

[Note from RSC Secretary: At the October 2018 RSC meeting, for logistical reasons, the reports to the RDA Steering Committee were discussed in Executive Session. Because Executive Session minutes are restricted to RSC members, the reports are being shared here.]

## Reports to the RDA Steering Committee October 2018

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### Report of the RSC Chair for 2017-2018

This report covers the period October 2017-September 2018.

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

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

- 11 Apr 2018: PCC URI Task Group online meeting. Presentation on “Recording RDA data as linked data”.
- 1 May 2018: LD4 workshop, Stanford University, Palo Alto, Calif. USA. Presentation on “RDA Community and linked data”.
- 22 Jun 2018: 2018 ALA Annual pre-conference "A practical introduction to the new RDA Toolkit". Presentations on “From Big Bang to beta: An overview of the 3R Project”, “Dates, approximately”, and “Next steps for RDA content”.
- 23 Jun 2018: RDA Forum, 2018 ALA Annual conference. Presentation on “Content of beta RDA: a brief overview”.
- 25 Jun 2018: Meeting on "RDA and MARC 21", 2018 ALA Annual conference. Presentation with James Hennelly and Thurstan Young on “RDA and MARC 21: The impact of the 3R Project”.
- 25 Jun 2018: RDA Linked Data Forum, 2018 ALA Annual conference. Presentation on “RDA linked data and the new RDA Toolkit”.
- 13 Aug 2018: Australian Committee on Cataloguing seminar "Resource description for the 21st Century", National Library of Australia, Canberra. Presentations on “Introducing IFLA-LRM” and “The new RDA: resource description in libraries and beyond”.
- 16 Aug 2018: CatSIG Development Day, National Library of New Zealand, Wellington. Presentations on “Introducing IFLA-LRM” and “The new RDA: resource description in libraries and beyond”.
- 23 Aug 2018: RDA Board seminar on "Diversity of Data: RDA in the international context", National Library of Malaysia, Kuala Lumpur. Presentations on “RDA and translations” and “Accommodating local cataloguing traditions in a global context” (with Ebe Kartus).
- 25 Aug 2018: World Library and Information Congress. Session 074, Kuala Lumpur, Malaysia. Presentation with Clément Oury on “A model to link them all: IFLA-LRM as a driver for harmonization of cataloguing standards related to serials and other continuing resources”.
- 5-7 Sep 2018: "Metadata: Create, Share and Enrich", CILIP Cataloguing & Indexing Group Conference 2018, Edinburgh, Scotland. Presentations on “Ethical issues in cataloguing” and “The new RDA: resource description in libraries and beyond”.
- 14 Sep 2018: AL Live webinar “What's Next for RDA and the 3R Project?” Co-presented with Thomas Brenndorfer, Kathy Glennan, and James Hennelly.

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

The RSC Chair-Elect, Kathy Glennan, made the following presentations. Those with asterisks may be found on the RSC website.

- 9 Feb 2018: RDA Toolkit Redesign Update and Preview (full-day preconference), ALA Midwinter, Denver, CO. Invited presentation on “Recording Names and Access Points”.\*
- 9 Feb 2018: FRBR Interest Group Meeting, ALA Midwinter, Denver, CO. Presentation on “Instantiating LRM in RDA”.\*
- 10 Feb 2018: RDA Forum, ALA Midwinter, Denver, CO. Invited presentation on “RDA Steering Committee Update”.\*

- 11 Feb 2018: PCC Participants Meeting, ALA Midwinter, Denver, CO. Invited presentation on “RDA, Linked Data, & The 3R Project”.\*
- 12 Feb 2018: RDA Linked Data Forum, 2018 ALA Midwinter conference. Presentation on “RDA and Linked Data”.
- 3 Apr 2018: LC Digital Future & You speakers series, Library of Congress, Washington, DC. Invited presentation on “RDA, Linked Data, & the 3R Project”.
- 3 May 2018: PCC Operations Committee Meeting, Washington, DC. Invited presentation on “A Sneak Preview of the New RDA Toolkit”.

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

- 14 Aug 2018: National Library of Australia, Canberra
- 17 Aug 2018: National Library of New Zealand, Wellington
- [2 Oct 2018: British Library, Boston Spa, England]

The RSC Chair attended meetings of the following IFLA groups during the World Library and Information Congress 2018, Kuala Lumpur, Malaysia (24-29 Aug 2018):

- BCM Review Group (liaison for RSC)
- IFLA Cataloguing Section (member)
- ISBD Linked Data Study Group (member)
- ISBD Review Group (member)
- LIDATEC (member)
- Permanent UNIMARC Committee (liaison for RSC)
- PRESSoo Review Group (member)

The RSC Chair participated in online meetings of:

- RDA Board
- RSC Aggregates Working Group

### ***Administration and development activities***

The RSC Chair participated in online meetings of:

- 3R Project core team
- 3R Project design team
- 3R MARC mappings development group
- RDA Development Team
- RDA Translations Working Group

The RSC Chair liaised with ALA Digital Reference and the RDA Development Team in the continuing development of the RDA content management infrastructure.

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 RDA Translation Team Liaison Officer took over from the RSC Chair as the primary contact for translations of RDA Reference.

The RSC Chair chaired the working groups (dormant because of the 3R Project):

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

Gordon Dunsire  
RSC Chair  
October 1, 2018

## ALA Digital Reference Report to RSC

October 2018

### 3R Status report

The Beta site debuted in June of this year. There has been a considerable amount of feedback on the site, both positive and negative. ALA Digital Reference has set up a submit feedback button on the beta site and receives approximately 4-6 submissions per week. This feedback and feedback from direct emails to RDA Toolkit support are logged on a shared Google spreadsheet that is accessible to the Core 3R team. The feedback has covered a wide number of topics, ranging from correcting typos to improvements to search and display to objections to the data dictionary approach to the new site. This feedback has informed many of the improvements to the October release. It has also provided seeds for future development work.

### Forthcoming Schedule

#### **October release**

There will be a new release to the beta RDA Toolkit on October 9<sup>th</sup>. The release will include several important goals toward the completion of the 3R Project.

- RDA content fully incorporates the text from the original Toolkit. This marks the completion of the “shredding” work.
- User tool development (bookmarks, notes, linking and documents) is completed and tools are functional.
- MARC mappings are more thorough, and the display has been improved.
- Search enhanced for better searching on cataloging terms and instruction numbers from the original toolkit.
- Revision to the homepage based on user feedback.

