completed** with RSC/TechnicalWG/2.

10. Investigate whether a structured description can be applied only to a manifestation, and what elements are suitable for inclusion in a structured description for each WEMI entity.

10.1. Follow up on 6JSC/ALA/41 in collaboration with the RSC Aggregates Working Group

Status: **Ongoing**.

11. Review the encoding format element and recommend revisions in collaboration with the RDA Development Team.

Status: **Completed**. The vocabulary encoding scheme for Encoding format was removed from RDA Toolkit and excluded from RDA Reference in the August 2016 release.

12. Investigate issues in other designation ... elements.

Status: **Ongoing**.

13. Investigate issues of corporate body and place in RDA, and the accommodation for “online” as a value for location of conference, etc.

Status: **Ongoing**.

Gordon Dunsire
Chair, RSC Technical Working Group
16 October 2016

Translations Working Group

Report from RDA Translations Working Group – 2016

The RDA Translations Working Group met online once in the past year. In that meeting and in subsequent email discussions we have covered the following issues...

- **RSC Liaison/Working Group Chair**—we discussed the need for a chair to take the duty away from ALA Publishing. Working group members have yet to express an interest in the position. The RDA Board has posted an advertisement for the post.
- **RDA Reference**—we reviewed the status of development of the RDA Reference translation process. A number of Reference translations have been already been added to the Registry, including Dutch, French, German, Hebrew, Mandarin, and Spanish. More will follow with completion of the reference Translation template by the end of October.
- **Trados**—we reviewed the ongoing issues with our current translation tools and workflow, which are significant. The largest portion of our support budget is taken up by work related to the translation process and the situation will only get worse with the transition to the new database structure and the addition of new translations. A new translation solution is needed and should streamline the workflow, simplify the management of files and tracking of versions, and reduce errors in the process. Last month ALA Publishing and two members of the Translation Working Group met with representatives from SLD, who gave a presentation of their Trados software. Trados seems like a very viable solution to our translation problems, and we are likely to move forward with purchase and implementation in the coming months.
- **3R Project/Glossary Synch**—we are continuing discussions about the 3R project, how the group can contribute to the project and how their work will be impacted both by the changes to the Toolkit and data and by the development schedule. Discussions about the impact of the Glossary Synch, new translations tools in addition to the 3R project on the translation workflow.
- **Books of the Bible**—during the October release we rolled out a French language version of the Books of the Bible document. A disagreement about how this document should be treated in the toolkit, as a translation of the English document or as a document with unique content (e.g. the German Books of the Bible document), has opened a discussion among the group about how this content should be defined. We will report back to the RSC once the group has fully discussed the topic.

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Reports: Liaisons With External Groups

FRBR Review Group Report to RSC November 2016

The liaison was able to attend the first business meeting of the FRBR Review Group held in Columbus, USA, during IFLA 2016, and an extra-curricular meeting.

The second, full-day meeting was devoted to a presentation and discussion on the outcomes of the world-wide review of the Library Reference Model. A final draft of the model will be sent to IFLA for formal approval before the end of 2016.

The PRESSoo extension to FRBRoo for serials is going through the final stages of its formal approval. A separate FRBRoo Review Group has been set up, which includes me as a member.

Gordon Dunsire
Chair, RSC
16 October 2016

ISBD Review Group

Working Group of the IFLA Cataloguing Section

The group has been working on an upgrade of the ISBD for the past few years. It urgently recommends that this task be completed in order to present an updated version of the standard.

The importance of the ISBD was emphasized once more during the working sessions within the IFLA WLIC in August in Columbus, Ohio. Many users are not able to or do not wish to implement complex standards, but require a simple, practical and yet dependable standard, such as the ISBD.

In principle, the group finds that a good opportunity exists for implementing IFLA-standards as basic standards, which are of great interest, and not to be seen in competition with complex standards such as RDA.

Moreover, simple-to-use standards, such as those from IFLA, could help introduce implementation of standards to cultural institutions such as archives and museums.

To continue with the ISBD-update, the ISBD Review Group suggests setting up a sub-working group, which is to compare the ISBD with the new model IFLA-LRM, taking into special consideration aspects of internationality, multilingualism and recording in numerous scripts.

