

To: RDA Steering Committee

From: Gordon Dunsire, RSC Chair

Subjects: Outcomes of the 2015 JSC Meeting

The Joint Steering Committee for Development of RDA (JSC) met at the National Library of Scotland, in Edinburgh, Scotland, from November 2-6, 2015.

James Hennelly, Managing Editor of RDA Toolkit, Simon Edwards, Chair of the Committee of Principals of RDA, and Verena Schaffner, Vice-chair of the European RDA Interest Group (EURIG) attended the meeting.

Susanne Oehlschläger from Deutsche Nationalbibliothek (DNB) attended the meeting for Christine Frodl, the DNB representative to the JSC. Pat Riva from Bibliothèque et Archives nationales du Québec attended the meeting for William Leonard, the CCC representative to the JSC. Alan Danskin, formerly the British Library representative, attended the meeting as the United Kingdom representative representing both the British Library and the Chartered Institute of Library and Information Professionals, as part of the transition to a representative for Europe in the new governance model.



The JSC and colleagues, from left to right: Simon Edwards, Gordon Dunsire, Ebe Kartus, Judy Kuhagen, Kathy Glennan, Alan Danskin, Pat Riva, Verena Schaffner, Dave Reser, Susanne Oehlschläger, Kate James

53 observers from 18 countries (Belgium, Croatia, Czech Republic, England, Finland, France, Germany, Iceland, Italy, Latvia, Netherlands, Scotland, Slovenia, Spain, Sweden, Switzerland, United States, and Wales) attended public sessions of the meeting.

This report is a summary of the main outcomes of the JSC meeting. Further information about JSC's activity and the development of *RDA* will be found in the annual report for 2015.

Auxiliary events in Edinburgh brought the overall attendance to 100+ and included:

- a meeting of area music librarians with Damian Iseminger, chair of the JSC Music Working Group, and Massimo Gentili-Tedeschi, chair of the ISBD Review Group, hosted by Edinburgh University Library.
- visits by observers to rare materials departments at Edinburgh University Library and the National Library of Scotland.
- a meeting of the ACRL/RBMS Descriptive Cataloging of Rare Materials Task Force (ALA DCRM Task Force) hosted by the National Library of Scotland.
- a seminar on rare materials and RDA on November 6 organized by the Cataloguing and Index Group Scotland and an international committee of rare book cataloguing experts.
- an RLS-athon on November 9 organized by the Cataloguing and Index Group Scotland and the JSC.

Governance review and RDA strategy

The JSC had extensive discussions with the Chair of the Committee of Principals about the next steps in the transition to the new governance model by 2019.

Throughout the meeting there was ongoing consideration about the reorganization and internationalization of RDA Toolkit prompted by various proposals and by discussion papers from some of the working groups. The results of discussions will form the basis of a work plan for the next three years for coordinated development of the Toolkit, RDA Registry, and RDA instructions to accommodate new features from the evolving conceptual and data models underpinning RDA. The work plan will support the RDA strategy for international, cultural heritage, and linked data communities.

Discussion of proposals, models, and standards

The JSC discussed 39 proposals and discussion papers plus the responses to those documents. The documents represented a wide diversity of topics and included proposals or discussion papers from six of the nine JSC working groups: JSC Aggregates Working Group, JSC Capitalization Instructions Working Group, JSC

Fictitious Entities Working Group, JSC Music Working Group, JSC Places Working Group, and JSC Technical Working Group.

The tenor of the discussion was very different at this year's meeting with an emphasis on strategic directions for RDA, including:

- the forthcoming Functional Requirements of Bibliographic Records—Library Reference Model (FRBR-LRM) and its impact on RDA
- internationalization
- requirements of cultural heritage communities
- requirements of linked data communities.