#### **First Quarter 2019 release**

The next beta release is anticipated in January/February. The 3R team will be working toward the following goals.

- Meet accessibility standards for WCAG’s AA rating
- Introduction of RDA graphical browser for use with RDA entities and elements
- Development of browse options for non-entity related content (e.g. Guidance)
- Improvements to display and navigation of relationship matrix

- Rollout of Citation Numbers solution\*
- Introduction of AACR2 to Beta Site

\*The Citation Numbers solution is meant to address the need for a succinct way of referencing RDA instructions in print resources. A supply of random numbers (6-8 digits separated by periods) will be created, and numbers will be assigned to each citable unit of RDA content (e.g. options and paragraphs). The numbers will be easily accessible for use in print resources and the numbers will be searchable in RDA Toolkit. The citation numbers will be unique, random, and permanent.

With the above goals met, site development for the 3R Project will be complete.

### **Completion of English text**

The completion of a final draft of the RDA revision is the highest priority right now. With a complete and stable RDA text, translation and policy statements can proceed at a pace preferred by each of the responsible parties and the community of catalogers can begin preparation for adopting the revised standard and website.

After consultation with the RSC, it is reasonable to expect that the text will be ready in early 2019. A publicly announced target for the completion of the text would likely calm some anxieties about 3R. At the same time, we need to set a date that is not anxiety inducing for the RSC. An announced target for completion of March/April 2019 is recommended.

### **Registry transfer**

In December of 2017 ALA Digital Reference, in consultation with the RSC Chair, decided to transfer the responsibility for maintenance and support of the RDA Registry to Dakota Systems. Dakota has been the lead developer of our content management and editing/translating Systems since 2015. They will build a new RDA Registry that will become the primary home of the RDA vocabularies. The RDA Registry will remain freely accessible to all. The new Registry will support the core activities and needs of the RDA Registry, RDA Toolkit, and developers of RDA applications (e.g. TMQ). This work has already begun and should be completed before December of this year.

### Schedule Summary

<b>Goal</b>	<b>Target Date</b>
October Release	October 9, 2018
New RDA Registry	December 2018
1 <sup>st</sup> Quarter 2019 Release	January/February 2019
Completion of English Text	March/April 2019

### Criteria for Completion

The completion of the 3R project requires definition. The criteria listed below represent the minimum requirements for completion. ALA Digital Reference projects that the criteria can be met by the end of 2019.

### **Site Development**

- Completion of work described above in “First Quarter 2019 release”.

### **English text stabilization**

- The revised RDA text must be judged to be complete and suitable for cataloging.
- The RSC must issue a public statement authorizing the new RDA text for cataloging use.
- The text must be suitable for translation and evaluation by policy statement writers.

### **Key Translations**

- Finnish, French, German, and Spanish translations are widely used and have related policy statements (except for Spanish).
- All these translations should be complete, published to the beta site, and available for public consumption.

### **Other translations**

- Established translations for Catalan, Italian, and Norwegian should be judged to be within 3 months of completion and publication to the beta site.
- New translations (Hungarian and Arabic) are not considered part of the 3R Project and should not be factored in the determination of the project's completeness.

### **Policy Statements**

- There are 8 established policy statements on the Toolkit. Five of the eight should be complete and published on the beta site.
- The Danish policy statements are not considered part of the 3R Project and should not be factored in the determination of the project's completeness.

### Projected Schedule (this is just a guess)

<b>Goal</b>	<b>Projected Date</b>
Begin Reference Translation	Underway
Complete New RDA Registry	December 2018
Generate Policy Statement Files (More Bang**)	December 2018
Begin RDA Instruction Translation and Policy Statement Production	January 2019
Complete Site Development	January/February 2019
Complete of English Text	March/April 2019
Generate Type 1 and 2 Translated Files ^	April 2019
Completion of 3R, including translations and policy statements	December 2019

\*\* - "More Bang" is the name the 3R Core team has given to a proposed script that would generate the entire file directory needed for a policy statement set. The Script would create the folders and files needed for any policy statement authoring group as well as embedded links to every possible insertion point for a policy statement.

^ - Type 1 and 2 files are element files that are comprised of only RDA reference content and boilerplate text. Once translation teams complete their translation of RDA Reference and boilerplate files, these files can be auto-generated by a script. This will impact approximately 1,000 files and should save a monumental amount of work for translators.

## Other Topics

### **Print Plan and PDFs**

A plan for PDFs and Print will be readied for distribution in Montréal, with the understanding that immediate feedback is not expected.

### **Translations**

Just a reminder that Arabic and Hungarian translations are queued for work after RDA stabilization. Danish policy statements are also new content awaiting stabilization. No further translations or policy statements agreements are imminent.

### **Latin America and the Caribbean Region**

A meeting with ABINIA, a consortia of national libraries and large academic libraries in Latin America, will host a November meeting in Mexico City with the goal of forming an RDA Regional Group. Gordon, Jamie and Ángela Quiroz of the RDA Board, will attend.

## 2018 report of the RSC Secretary

Contributions to the 3R Project:

- Added RDA content to Content Management System (CMS) using DITA markup
  - Supplied new instructions based on patterns established by RDA Chair
  - Transferred and adjusted content from original Toolkit into new structure
- Edited RDA content for consistency in language and markup; provided and fixed links for cross references and re-used content; added navigational aids to files with extensive content; made decisions on copy editor comments in CMS
- Created new CMS files as needed for newly added elements
- Assisted with maintaining DITA maps
- Reviewed and analyzed RDA content to provide information for decisions, and to identify issues following script changes and data re-load
- Provided input into technical decisions (markup choices; script adjustments; file metadata)
- Created and maintained spreadsheets for element editing status to facilitate communication
- Participated in weekly calls about process and content with core team, core team plus, and RSC
- Prepared agendas for calls
- Prepared weekly updates to RSC+ prior to rollout of beta site to communicate decisions and activities
- Organized material in Google Drive for group access
- Established Google Drive folder to facilitate re-use of presentation slides
- Prepared and organized documentation (RDA Editor's Guide) and edited other documentation (CMS Guide; workflows)
- Participated in calls with developers to ask questions and provide feedback
- Assisted with providing sample content for developers
- Trained new core team members in using the CMS

Assisted in planning the 2017 Madrid meeting and 2018 Montreal meeting:

- Planned meeting logistics in collaboration with core team and local hosts

- Assisted Chair in developing the agenda
- Assisted Chair with preparation of briefing papers
- Assisted in planning the meeting of translators in Madrid and the outreach meeting in Montreal