The deadline for this study is the date of the next IFLA-conference in Wroclaw, 2017.

Both the cataloguing Section and the Committee on Standards have accepted this proposal.

Below:

Cataloguing Section
ISBD Review Group
ANNUAL REPORT
2015-2016

Renate Behrens, European Regional Representative

October 2016

ISSN International Centre

Report to RSC November 2016

The liaison had informal discussions with staff of the ISSN International Centre and members of the ISSN Network during IFLA 2016.

Further information about ISSN developments relevant to RDA can be found in the report submitted to the RSC by the ISSN International Centre for the November 2016 RSC meeting.

A representative of the ISSN International Centre will attend the RSC meeting in Frankfurt for relevant discussion on serials metadata.

Gordon Dunsire
Chair, RSC
16 October 2016

ONIX Liaison Report

There is nothing specific to report from an RDA perspective, but Editeur published a minor release ONIX 3.03 in April 2016 and some of the changes are of interest.

The update includes some enhancements to the <Contributor> element. These include: addition of <Gender> to support ISNI registration and to collection of statistical information on gender balance (interestingly, the values permitted are based on ISO 5218 but are associated with the persona of the contributor rather than real world individual behind the persona); addition of the <Prize> composite to enable awards for a body of work to be associated with the contributor.

<Event> composite has also been added to broaden the scope of the existing <Conference> composite.

<RelatedProduct> has been added to the <ContentItem> composite to complement the existing <RelatedWork>.

Alan Danskin
14th October 2016

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RDA Technical Terminology

Briefing paper, RSC Chair and RSC ACOC Representative, 29 October 2016

RDA uses controlled terminologies to describe technical aspects of the RDA Toolkit guidelines and instructions, and the RDA Registry. The Toolkit and Registry may use different terms even though they describe the same concept. This is a result of separate historical development and the needs of the different audiences that use RDA data.

This document provides a thesaurus of the RDA technical terms with definitions and scope notes, and relationships between terms used for similar concepts.

RDA Toolkit terms

This terminology is used in the guidance and instructions in RDA Toolkit. RDA Toolkit is aimed at cataloguers who create and maintain the data.

RDA Registry terms

This terminology is used in the linked data representation of RDA elements and vocabularies in the RDA Registry. It is based on the terminology of Resource Description Framework (RDF). The RDA Registry is aimed at developers of linked data and Semantic Web applications of the data.

Context

RDA provides guidance and instructions for describing aspects of things of interest and the relationships between them that are relevant to the users of cultural heritage information.

Difference

The main difference between the Toolkit and Registry is with the terms used for the structural components (or building blocks) of RDA descriptions and relationships.

The following table lists the different terms used for the same conceptual component.

Component	Toolkit term	Registry term	Example
Type of thing	entity	class <i>or</i> instance	manifestation
Aspect or relationship of thing	element	property	carrier type
Aspect of thing	attribute	property	note on manifestation
Specific aspect	element sub-type	sub-property	note on frequency
Part of aggregated statement	sub-element	property	place of publication
Relationship between things	relationship element	property	related manifestation
Specific relationship	relationship designator	sub-property	sequel

(Note: a Registry sub-property is a property, in the same way that a Toolkit element sub-type and a Toolkit sub-element are Toolkit elements; a sub-type of something is also a type of something.)

The Registry terminology is more restrictive. RDF uses the term “property” both for the relationship between two things (a Toolkit “relationship element”) and the relationship between a thing and a string (literal) value (a Toolkit “attribute element”).

Documentation, papers, etc. about the Registry will sometimes use qualified terms such as “attribute property” if the distinction is required. The infrastructure for the 4-fold path will introduce the terms “object property” and “datatype property” to make an absolute distinction in application profiles: An object property is a relationship element or relationship designator; a datatype property is an attribute property.

The Toolkit term “entity” is used interchangeably to mean a specific instance or individual and the class of things to which it belongs. This reflects a general linguistic structure: any cat is a member of the class of cats; “a” cat is a representative of all cats (the class); “the” cat is a specific individual cat with some aspects that do not apply to all cats. It can, however, lead to occasional ambiguity in the English instructions, possibly exacerbated in translations, and should be qualified if necessary.