The topics for discussion on November 5 reflected the JSC's commitment to internationalization and expansion of scope of RDA:

- description of rare materials with Francis Lapka, Chair of the ALA DCRM Task Force, Audrey Pearson, and their colleagues
- status of FRBR-LRM and FRBRoo/CRM with Pat Riva, Chair of the FRBR Consolidation Editorial Group
- status of ISBD with Massimo Gentili-Tedeschi, Chair of the ISBD Review Group
- update on activities of the ISSN International Centre and the status of PRESSoo with Clément Oury, Head of Data, Network and Standards Department of the Centre.

The JSC agreed to clarify the need for both transcribed and recorded versions of manifestation elements to respond to different user tasks of identify, select, and obtain. These parallel versions will require a significant change in the instructions. The RDA instructions will be expanded to fully accommodate the needs of actionable data and more clearly distinguish between unstructured and structured descriptions and access points.

The JSC renewed the working principle, first stated at the 2014 JSC meeting, during the transition period to a new governance structure and a reorganized RDA Toolkit: "Extensive changes to RDA in areas that are likely to require significant review and amendment (with high risk impact factors) will usually not be implemented. This includes the layout and numbering of the main sections and appendices. Proposals may be accepted in principle, but suspended pending subsequent review, or referred to other JSC and related groups involved in changes to these areas."

The JSC put a moratorium on adding new relationship designators other than those already proposed during 2015 until the JSC Relationship Designators Working Group had finished its tasks of preparing a general paper on designators and a set of guidelines for proposing new designators.

Changes to *RDA* approved by the JSC during the meeting will appear in the April 2016 update of RDA Toolkit. The text of approved proposals will be issued as documents labeled as “Sec final” versions and posted on the committee’s public website during January and February 2016. A table listing the JSC decisions/actions for all proposals and discussion papers will be posted on the website early in 2016. Some of the decisions taken are summarized below under general topics.

Models

Several discussion papers and proposals focused on development of the models that form the foundations of RDA. The overall outcome of the discussions was to refer follow-up actions to working groups. Action deadlines will be determined by acceptance of the final version of the FRBR-LRM and the RDA work plan.

The JSC confirmed that RDA should conform to the FRBR-LRM treatment of bibliographic agents, and that fictitious entities would be accommodated using a new RDA Nomen entity. New and amended entities in the FRBR-LRM, including Place and Timespan, will be developed along with elements for aggregations and relationships as part of the work plan. The JSC agreed to take forward the development of the treatment of carrier and content extent. The JSC did not agree with the overall proposals of 6JSC/ALA/45 on referential relationships, but noted actions to be taken to resolve the issues raised.

The RDA Development Team will create expanded and refined element sets in the RDA Registry to support the development of new RDA entities and distinct data acquisition and relationship models. Synchronization of the Registry and Toolkit will be included in the work plan.

Internationalization and expansion of RDA’s scope

The Capitalization Working Group will prepare a template for Appendix A for language-specific instructions and identify gaps. The proposals in 6JSC/LC/32/rev for instructions on devised titles were accepted with revision. 6JSC/MusicWG/15 and 6JSC/MusicWG/16/rev, originating with the Finnish Music Group, were accepted with revision. The issues raised in 6JSC/BL/26 will be covered by development of the instructions on transcription and recording.

Music

Many of the proposals submitted by the Music Working Group were accepted, some with revisions. The group will follow up on a number of issues. 6JSC/MusicWG/14 was withdrawn by the group Chair for further consideration.

Clarification and consistency

Practical proposals for improving the clarity and consistency of the RDA instructions were included in several papers submitted to the JSC.

6JSC/CCC/17/rev, 6JSC/ALA/39, and 6JSC/ALA/37 were accepted as proposed. 6JSC/ALA/42, 6JSC/ALA/38, 6JSC/BL/25, 6JSC/LC/33/rev, 6JSC/CCC/18/rev, and 6JSC/LC/34/rev were accepted with revisions. Actions resulting from 6JSC/CCC/19, 6JSC/ALA/40, 6JSC/ALA/44, and 6JSC/BL/Discussion/1 will result in new proposals in 2016.