After the October 2017 meeting in Madrid:

- Prepared meeting minutes (restricted version only)
- Assisted Chair with preparation of meeting outcomes
- Prepared article for IFLA Metadata Newsletter based on meeting outcomes
- At the outreach meeting, presented with Kate James on Changes to RDA Content and Examples

As a member of the core team:

- Monitored email communications with the Translations Working Group
- Participated in conference calls with the RDA Development Team
- Reviewed drafts of grants proposal for further RIMMF development
- Provided assistance to ALA staff for national survey requested by RDA Board
- Drafted updates to policy documents
- Assisted in preparation of the RSC Annual Report

To communicate with cataloguing communities:

- Posted documents and presentations on RSC website
- Drafted and posted announcements on RSC website
- Sent email messages about postings to specific lists
- Updated the RSC members page (including historical information) and two FAQs

At ALA Midwinter and ALA Annual meetings:

- Assisted with preconference planning for both meetings
- Presented on Recording Methods, Transcription, and Manifestation Statements at RDA preconference at ALA Midwinter meeting in Denver
- Prepared summaries of RDA meetings for publication in ALCTS News
- Provided consolidated feedback from New Orleans preconference attendee evaluations

Submitted by Linda Barnhart

Secretary, RDA Steering Committee

29 September 2018

## 2018 report of the RDA Examples Editor

### Contributions to the 3R Project:

The RDA Examples Editor's work was heavily focused on the 3R Project. She served as a member of the 3R Core Team and contributed to the intellectual and technical development of the new RDA with these contributions.

- With assistance from Dakota, developed DITA markup for examples
- Created test files in CMS for Core Team discussion of conkeyrefs and keyrefs
- Created new CMS files for examples and added links in element files



- Assisted in proofreading CMS files in preparation for beta Toolkit release
- Participated in weekly calls about process and content with core team, core team plus, and RSC
- Participated in calls with developers about technical and design issues
- Assisted with providing sample content for developers
- Provided feedback for Toolkit development on Trello board

### Documents:

The RDA Examples Editor created or contributed to documents for internal and public use.

- With RSC Secretary, created “Where Did it Go?” handout on deprecated and renamed elements for ALA Annual Preconference. Posted on RSC and RDA Toolkit websites
- Created “Where to Find Examples in the Beta Toolkit” handout for ALA Annual Preconference. Posted on RSC and RDA Toolkit websites
- Contributed to sections of the CMS Guide, an internal document for use by RSC, translators, and policy statement writers

### Presentations:

The RDA Examples Editor made these presentations on RDA topics. (Note: For ALA Midwinter, other RSC members delivered her presentations because she was unable to attend.)

- Feb. 9, 2018: ALA Midwinter Preconference. Presentation on “Representative Expressions” (given by Kathy Glennan)
- Feb. 9, 2018: ALA Midwinter Preconference. Presentation on “Elements, Attribute, Relationships, Oh My!” (given by Linda Barnhart)
- March 20, 2018: Council on East Asian Libraries, Cataloging Workshop. Presentation on “RDA 3R Project: Status Report
- May 2, 2018: FEDLINK Spring Expo. Presentation on “RDA Update: The 3R Project”
- June 22, 2018: ALA Annual Preconference. Presentation on “Basics of Attributes and Relationships”

Submitted by Kate James  
RDA Examples Editor, RDA Steering Committee  
8 October 2018

## 2018 Report of the RDA Translations Team Liaison Officer

### ***Outreach activities***

Presented on RDA at the following conferences and meetings:

- 19 June 2018: ASTED, Montréal, Québec, Canada. Presentation on “Le projet 3R : un avant-goût du nouveau RDA Toolkit”.

- 8 August 2018: IAML Congress, Leipzig, Germany. Presentation on “The Well-Tempered Catalogue: the new RDA Toolkit and music resources” (with Renate Behrens and Damian Iseminger).

Coordinated local arrangement to organize “Le RDA Toolkit repensé : ce qu’il faut savoir pour s’y préparer (The redesigned RDA Toolkit: what you need to know to get ready)” at Bibliothèque et Archives nationales du Québec, October 22.

### ***Liaison activities***

Chaired the following RDA translators meetings:

- 23 October 2017, Madrid, Spain, in conjunction with the RSC meeting.
- 23 May 2018, Ballerup, Denmark, in conjunction with EURIG.

Attended meetings of the core team via conference call starting on March 1, 2018.

Tested how boilerplate files could be integrated into the translation workflow using the SDL Trados Studio translation software.

Attended an online training session given by Gordon Dunsire on managing updates and uploads of translations of RDA vocabularies to the OMR on July 5, 2018.

Created a new discussion list including all translators and a wiki to improve communication between translators and between RSC and translators.

Prepared instructions for translation teams on how to download and translate RDA value vocabularies; instructions and download links were published on the wiki on July 12, 2018, along with comparison reports detailing the changes made since the previous release of the value vocabularies in April 2017.

Attended an online training session given by James Hennelly to the Arabic translation team on August 13, 2018.

Submitted by Daniel Paradis  
RDA Translations Team Liaison Officer  
October 1, 2018

## Report from the Wider Community Engagement Officer 2018

The WCEO was invited to join the weekly 3R Core team phone calls earlier in the year.

The WCEO attended the RDA preconference at ALA Annual as this was the first public event after the release of the beta Toolkit. In discussions during ALA Annual it was suggested that short 5-10 minute videos could be made on various aspects of the Toolkit. The WCEO was asked to construct a list of potential topics which is attached as Appendix A.

With this year's IFLA conference held in Kuala Lumpur a unique opportunity arose to enable the RSC Chair to present in both Australia and New Zealand. Each country's cataloguing group ACOC in Australia and CatSIG in New Zealand organized full day events. Please see the ORDAC report for further information. The Australian presentations were recorded and are available on the ACOC website. The CatSIG presentations are available on their website. The CatSIG event was streamed. The WCEO had a very short presentation on encoding RDA data in MARC and BIBFRAME at both events.

The Diversity of Data event organised by the RDA Board in association with IFLA was well attended. Both the RSC Chair and the WCEO presented in the afternoon. Even though there are a number of countries in South East Asia already using RDA there are more countries showing interest in adopting RDA in the Asian region. Many of these implementations were as a result from trips made by Barbara Tillett when she was Chair of JSC. Another round of visits after the release of the new Toolkit would be advantageous in outlining the new changes that have occurred. These visits could be combined with further training if requested by the libraries.