Example

Toolkit RDA 0.2.3: “The RDA data elements for describing entities associated with a resource generally reflect the attributes and relationships associated with the entities person, family, corporate body, and place, as defined in FRAD.”

In Registry terms: The RDA properties for describing classes associated with a Work, Expression, Manifestation, or Item generally reflect the attribute and relationship properties associated with the classes Person, Family, Corporate Body, and Place, as defined in FRAD.”

Thesaurus

R/T: used in Registry or Toolkit

Sources: the source vocabulary for the definition.

{ }: a term in the thesaurus

Term	Definition	Scope note	See Also	R/T	Sources
alignment	A set of associations between the {elements} of two different {element sets} or between the concepts of two different {value vocabularies}.		map	R	
application profile	A document (or set of documents) that specifies and describes the metadata used in a particular application.			R	DCAP
attribute	A characteristic of an {entity}. An attribute can be inherent in an entity or externally imputed.		property	T	MulDiCat <i>Add to RDA Terms</i>
class	A group containing members that have {attributes}, behaviours, {relationships} or semantics in common; a kind of category.		entity instance sub-class	RT	DCAM Vernacular use in Toolkit <i>Add to RDA Terms</i>
conceptual model	A representation of a system, made of the composition of concepts which are used to help people know, understand, or simulate a subject the model represents.				WikiP
dataset	A collection of factual information presented in a structured form.			R	RDA Terms.
domain	The {class} of all {instances} of the {subject} of a {triple} that uses the specified {property} as a {predicate}.			R	

Term	Definition	Scope note	See Also	R/T	Sources
element	A word, character, or group of words and/or characters representing a distinct unit of bibliographic information.		element set element sub-type property sub-element	T	RDA Terms. DCAM: A synonym for property
element set	A set of {classes} and {attributes} or {properties} used to describe {entities} of interest.		element	RT	Based on W3C LLDXG <i>Add to RDA Terms</i>
element sub-type	A narrower category or type of an {element}.		element sub-property	T	<i>Add to RDA Terms</i>
entity	Something that has a unitary and self-contained character; something that has independent or separate existence; an abstraction, ideal concept, object of thought, or transcendental object.		class	T	MulDiCat Appears in RDA Terms as alt label “related entity” <i>Add to RDA Terms</i>
instance	An individual member of a {class}.		class	R	Based on RDFS
label	A string whose function is to distinguish one {entity} from another.	Includes identifiers, names, titles.		R	Definition from ESA. Used in RDA Terms in “accessible labels”.
map	A set of {mappings} that relate one schema to another.		alignment mapping	R	Definition used by DevTeam. RDA value vocabulary.
mapping	A semantic {relationship} between metadata {elements}.		map	R	Definition used by DevTeam.
object	The final part of a {triple}.			R	Based on W3C LDG Entry in RDA value vocabulary

Term	Definition	Scope note	See Also	R/T	Sources
ontology	A formal naming and definition of the types, {properties}, and interrelationships of the {entities} that really or fundamentally exist for a particular domain of discourse.			R	WikiP
predicate	The middle part, the linkage or verb, of a {triple}.		property	R	Based on W3C LDG
primary relationship	A {relationship} between a work, expression, manifestation, or item that is inherent in the FRBR definitions of those entities.		relationship	T	RDA Terms
property	A specific aspect, characteristic, {attribute}, or {relationship} used to describe resources.		attribute element predicate relationship sub-property	R	Based on DCAM
range	The {class} of all {instances} of the {object} of a {triple} using the specified {property} as a {predicate}.			R	
relationship	A specific connection between {entities} or their {instances}.		primary relationship property	T	MulDiCat Used in RDA Terms as “relationship designator”, “primary relationship” Add to RDA Terms
relationship designator	A designator that indicates the nature of the {relationship} between {entities} represented by authorized access points, descriptions, and/or identifiers.			T	RDA Terms.