JSC working groups

The JSC received annual reports from its nine working groups:

- JSC Aggregates Working Group
- JSC Capitalization Instructions Working Group
- JSC Fictitious Entities Working Group
- JSC Music Working Group
- JSC Places Working Group
- JSC RDA/ONIX Framework Working Group
- JSC Relationship Designators Working Group
- JSC Technical Working Group
- JSC Translations Working Group.

During the meeting, the JSC renewed current tasks and assigned new tasks to these working groups. In the new governance model, the working groups will assume a larger role in the development of RDA. The work plan will incorporate the activities of the working groups.

The RDA Steering Committee (RSC) will establish two new working groups for archives and rare materials. The Co-Publishers will establish a working group on reorganization of RDA Toolkit with members representing both developers and users of the Toolkit.

Collaboration with other groups

Gordon Dunsire (Chair, JSC) is the liaison to the Committee of Principals of RDA. Gordon Dunsire and Judy Kuhagen (Secretary, JSC) are liaisons to the RDA Development Team, a group managed by ALA Publishing on behalf of the Co-Publishers.

Other JSC liaisons are Alan Danskin to the European RDA Interest Group and ONIX, Gordon Dunsire to the IFLA FRBR Review Group and the ISSN International Centre, and Christine Frodl to the IFLA ISBD Review Group. There are protocols between the JSC and the FRBR Review Group, the ISBD Review Group, and the ISSN International Centre. The RSC will continue to seek collaboration with similar groups responsible for the development and maintenance of bibliographic and other standards related to RDA.

Ongoing *RDA* development

Overall development of RDA will be governed by the work plan. Significant additions and adjustments to the elements and instructions are expected to be completed in the next two or three years. The pattern of updates to RDA Toolkit will continue, with major features introduced in new Toolkit tabs and instructions adjusted with a mix of updates to paragraphs and whole sections.

The RSC will minimize disruption to ongoing use of the Toolkit during this period of development, and workflows for current applications of the instructions are not expected to change overall. Development and maintenance of RDA elements will take place in open view in the RDA Registry before synchronization with the Toolkit and instructions.

Proposals from RDA communities and other groups for the development of RDA, subject to the working principle, will continue to be welcomed, although changes to the procedures for submitting proposals are expected as the governance structure undergoes transition.

RDA Steering Committee

At the end of the last session on November 6, the Joint Steering Committee for Development of RDA became the RDA Steering Committee. Email addresses for the Chair and the Secretary changed to rsccchair@rdatoolkit.org and rsccsecretary@rdatoolkit.org.

At a reception in Edinburgh's City Chambers that evening, more steps were taken to move to the new governance model:

- renaming the JSC as the RDA Steering Committee (RSC)
- renaming the Committee of Principals as the RDA Board
- moving the JSC website to a new domain for the RSC (<http://rda-rsc.org>, with re-directs from the earlier site).

The National Librarian of Scotland, Dr. John Scally, welcomed the JSC and 50 guests to the reception. Simon Edwards, Chair of the RDA Board, and Gordon Dunsire, Chair of the RSC, thanked the National Library of Scotland for its generous hosting of the JSC meeting and thanked the Library and BDS: Bibliographic Data Services for sponsoring the reception.

The first meeting of the RDA Steering Committee will be November 7-11, 2016 in Frankfurt am Main, Germany, hosted by Deutsche Nationalbibliothek.



Dr. John Scally, National Librarian, welcomes guests.



Simon Edwards, Chair of Committee of Principals, makes the name change to RDA Board.



Members of European RDA Interest Group (EURIG) at the reception: Alan Danskin, Irena Kavčič, Françoise Leresche, Marja-Liisa Seppälä, Verena Schaffner, Renate Behrens, Susanne Oehlschläger, Christian Aliverti