The event also highlighted extra messaging that will need to be undertaken. One of the biggest issues is the encoding of RDA data and how the data and its encoding can become intertwined in people's minds due to the current Library systems they are dealing with. Although data encoding is out of scope for RDA it will become more of a barrier for RDA adoption since cataloguers will see no 'on the ground' benefit of changing practices to follow the new guidelines and instructions.

In discussions with the RSC Chair during the RDA event and the IFLA conference we came to the conclusion that a book describing how the new Toolkit could be used to create entries for a card catalogue could potentially increase usage of the Toolkit. There are still many non Anglo-American regions that do not yet have automated catalogues. This would be one way in providing more information on exactly what RDA is and it would show the versatility of the Toolkit guidelines and instructions.

The WCEO provided a slide deck of statements on RDA that could form the basis of either a Q&A session or possibly a roundtable discussion to the RSC Chair to road-test at the CILIP Cataloguing and Indexing Group Seminar in September if the opportunity arose.

As an ACOC member the WCEO took part in setting up ORDAC at the end of 2017 and early into 2018. The WCEO was also involved in helping to organize the ACOC seminar *Resource description for the 21<sup>st</sup> century* in August 2018. As an ORDAC member she has taken part in meetings and tasks set by RSC.

Ebe Kartus  
October 2018

## **Appendix A**

Application profiles – what are they and how do they work  
Domain and Range  
What are the various recording methods  
What is a manifestation statement

- What is a representative expression
- How does data provenance work in linked open data Timespan
- How do policy statements work
- Relationship matrix and designators
- What are VES's
  - What if one doesn't exist
- Options – how do these work
- Terminology e.g. entity, element etc.
- How does data move from system to system (for the Toolkit)
- Names and access points
- Diachronic works
- Serial works
- Cardinality
- LRM?
- How to use the Toolkit for a card catalogue?

## Europe Region Representative

14. September 2018

### EURIG report to the RSC



RDA has become a standard used in many national or language-based communities across

the world and EURIG, with 45 members in 27 countries, has become a reliable partner in the “RDA family”.

In the wake of the organizational change in the RDA Board and the RDA Steering Committee, EURIG fulfilled its commitment to develop from an interest group into a decision making body over the last few years. With this year's nomination of the European Region Representative (following several years as the Interim Region Representative) this process has come to an end. EURIG has become a stable partner in the RSC and supports many RDA communities in Europe. The exchange of experience remains important, but the wish to craft European solutions and decisions has become of major significance.

Though some communities have concerns that their special or national requirements may not be of the highest concern any longer, more and more communities have become comfortable with the new structure.



The European RDA Interest Group (EURIG) had its annual meeting on May 24th and 25th, 2018, in Copenhagen, Denmark. During the meeting an agreement was reached on a course of action to follow the first 3R Toolkit release in June and members of EURIG expect to work together closely over the coming years of the post-3R phase. EURIG members have agreed to greater cooperation and to the establishment of European working groups when suitable but at the same time to prioritise direct participation in the international RSC working groups.

For the first time a substantial part of the EURIG meeting was given over to a workshop on further work based on the 3R project plan. The unanimous view of all members of EURIG was that it would be difficult to plan local, national, and language-based 3R projects given the current situation. This has been confirmed when the beta-version was released with sections of the text and examples missing. EURIG has been told that between the release of the beta-version of the RDA Toolkit and the official end of the 3R project changes to the text are possible. This has implications for all our planning, for translations as well as for the adaption of policy statements and application profiles.

A separate meeting of RDA translators preceded the EURIG meeting and was, once again, an ideal platform for discussion, information exchange, and support for all who are engaged in translating RDA texts, whether in full or as partial translations.

EURIG follows with great interest the steps of the 3R project and the EURIG Editorial Committee is participating in the 3R review process. Members will provide comments on and assessments of the Entity chapters in the new RDA Toolkit.

Many national or language-based communities in Europe are planning their post-3R projects. These

may start with translations and work up to real adaption projects for those who had already implemented RDA. As the English text is not yet stable, this planning is difficult and is the subject of a degree of uncertainty. The project managers for these adaption projects have to inform their institutions and communities that something must happen, but are not able to say exactly what or when. Therefore, EURIG has sent a statement to the RDA Board and the RSC highlighting the problematic nature of this situation.

Nevertheless, the members of EURIG are well prepared for the new RDA Toolkit and will fulfil the changes in as cooperative a manner as possible. An example of this European approach is the agreement of EURIG members to work as closely as possible in creating the application profiles which will be needed after the final release of the new RDA Toolkit.

Respectfully submitted

Renate Behrens (Europe Region Representative)  
Ahava Cohen (Backup to the Europe Region Representative)

## ORDAC report to the RDA Steering Committee, 2017-2018

ORDAC has continued to refine its working procedures, while also discussing more conceptual issues, and offering feedback to the RSC where appropriate. We have publicised developments with the redesigned RDA Toolkit, and helped organise seminars. We have also begun exploring ways to further reach out to library communities in Australia, New Zealand and Oceania.

### **Communications**

Communications have been through a combination of email discussion, teleconferences, and contributions to a shared wiki. ORDAC met approximately monthly in 2017 and 2018. Meetings have included regular reports from the RSC representative, the RDA Board representative (as appropriate), and members of the Working Group on Aggregates. We enjoyed discussing RSC and RDA matters in person with Gordon Dunsire on 14 August 2018. ORDAC has also engaged in some interesting conversations in relation to the RDA Toolkit, and we plan to focus more on theoretical issues at future meetings.

### **Contributions to the RSC**

Several ORDAC members belong to the Working Group on Aggregates, and ORDAC discussed the draft chapter on aggregates in 2017, offering feedback to the RSC.

ORDAC has commented on RSC working papers and the Beta Toolkit when invited. Areas where the group has offered feedback include: the “boilerplate” language for relationship elements, and the inclusion of MARC 21 mappings in the Element Reference.

### **Documentation**

Much of ORDAC’s initial work focussed on putting together our [Terms of Reference](#). These aim to highlight local issues, and foster a spirit of open collaboration and inclusion in the RDA community. A draft was sent to the RDA Board in November 2017, and approved in January 2018. We hope that our Terms of Reference may offer a model for other regions that are not yet represented.