Term	Definition	Scope note	See Also	R/T	Sources
relationship element	An {element} that relates two {entities}.			T	<i>Add to RDA Terms</i>
resource	A work, expression, manifestation or item.			T	RDA Terms.
resource	Any thing described by RDF.			R	RDFS
schema				T	Only appears in definition of encoding format
sub-class	A narrower category or type of a {class}.		class	R	
sub-element	An {element} that is a component of a larger {element} that aggregates data values from two or more {elements}.		element	T	<i>Add to RDA Terms</i>
sub-property	A narrower category of a specific {property}.		element sub-type property	R	
subject	A term, phrase, classification number, etc., that indicates what the work is about.			T	RDA Terms.
subject	The first part of a {triple} referring to who or what the RDF statement is about.			R	Based on W3C LDG
syntax encoding scheme	A set of strings and an associated set of rules that describe a {mapping} between that set of strings and a set of resources.			R	Based on DCAM
triple	An RDF statement, consisting of two things, a {subject} and an {object}, and a relationship between them, a verb, or {predicate}.	The {object} can be a string (a member of the {class} of literals).		R	Based on W3C LDG

Term	Definition	Scope note	See Also	R/T	Sources
value vocabulary	Labels and definitions of terms that are used as values for {elements} in metadata.		vocabulary encoding scheme	R	Based on W3C LLDXG
vocabulary encoding scheme	A named structured list of representations of controlled values for {elements}.		value vocabulary	RT	RDA Terms.

Sources of definitions

DCAM	Dublin Core Abstract Model	http://dublincore.org/documents/2007/04/02/abstract-model/
DCAP	Guidelines for Dublin Core Application Profiles	http://dublincore.org/documents/profile-guidelines/
ESA	RDA Element Set Analysis	http://www.rda-jsc.org/archivesite/docs/5rda-elementanalysisrev3.pdf
MulDiCat	Multilingual Dictionary of Cataloguing	http://metadataregistry.org/vocabulary/show/id/299.html
RDA Terms	RDA glossary terms	http://metadataregistry.org/vocabulary/show/id/420.html
RDFS	RDF Syntax	https://www.w3.org/TR/rdf-schema/
W3C LDG	W3C Linked Data Glossary	https://www.w3.org/TR/ld-glossary/
W3C LLDXG	W3C Library Linked Data Expert Group report	https://www.w3.org/2005/Incubator/1ld/XGR-1ld-vocabdataset-20111025/
WikiP	Wikipedia	http://en.wikipedia.org/wiki/Main_Page

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ISBD Review Group Annual Report 2015-2016

**Cataloguing Section
 ISBD Review Group
 ANNUAL REPORT**

2015-2016

I. Cataloguing Section's Strategic Plan for ISBD review

Following discussions about the strategic plan for the **International Standard Bibliographic Description** (ISBD) review and revision at the Singapore 2013, Lyon 2014 and Cape Town meetings of the Cataloguing Section's Standing Committee, ISBD Review Group and ISBD Linked Data Study Group, the ISBD Review Group was asked to produce a second discussion paper for the midterm meeting of the Cataloguing Section's Standing Committee which took place in Paris, Bibliothèque nationale de France, on 29 April 2016, done in order to secure that all type of problems are discovered.

The discussion paper highlighted some of the problems and questions the analysis presents, that are in part common with the issues found for area 1:

- There is a difference in the definition of edition between ISBD and RDA¹ (Resource Description and Access).
- Should ISBD's first categorization criteria be element/property as identified in the namespace (RDF² - Resource Description Framework - representation)?
- Should each element be defined as to its Mandatory/Repeatable status?
- Should each element be introduced by an explicit definition, to be followed by clearly defined rules?
- Should the revised version of ISBD accommodate both the domains "Resource" of ISBD and "WEMI" of the FRBR model³ (Work, Expression, Manifestation, Item) terminologies, so as to fit both an FRBRised and a non-FRBRised description?
- Mapping to FRBRer is almost accomplished, will there be need of mapping with FRBR-Library Reference Model?
- Should notes be ordered accordingly to WEMI elements?
- How to describe relationships between data?
- Should the ISBD be based on "self description" or description by cataloguers, where for example data could be corrected if misprinted?
- Should an ISBD description be prepared for direct use of human beings or machines to read and mediate? Perhaps including guidelines on how to aggregate data for a full record in order to display?

All these questions and angles leads back to the basic discussion about what the ISBD should be in the future and how the standard works with IFLA's other standards. Miriam Säfström apologized for not having being able to pursue the task on clarification of the standards correlations, observing that the issue is not entirely up to the Cataloguing Section standing Committee alone, but also to the Committee on Standards.

A way forward to respond to both scenarios being discussed (to continue the content of ISBD on the current level but change to reflect FRBR, or to plan for a shorter and more principal ISBD) might be having descriptive principles followed by a set of suggested rules to that principle.

II. ISBD Review Group activities report

a. Project and financial reports

An application for funding the project *Development of the International Standard Bibliographic Description* was made, with the following terms:

- 1000 Euros: A two-day face-to-face meeting of the ISBD Linked Data Study Group “to complete the work on maps and alignments and guidelines for the use of ISBD as linked open data, and prepare the publication of all the work in the IFLA website”.
- 2000 euros for the meeting of the ISBD RG, “in order to harmonise the standard with the FRBR Library Reference Model, that will be published in 2016, and following the general rule for standards revision in four-year time, as the Consolidated edition of the ISBD was published in 2011.”
- 400 euros to attend the RSC meeting. “As of the protocol between RDA/JSC (now RDA Steering Committee) and the ISBD RG, take part to the November RSC meeting in order to continue to maintain the reciprocal alignment.”

The Professional Committee observed that given the nature of the work planned for this year, the Review group was encouraged to use electronic communication rather than to have physical meetings. For the second proposed meeting, as FRBR is expected only in August 2016, they felt that some progress could be made in the 2016 and 2017 WLIC meetings and online during the year but an additional physical meeting was not necessary. For the third meeting, they did not have an understanding of the relationship with RDA/JSC (now RSC) and what benefit there was to IFLA in being present at the meeting.

The Professional Committee has instead agreed to provide funding for the first meeting as requested, 1000 Euros. This amount was be used to fund travel and accommodation for two members of the ISBD Linked Data Study Group for a meeting held in Paris, the Bibliothèque nationale de France, 30-31 May 2016. The meeting was thus attended in person by six members, with three connected remotely via Skype.

The meeting completed the work on the *Guidelines for use of ISBD as linked data* and the *ISBD to FRBR*

namespaces alignment. The Study Group has prepared both documents for comments and approval at the ISBD RG meeting in Columbus, August 2016.

b. Guidelines for translations of the IFLA ISBD namespace in RDF

As discussed at the Committee on Standards meeting in Cape Town, the *Guidelines for translations of the IFLA ISBD namespace in RDF* published by the ISBD Linked Data Study Group in May 2015⁴ as the result of the project funded in 2013, *ISBD Namespaces Alignments and Publication as Linked Data* (G3.13.2-1/13), and based on the Guidelines for translations of IFLA namespaces in RDF (2013)⁵, compiled by the ISBD Linked Data Study Group and published in version 1.0 in the IFLA website after the approval of the ISBD Review Group, the former Namespaces Technical Group and the Standing Committee of the Cataloguing section, have been submitted for the final approval to the Committee on Standard on 26 August 2015.

c. ISBD Linked Data Study Group

As already mentioned, the work of the ISBD Linked Data Study Group was mainly focused on completing the *Guidelines for use of ISBD as linked data* and the *ISBD to FRBR namespaces alignment*. A full report on the work of the group has been presented by the chair, Violeta Bertolini.

d. ISBD and RDA

As part of the activities defined by the protocol set up between the JSC/RDA and ISBD RG to “support the maintenance and development of functional interoperability between data created using the RDA and ISBD instructions and element sets”,⁶ the chair of the ISBD Review Group could take part to the JSC meeting in Edinburgh, 3-5 November 2015, and gave a short report on the status of the ISBD. During the meeting, some issues were raised that may be relevant for the future development of the ISBD: a discussion was focused on the need to clarify the exact meaning of terms such as *transcribe* and *record*, and to use them consistently, and how to distinguish unambiguously the difference between an element transcribed from an internal but not prescribed source, and an element supplied by the cataloguer.