ORDAC has also begun drafting a Working Procedures document, describing processes for nominations, the election process, succession planning, and the pathway of member nations to put forward candidates for consideration as ORDAC representatives.

A separate work plan has been drafted to cover issues such as ORDAC's priorities, goals, content development, communications, reporting, outreach and international relations.

In May 2018 we published a sub-page on the RSC website with brief details about ORDAC, its purpose, and contact details: <http://www.rda-rsc.org/oceania>

### **Representation**

We are now working to seek more diverse representation from within Australia and New Zealand, and also by inviting other institutions in the Pacific. We are consulting with contacts in the Pacific, such as the University of the South Pacific.

### **Outreach**

ORDAC has publicised RDA developments within the Australasian cataloguing communities, forwarding information about training opportunities such as the 20 March RDA Toolkit webinar. Attendance was excellent at the March webinar, with over 180 people or institutions watching on the day across Australia and New Zealand. A good cross-section of library types was represented, and there was also a wide geographical reach.

ORDAC members helped organised RDA Toolkit seminars for cataloguers at the National Library of Australia and the National Library of New Zealand on 13 and 16 August 2018. Gordon Dunsire, Ebe Kartus, and Deborah Fritz were keynote speakers, and ORDAC members delivered sessions at both events. The New Zealand seminar sold out with 77 people attending in person, and 45 joining the live-stream event. 89 people attended the ACOC event in Australia. Feedback from attendees suggests they found both events engaging and useful, and we noted an encouraging level of interest in the redesigned Toolkit. The recordings of the [Australia seminars](#) have been posted online, and articles in the September issue of [Catapult](#) (the LIANZA Cataloguing Special Interest Group newsletter) further highlighted the topics discussed.

ORDAC is planning a survey to gain more detail about RDA implementation in the region. This will follow on from the pre-IFLA RDA survey, with more detail and focus on Australia and New Zealand to gauge current engagement with RDA and potential training needs. We are hoping to send this out in late 2018. We are also exploring other ways to promote and communicate about RDA in Oceania, such as talking with contacts at the University of the South Pacific. We hope to make contact with Pasifika and Australian indigenous librarians at the International Indigenous Librarians Forum in 2019 and at IFLA in Auckland in 2020.

The coming year promises to be a very interesting and busy one for ORDAC.

## **North American RDA Committee Representative Report to RSC**

28 September 2018

### **Background**

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

### **Membership**

The current membership of NARDAC consists of: two representatives from the American Library Association (Dominique Bourassa, Yale University, and Kathy Glennan, University of Maryland); two representatives from the Canadian Committee on Cataloguing (Thomas Brenndorfer, Guelph Public Library, and Nathalie Mainville, Library and Archives Canada); and two representatives from the Library of Congress (Damian Iseminger and Kate James).

NARDAC members met virtually via GoToMeeting five times in 2018: February 28, April 4, May 25, July 13, and September 7. Among the initial activities were a review of NARDAC's term of reference, the establishment of a shared online workspace, and agreement on the following roles:

- NARDAC chair: Dominique Bourassa
- NARDAC representative to the RSC: Thomas Brenndorfer
- NARDAC backup representative to the RSC: Kate James
- Coordinator of web content: Damian Iseminger

### **NARDAC Activities**

Despite a hiatus on new proposals for additions or revisions to RDA, NARDAC received several change requests. After a discussion, the committee agreed that:

- If a NARDAC member receives a proposal that cannot go forward, the member should consult with other NARDAC members who will confirm. The NARDAC member will then contact the person who made the proposal to explain why the proposal cannot move forward.
- If a NARDAC member receives a proposal that has the potential to succeed, the member will refer the person who made the proposal to the appropriate group (CCC for a Canadian proposal; CC:DA for a U.S. proposal; LC for an LC proposal), and copy either all NARDAC members or the representatives of that group.
- NARDAC's messaging is that, even if a proposal has potential, nothing will happen while development of the RDA beta site continues.

Part of the charge of NARDAC is to keep the North American communities informed of RDA developments. Dominique Bourassa gave a presentation on NARDAC at the RDA Forum held June 23, 2018, during the American Library Association conference in New Orleans, Louisiana. Two NARDAC members, Nathalie Mainville and Dominique Bourassa, have prepared to present at an RSC outreach event to the francophone community in Montreal on October 22, an event which is attached to the annual RSC meeting.

NARDAC has participated in the development of the new RDA Toolkit in several ways. Two members, Kathy Glennan and Kate James, are members of the RSC Core Team and have updated NARDAC on the RDA beta site. Thomas Brenndorfer has taken on an RSC project to review appellation elements (which include identifiers, names/titles, and access points). NARDAC also reviewed boilerplate language in response to a request for feedback from the RSC.



Two NARDAC members, Thomas Brenndorfer and Kathy Glennan, along with Gordon Dunsire and Jamie Hennelly, participated in the American Libraries Live webinar “What’s Next for RDA and the 3R Project?” on September 14 (accessible at <https://americanlibrariesmagazine.org/al-live/>). Approximately 750 attendees joined the live presentation, with more viewings expected of the archived webinar.

Respectfully submitted

Thomas Brenndorfer (NARDAC Representative to the RSC)

## Report of the RSC Aggregates Working Group (AWG) for the October 2018 RSC meeting in Montreal, Canada

Submitted by: Deborah Fritz, Aggregates Working Group Chair

Date: September 29, 2019

As requested by the RSC Secretary, this is a report of activities of the AWG, since the 2017 RSC meeting in Madrid.

- The Aggregates Working Group members:
  - o held online meetings:
    - Dec 19, 2017 (U.S. and European members)
    - Dec 19, 2017 (U.S. and Oceania members)
    - Apr 11, 2018 (U.S. and Oceania members)
    - Apr 12, 2018 (U.S. and European members)
  - o Provided informal feedback to LRM Consolidated Editorial Group resulting in publication of amendments to the LRM in December 2017
  - o Submitted “Describing Works, Expressions, Manifestation, and Items” document to the RSC Chair on April 17, 2018.
  