III. ISBD namespaces, mappings, and alignments

a. ISBD namespaces

The *unconstrained ISBD namespace*, that is, a separate full set of ISBD elements as properties in RDF without defined domain and range, that the ISBD Linked Data Study Group decided to create at the Cape Town meeting, was published in the Open Metadata Registry on 7 August 2015.⁷ The ISBD Review Group wishes to thank Gordon Dunsire for taking this action so promptly. One of the advantages of the unconstrained properties is to allow a correct mapping between RDA and ISBD element sets.

b. ISBD mappings and alignments in GitHub

Mirna Willer has reported on 19 August 2016 to LIDATEC the requirements for ensuring IFLA registry of bibliographic standards alignments and mappings on the platform GitHub⁸ (Action 1/15), and repeated in Spring 2016, but got no reaction, nor has IFLA developed such infrastructure yet. ISBD namespaces alignments and maps are thus still published only in the RDA registry website on GitHub.⁹

c. ISBD and RDA/ONIX Framework

The *Alignment from ISBD content form compounds to RDA/ONIX Framework*,¹⁰ relating compound statements based on the ISBD Content Form value vocabulary to the RDA/ONIX Framework element set and value vocabularies, has been published in the RDA registry in December 2015.

IV. Publications and presentations

Polish, Serbian and Slovenian are in preparation, which will bring the number of languages in which the ISBD is available to 13.

V. Membership

Renate Behrens (Arbeitsstelle für Standardisierung, Deutsche Nationalbibliothek, Frankfurt am Main) is the new liaison from the RDA Steering Committee, after the step down of Christine Frodl; the ISBD Review Group wishes to thank Christine Frodl for her collaboration and to welcome the new liaison.

VI. Communication and website

Communication within the ISBD Review Group is done mostly by email; working documents and discussions are shared also through a Wiki hosted on the platform PBworks, and the web pages on the IFLA website (<http://www.ifla.org/en/isbd-rg>) are constantly updated. The ISBD Review Group thanks Agnese Galeffi for maintaining the ISBD pages on the site.

Respectfully submitted by
Massimo Gentili-Tedeschi
ISBD Review Group, Chair
August 2016

1 <http://www.rdatoolkit.org>, <http://www.rda-rsc.org/>

2 <http://www.w3.org/RDF/>

3 <http://www.ifla.org/publications/functional-requirements-for-bibliographic-records>

4 http://www.ifla.org/files/assets/cataloguing/isbd/OtherDocumentation/guidelines-ifla_isbd-namespacetranslation-_v.1.0_april2015.pdf

5 <http://www.ifla.org/node/5353>

6 6JSC/Chair/13 [Protocol between the JSC and the ISBD Review Group], <http://www.rda-jsc.org/docs/6JSCChair-13.pdf>; - 6JSC/Chair/13/Shared documents [Documents shared between the JSC and the ISBD Review Group], <http://www.rda-jsc.org/docs/6JSC-Chair-13-Shared-documents.pdf>

7 <http://metadataregistry.org/schema/show/id/97.html>

8 <https://github.com/>

9 <http://www.rdaregistry.info/>

10 <http://www.rdaregistry.info/Aligns/alignISBDCFX2ROF.html>

Activity report from ISSN International Centre

November 2015-November 2016

I. Status of the ISSN Network

The ISSN Network consists of the International Centre, based in Paris, and 89 member countries worldwide: Algeria, Argentina, Armenia, Australia, Bahrain, Belgium, Benin, Bolivia, Bosnia and Herzegovina, Brazil, Bulgaria, Burkina Faso, Canada, Chile, China, Colombia, Costa-Rica, Croatia, Cyprus, Czech Republic, Denmark, Dominican Republic, Ecuador, Egypt, Estonia, Finland, France, Gambia, Ghana, Georgia, Germany, Greece, Hungary, Iceland, India, Indonesia, Iran, Ireland, Italy, Jamaica, Japan, Kyrgyzstan, Latvia, Lesotho, Lithuania, Luxembourg, Former Yugoslav Republic of Macedonia, Malaysia, Mali, Mauritius, Mexico, Moldova, Montenegro, Morocco, Namibia, Niger, Nigeria, Nepal, New-Zealand, Netherlands, Norway, Philippines, Poland, Portugal, Republic of Korea, Romania, Russian Federation, Saudi Arabia, Senegal, Serbia, Seychelles, Singapore, Slovakia, Slovenia, Spain, Sri Lanka, Sudan, Sweden, Switzerland, Tanzania, Thailand, Tunisia, Turkey, United Kingdom, United States of America, Uruguay, Uzbekistan, Venezuela, Viet Nam.