- The Serials Task Force consisting of Ed Jones (Leader, AWG member), Clément Oury (ISSN center, AWG member, Deborah Fritz (AWG Chair), Gordon Dunsire (RSC Chair):
  - o Formed in Dec 2017
  - o Met online on Dec 28, 2017 to introduce the new thinking on aggregates to the two Task Force members (Regina Reynolds and Les Hawkins) who were not AWG members
  - o Held weekly online meetings, from Jan 5, 2018 to Mar 30, 2018
  - o Submitted “Recommendations of the Serials Task Force” to the RSC Chair on Apr 7, 2018 (see Appendix A)
  - o Co-authored the IFLA paper presented by Gordon Dunsire and Clément Oury, “A model to link them all: IFLA LRM as a driver for harmonization of cataloguing standards related to serials and other continuing resources”<sup>1</sup>

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<sup>1</sup> <http://library.ifla.org/2235/1/074-dunsire-en.pdf>

- Regina Reynolds and Les Hawkins were invited to join the AWG to continue to contribute to development guidance and instructions for aggregates and serials in the 3R Toolkit.
- The AWG Chair and RSC Chair worked together on implementing the following in the 3R RDA Toolkit:
  - the STF recommendations
  - the AWG “Describing Works, Expressions, Manifestation, and Items” document
  - recommendations for changes to the Appendices of the “Impact of the LRM on aggregates and serials in RDA” document <sup>2</sup>
    - “Appendix D: Expression-to-Expression relationships” (submitted Apr 21, 2018)
    - “Appendix G: Work-Agent relationships” (submitted Apr 24, 2018)
    - “Appendix H: Expression-Agent relationships” (submitted Apr 24, 2018)
    - “Appendix C: Work-to-work relationships” (submitted May 2, 2018)
- The AWG Chair and RSC Chair are still working on wording for the following Guidance chapters:
  - Describing works
  - Describing expressions
  - Describing manifestations
- Members of the AWG gave the following presentations:
  - Ed Jones (Serials Task Force Leader) “[The Modeling of Serials in IFLA LRM and RDA](#)”; RDA preconference at ALA Midwinter meeting 2018 (19 February 2018) <sup>3</sup>
  - Deborah Fritz (AWG Chair) “[The treatment of aggregates and serials in the new Toolkit](#)”; RDA preconference presentation at ALA Summer 2018: (22 June 2018) <sup>4</sup>
  - Clément Oury (AWG member) “[Diachronic Works: Future Development from the ISSN International Centre Perspective](#)”; RDA preconference at ALA Midwinter meeting 2018 (19 February 2018) <sup>5</sup>
  - Deborah Fritz (AWG Chair) “[Dipping into describing works with aggregating and diachronic plans using the new RDA Toolkit](#)”; at “Resource Description for the 21st Century”, 13 August 2018, at the National Library of Australia in Canberra, ACT <sup>6</sup>
  - Deborah Fritz (AWG Chair) “[Dipping into describing works with aggregating and diachronic plans using the new RDA Toolkit](#)”; at CatSIG Professional Day, 16 August 2018, at the National Library of New Zealand in Wellington, NZ <sup>7</sup>
- The AWG Chair provided Outstanding issues for the AWG:

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<sup>2</sup> <https://docs.google.com/document/d/1qWwVooJ6kPaAYXKjyKugoKj0iGXxGZPY1pAxuv1swoM/edit>

<sup>3</sup> <http://www.rda-rsc.org/sites/all/files/Modeling%20of%20serials.pdf>

<sup>4</sup> <http://www.rda-rsc.org/sites/all/files/Aggregates%20and%20serials.180628.pdf>

<sup>5</sup> [http://www.rda-rsc.org/sites/all/files/ALA\\_RDAToolkit\\_ISSN\\_OURY.pdf](http://www.rda-rsc.org/sites/all/files/ALA_RDAToolkit_ISSN_OURY.pdf)

<sup>6</sup>

[https://www.nla.gov.au/sites/default/files/acoc/acoc\\_2018\\_dipping\\_into\\_diachronic\\_and\\_aggregating\\_works.pptx#overlay-context=acoc/resource-description-for-the-21st-century](https://www.nla.gov.au/sites/default/files/acoc/acoc_2018_dipping_into_diachronic_and_aggregating_works.pptx#overlay-context=acoc/resource-description-for-the-21st-century)

<sup>7</sup> [https://describenz.squarespace.com/s/Dipping-into-diachronic-and-aggregating-works1808016\\_2.pptx](https://describenz.squarespace.com/s/Dipping-into-diachronic-and-aggregating-works1808016_2.pptx)

- Finalize base wording for:
  - Guidance: Aggregates and diachronic works
  - Describing works, Describing expressions, Describing manifestations
- Identify and make suggestions for amendments to RDA instructions relating to aggregates and diachronic works, including:
  - Instructions re.:
    - Recording changes
    - Numbering of serials and series
  - Use of terms such as:
    - “multipart monographs”, “serials”, “integrating resources”
    - “collections”, “parts”, “components”, “aggregates”
  - Elements related to aggregation:
    - Illustrative content / supplementary content / sound content Expression elements
  - Special topics:
    - Conventional collective titles
    - “Bound withs”
    - “Accompanying material”
    - “Amalgamated content” and “Aggregated content”/ “Composite content”

## Appendix A

### Recommendations of the Serials Task Force

#### 1. General chapter

- a. What is the cataloger describing?  
[Perhaps use module 2 (What is a serial?) of the CONSER Cataloging Manual, especially as a basis for this section  
[https://www.itsmarc.com/crs/mergedprojects/conser/conser.htm#conser/module\\_2\\_ccm.htm](https://www.itsmarc.com/crs/mergedprojects/conser/conser.htm#conser/module_2_ccm.htm).]
- b. Characterizing diachronic Works
  - i. A diachronic Work is intended to be issued over time, perhaps indefinitely, either through the issuing of discrete content units or through the integration of new content with existing content.
  - ii. Whether or not a diachronic Work will be issued indefinitely is known as its extension termination:
    - 1. Determinate (the period of extension of the content has a predetermined end)
    - 2. Indeterminate (the period of extension of the content has no predetermined end)
  - iii. The means by which a diachronic Work extends its content is known as its extension mode:
    - 1. Succession (extension through the successive release of discrete segments, parts, issues, volumes, supplements, etc.)
    - 2. Integration (extension through the integration of added content)
  - iv. Characterizing diachronic Works along these two dimensions produces the four diachronic extension plan values identified for that element (see below under 2.