The Russian Federation joined the ISSN Network in December 2015.

II. Cataloguing activity of the ISSN Network

ISSN are assigned to serial publications by the International Centre and the ISSN National Centres which are hosted by national libraries or scientific and technical research centres. ISSN are registered as identification metadata in bibliographic records which are subsequently published in the ISSN Register.

At the end of 2015, the ISSN Register included 1,884,990 records with an increase of 73,880 new records added in 2015. The identification of electronic resources continues to make good progress both in quantity and quality: 177,631 online serial titles had an ISSN at the end of 2015 (+ 22,886 records in 2015, i.e. 30% of the total increase).

The assignment activity of the ISSN International Centre itself reached a total number of 3,859 new ISSN assigned. These figures do not include the amendment of existing records.

The ISSN Register ingests RDA records. Currently, **12 National Centres** send records with 336-338 fields and/or 264 fields – the presence of these fields may be considered as a “marker” of RDA records.

The ISSN International Centre has not switched to RDA for its own assigning and cataloguing activities. However, the Registry has been technically amended notably to accept these new MARC fields.

III. Standardisation activity

a. RDA Working Group on Aggregates

Clément Oury (Head of Data, Network and Standards, ISSN International Centre) has been invited to join the RSC Aggregates Working Group (AWG). Continuing resources are indeed a specific case of aggregates.

The ISSN International Centre has thus been involved in the different activities of the AWG (production of a discussion paper; review of proposals produced by other groups; review of FRBR-LRM, etc.). See the AWG 2016 activity report for details. The ISSN International Centre will also be involved when the AWG discusses the consistency between RDA and PRESS₀₀, the extension of FRBR₀₀ for continuing resources.

b. ISSN Review Group

The ISSN Review Group (ISSN RG) is a group of experts, from different ISSN National Centres, in charge of the general maintenance and evolution of ISSN bibliographic rules.

Among many different topics, the ISSN RG has been working on:

- the preparation of the ISSN standard revision (see below);
- a response to the FRBR-LRM world-wide review;
- the harmonization between ISSN, RDA and German cataloguing rules, at the request of the Deutsche Nationalbibliothek;
- ISSN assignment to digitized resources.

It has also decided to regularly issue ISSN Supplementary Guidelines, i.e. additional rules that complement or specify the ISSN Manual where it is not clear enough. Two guidelines have been issued so far:

- how to define and record the publisher of a blog;
- main criteria to be checked when assigning ISSNs to publisher packages.

a. ISSN Manual and RDA

The latest version of the ISSN Manual was released in January 2015 after extensive review by the members of the ISSN Review Group. It is available online in French, English and Spanish at <http://www.issn.org/understanding-the-issn/assignment-rules/issn-manual/>.

The Russian Book Chamber has translated the ISSN Manual into Russian. The ISSN International Centre is currently reviewing the Russian version to publish it on its own website.

The ISSN RG frequently deals with issues related to the harmonization between ISSN instructions (aligned with ISBD) and RDA instructions.

During its meeting on 25th-26th April, 2016, the ISSN RG clarified its position towards the evolutions introduced in RDA and stated that:

- The ISSN Manual draws a clear distinction between ISBD and RDA in its introduction of section 0: “In developing these rules, care has been taken to ensure so far as possible compatibility and harmonization with international standards such as the International Standard Bibliographic Description (ISBD, Consolidated edition) and the practices of other International systems such as the Anglo-American Cataloguing Rules (AACR, 2nd edition) and RDA: Resource Description and Access” (see the Manual: <http://www.issn.org/understanding-the-issn/assignment-rules/issn-manual/>).
- As ISBD is the only content standard supported by IFLA, it remains the reference of the ISSN network. “Harmonization” should be reached between ISSN and ISBD.
- On the other hand, RDA is adopted by numerous institutions hosting ISSN Centres. Therefore, “compatibility” should be reached with RDA; when a risk of incompatibility is identified, exceptions should be added in order to avoid double-cataloguing by ISSN National Centres.

b. ISO & revision of ISSN standard

Gaëlle Béquet (Director of the ISSN International Centre) is the Chair of ISO Technical Committee (TC) 46 “Information and Documentation”.

A ballot on the Systematic review of the ISSN standard (ISO 3297:2007) was distributed to ISO members in April 2016. The vote was closed in September 2016 and the systematic review was approved. The revision process should be launched shortly and should last at least 2 years. A few countries have already appointed experts to participate in the working group.

For the record, institutions in ISO P-member countries (“P” stands for “Participating”) are entitled to nominate experts to the working group which will be set up under the umbrella of the Technical Committee 46 (Information and Documentation) / Sub-Committee 9 (Identification and Description).

Please find the list of ISO TC 46/SC 9 P-members here:

http://www.iso.org/iso/fr/home/standards_development/list_of_iso_technical_committees/iso_technical_committee_participation.htm?commid=48836.

c. IFLA

Representatives of the ISSN International Centre are members of several IFLA Standing Committees and Review Groups:

- Gaëlle Béquet is a member of the SC of the Serials and Other Continuing Resources section;
- Clément Oury is a member of the SC of the Cataloguing section. He is also ISSN liaison with ISBD RG, FRBR RG, and Permanent Unimarc Committee.

In 2013-2014, the ISSN International Centre and the Bibliothèque nationale de France developed the PRESS₀₀ model, an ontology intended to capture and represent the underlying semantics of bibliographic information about continuing resources. The model was validated by the FRBR Review Group and submitted to a world-wide review in March-April 2015 whose results were positive.

It has thus been decided by the Cataloguing Section to set up a “PRESS₀₀ Review Group” to ensure the maintenance of the PRESS₀₀ standard. Clément Oury has been elected as chair of the Review Group, whose other members are Vincent Boulet (BnF), Gordon Dunsire (chair of RDA Steering Committee), Louise Howlett (BL/ISSN UK), Patrick Lebœuf (BnF) and Regina Reynolds (LC/ISSN US).

Current version of PRESS₀₀ (1.2 version) was published on IFLA website on April 2016: (http://www.ifla.org/files/assets/cataloguing/PRESSoo/pressoo_v1.2.pdf).

This version has been sent to IFLA Committee on Standards (CoS) for an official IFLA endorsement. The CoS has requested the PRESS₀₀ RG to make some amendments. A new version was issued on September 2016.

For more details, please look at the PRESS₀₀ Review Group report to IFLA CATS section: http://www.ifla.org/files/assets/cataloguing/PRESSoo/pressoorg-report_2016.pdf

d. EURIG

The ISSN International Centre is a member of EURIG (European RDA Interest Group). Two representatives of the ISSN International Centre attended the EURIG meeting in Riga (May 2016).

IV. Networking and communication activities

The 40th ISSN Directors’ meeting took place from 13th to 16th October 2015 at the kind invitation of National Library of Serbia in Belgrade. The 41st meeting will be organized in Brasilia at the kind invitation of the Instituto Brasileiro de Informação em Ciência e Tecnologia (IBICT) from 7th to 11th November 2016.

The 21st meeting of the General Assembly of the ISSN was held in Paris, on 28th and 29th April 2016. On April 28th, a one-day international conference was organized by the ISSN International Centre about the topic: “Bibliographic metadata going linked: business cases and projects”. This conference was patronized by UNESCO’s director, Mrs Irina Bokova.

The ISSN International Centre and members of the ISSN Network contribute papers and/or presentations about the evolution of cataloguing standards. We may notably mention:

- a presentation by Regina Reynolds (LC/ISSN US), at the National Library of France, about the future of serials cataloguing, on April 27th, 2016 (in French: http://www.transition-bibliographique.fr/wp-content/uploads/2016/06/20160427_rdathon_reynolds.pdf);

- the workshop “RDA and Serials” was moderated by Clément Oury during the satellite conference “RDA in the wider world” organized at OCLC offices on August 11th, 2016 (see <http://www.oclc.org/content/dam/oclc/events/2016/IFLA2016/presentations/RDA-in-the-Wilder-World-Workshop-on-Serials.pdf>).