Entity chapters, a. New element: Extension plan (Work attribute)) and defined in the Glossary (see below under 4. Glossary)

- c. When to describe a new diachronic work
  - i. [Note: This section is intended to minimize any disruption to current practice while complying with the spirit of IFLA LRM. Any changes beyond this require formal community input that is not possible within the timeframe of the 3R Project.]
  - ii. A specific title proper must be identified and selected, applying the criteria currently at RDA 2.2.2-3 (selecting among multiple sources) and 2.3.2.4-5 (selecting among multiple titles), to provide a basis for determining when a major change has occurred
  - iii. Conditions that trigger a new description
    - 1. Serial Works: conditions currently enumerated at RDA 1.6.2 (Changes Requiring a New Description: Serials)
      - a. Optionally, for *determinate* successive diachronic works: restrict conditions to those currently enumerated at RDA 1.6.1 (Changes Requiring a New Description: Multipart Monographs)
    - 2. Integrating (determinate and indeterminate) Works: conditions currently enumerated at RDA 1.6.3 (Changes Requiring a New Description: Integrating Resources)<sup>8</sup>
      - a. Optionally: conditions currently enumerated at RDA 1.6.2 (Changes Requiring a New Description: Serials) [to accommodate ISSN Manual practice]
  - iv. An option will allow a given implementation to define its own criteria for when to describe a new diachronic work
- d. How to select the basis for identification of the manifestation [i.e. the basis of the description]
  - i. For serial Works, the basis will be left up to the implementing agency. While RDA 2.1.2.3 currently prefers the lowest numbered issue or part, the RSC believes RDA can accommodate other practices, such as using the latest issue as the basis (a practice preferred by libraries in German-speaking countries).<sup>9</sup>
  - ii. For integrating (determinate and indeterminate) Works, the basis will be the current iteration (no change from RDA 2.1.2.4)
- e. How to cluster diachronic works
  - i. [Note: While this mechanism appears in IFLA LRM in the context of serial works, RSC has decided to generalize it for all entities in RDA. It will therefore be described in that context.]
  - ii. The fine details of the clustering mechanism will be hammered out by RSC
  - iii. Any RDA entity can be clustered on any criterion at the discretion of an implementing agency

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<sup>8</sup> RDA 1.6.3.4 currently calls for a new description for integrating resources on the same basis as for serials when the edition statement changes. This seems problematic (an analogous change in title proper does not trigger a new description)

<sup>9</sup>“First Issue vs. Latest Issue”, News & Announcements (Joint Steering Committee for Development of RDA), 14 December 2012 <http://www.rda-jsc.org/archivedsite/firstissue.html>

- iv. An entity can be a member of more than one cluster (e.g., the [1] print version of a television program guide for the [2] greater Ottawa region aimed at [3] French-speaking viewers)
  - v. An implementing agency assigns the same nomen-string to each member of a cluster
  - vi. When a nomen-string is used to cluster entities, an implementing agency assigns the following properties to the related nomen:
    - 1. nomen-string
    - 2. assigning agency
    - 3. context of use (e.g., local edition cluster). An RDA value vocabulary may need to be elaborated
2. Entity chapters: How the instructions flow
- a. New element: Extension plan (Work attribute) [see Glossary definitions below]
    - i. static Work
    - ii. integrating determinate Work
    - iii. integrating indeterminate Work
    - iv. successive determinate Work
    - v. serial Work
  - b. Distribution among WEM entities of elements with diachronic aspects
    - i. Where an element already belongs to a specific WEM entity for static resources, that element will belong to the same entity for diachronic resources
    - ii. Where an element is not used by static resources, that element will belong to the Work entity for diachronic resources.
      - 1. Frequency
      - 2. ISSN and related elements (ISSN, ISSN-L, key title, abbreviated key title) assigned to a serial by the ISSN Network
      - 3. Note: Frequency, ISSN, etc., statements appearing on the Item will be transcribed in analogous elements belonging to the Manifestation entity
  - c. What do instructions for elements with a diachronic aspect look like?
    - i. [Note: This section is intended to enable the use of a boilerplate solution for recording the diachronic aspect of any element]
    - ii. Any element that belongs to a diachronic resource has a diachronic aspect
    - iii. Each instance of such an element should be paired with a related element specifying the Timespan or issues / iterations that the instance applies to
    - iv. This pairing is mandatory for each diachronic instance of the element (e.g., the earliest and latest title proper should each be related to a specific Timespan or specific issues / iterations) [Note: Currently, elements that constitute areas 1-6 of the International Standard Bibliographic Description (ISBD) are not specifically paired with a Timeframe or issues / iterations, with a separate note identifying an issue with which they are collectively paired (RDA 2.17.13.3)]
    - v. Each instance of a diachronic element pair (e.g., issuing body and related timespan) is recorded separately (no consolidating of multiple instances in a single element as is customary in traditional notes documenting change over time)
    - vi. Sample boilerplate text: Record a new instance of {element} or a change in the value of {element} if considered important for identification or access. Record

the new value as a new instance of {element} and relate it to the timespan or units for which it is valid. Retain earlier instances of {element}. [Question: What is the rationale behind the current instruction to convert earlier instances of a specific title element to instances of the more generic variant title element?]

3. Relationships among diachronic works
  - a. Relationships between serial Works other than LRM-R20 (accompanies / complements) relationships will be modeled as transformations (LRM-R22) in RDA.
  - b. Except where [new] all relationships below are from Impacts paper appx. C.
  - c. Question for RSC: What is to become of *rdaw:P10170 is succeeded by (work)*, which includes both LRM-R22 *is a transformation of / was transformed into* and LRM-R19 *precedes / succeeds*?
  - d. E2 Work R20 *accompanies / complements* Work
    - i. *[is] augmented by (work)*
      1. *[has] supplement (work)*
    - ii. *[is] issued with (work)* [new]
  - e. E2 Work R22 *is a transformation of / was transformed into* E2 Work
    - i. *[has] transformation due to change or variation of policy*
      1. *[has] sequential work relationship* [Impact paper, appx C]
        - a. *[is] continued by (work)*
        - b. *[is] continued in part by (work)*
        - c. *[is] succeeded by (work)*
        - d. *[is] split into (work)*
        - e. *[is] merged to form (work)*
        - f. *[is] absorbed by (work)*
        - g. *[is] absorbed in part by (work)*
        - h. *[is] substitution for (work)* [new]  
[scope: a Work that temporarily takes the place of a suspended Work]
        - i. *[is] replaced by (work)*  
[scope: a Work that replaces or supersedes an earlier Work.  
Examples: a loose-leaf publication that is re-based, an online integrating work that is replaced whenever a new edition of a print analog is published]
        - j. *[is] replaced in part by (work)*
      2. *[has] symmetrical work relationship* [new]
        - a. *[is] other version of (work)* [new]
          - i. *[is] other language version of (work)* [new]  
[scope: includes diachronic Works that are currently treated as Expressions that are translations of other Expressions]
          - ii. *[is] other carrier version of (work)* [new]
    - ii. *[has] transformation due to change of extension plan* [new]
      1. *[has] sequential version (work)* [new]  
[scope: a successive version of an integrating Work (e.g., archive of selected iterations of online integrating Work, such as a website; annual physical volumes of online integrating Work, such as a directory)]

2. *[has] static version (work) [new]*  
[scope: a static version of an integrating Work (e.g., reprint of an updating looseleaf volume)]
3. *[has] serialized version (work) [new]*  
[scope: a serialized version of a static Work (e.g., a novel initially published as a sequence of instalments in a periodical)]  
[note: unlike the other relationships listed here, this one is between a diachronic Work and a static Work. This may need refinement by the AWG as the relationship may actually be between a diachronic Work and a static Expression]

#### 4. Glossary

- i. **continuing Work.** An indeterminate Work. Includes serial Works and indeterminate integrating Works
- ii. **diachronic Work.** A Work intended to be issued over time
- iii. **integrating determinate Work.** An extension plan where a diachronic Work that is intended to be realized in one distinct Expression is embodied during a closed Timespan
- iv. **integrating indeterminate Work.** An extension plan where a diachronic Work that is intended to be realized in one distinct Expression is embodied during an open Timespan
- v. **serial Work.** An extension plan where a diachronic Work that is intended to be realized in multiple distinct Expressions is embodied during an open Timespan, i.e. a successive indeterminate Work. A serial Work is a special case of **aggregating Work** where the content of individual issues is aggregated. The plans of the individual issues are inspired by the plan of the overall serial Work, and the individual issues are themselves **aggregating Works**. In a departure from the strict definition of **aggregating Work**, an issue of a serial Work may occasionally aggregate a single expression. [Note: the AWG Chair favors a label other than “serial Work” to characterize a successive indeterminate Work]
- vi. **static Work.** A Work intended to be realized in one or more distinct Expressions, all embodied simultaneously.
- vii. **successive determinate Work.** An extension plan where a diachronic Work that is intended to be realized in multiple distinct Expressions is embodied during a closed Timespan.
- viii. **transformation.** The relationship between one diachronic Work and another, excluding accompanying Works. The Works involved may have come into existence sequentially or simultaneously. The transformation may be the result of change or variation of content.

## RSC Capitalization Instructions Working Group

### Report to RSC October 2018

Due to the focus on the 3R project, the Capitalization Instructions Working Group has not undertaken any activities since the RSC meeting in Madrid in October 2017.

The latest Membership and Tasks are published as RSC/Chair/8/2017 (25 April 2017).

The members remain convinced of the relevance of their mandate, adapted as needed in the new structure of the RDA Toolkit.

**Submitted by**

Pat Riva  
Chair, Capitalization Instructions Working Group  
3 October 2018

## Report of the Fictitious Entities Working Group

The Fictitious Entities Working Group (FEWG) presented its recommendations to the RDA Steering Committee (RSC) and the RSC+ group at the Madrid meeting in Fall, 2017. At the end of the Madrid meeting the RSC+ experiment was ended and the FEWG was unofficially discharged by the RSC Chair. There were, therefore, no further tasks assigned to or completed by the FEWG for the remainder of 2017-2018. We expect the FEWG to be officially discharged at the Montreal meeting in October, 2018.

Respectfully submitted,

Amanda K. Sprochi

## RSC Music Working Group: 2018 annual report

**To:** Gordon Dunsire, Chair, RDA Steering Committee

**From:** Damian Iseminger, Chair, RSC Music Working Group

Due to the 3R project, no tasks were carried out by the Music Working Group.

The chair participated in 3R related activities as requested by the 3R Core Team.

The chair, along with RSC Members Renate Behrens and Daniel Paradis, gave a presentation on the Beta RDA Toolkit and its impacts on music cataloging at the IAML Congress, Leipzig, Germany, 27 July 2018.

## Report of the RSC Places Working Group for 2017-2018

The working group did not undertake any activities between October 2017 and September 2018 because of the 3R Project.



Gordon Dunsire  
Chair, RSC Places Working Group  
October 1, 2018

## Rare Materials Working Group 2018 report

**To:** Gordon Dunsire, Chair, RDA Steering Committee

**From:** Francis Lapka, Chair, RSC Rare Materials Working Group

Due to the 3R Project, the Rare Materials Working Group has not carried out any tasks since the 2017 RSC meeting in Madrid.

## RSC RDA/ONIX Framework Working Group Report

The current Membership and Tasks are published as RSC/Chair/2/2017.

The Group has not undertaken any activity due to the focus on 3R.

Alan Danskin  
Chair, RSC RDA/ONIX Framework Working Group  
26 September 2018

## Report of the RSC Relationship Designators Working Group for 2017-2018

The working group did not undertake any activities between October 2017 and September 2018 because of the 3R Project.

Gordon Dunsire  
Chair, RSC Relationship Designators Working Group  
October 1, 2018

## Report of the RSC Technical Working Group for 2017-2018

The working group did not undertake any activities between October 2017 and September 2018 because of the 3R Project.

Gordon Dunsire  
Chair, RSC Technical Working Group

October 1, 2018

## Report of the RSC Liaison to IFLA Bibliographic Conceptual Models Review Group for 2017-2018

The IFLA Bibliographic Conceptual Models Review Group held two meetings during WLIC 2018 in Kuala Lumpur, Malaysia.

Pat Riva gave a progress report on the development of the “object-oriented” version of the IFLA Library Reference Model (LRMoo). LRMoo will replace FRBROO in the context of the CIDOC Conceptual Reference Model (CRM) by applying the LRM and generalizing FRBROO properties. The impact on the LRM itself will be minor.

Pat Riva gave the Casalini Libri 2018 *Lectio magistralis in biblioteconomia* on “The IFLA Library Reference Model”. The published paper is freely available at <https://www.torrossa.com/resources/an/4302108>. The meetings had informal discussions on the development of RDA as an implementation of the LRM.

An understanding of the LRM is seen as essential for effective use of the new RDA Toolkit. Training materials for RDA that include the LRM may be useful for the promotion of the LRM and related IFLA standards.

The BCM Review Group agreed that it would be more appropriate for the PRESSoo Review Group to report to it rather than the IFLA Cataloguing Section.

The protocol between the RSC and the BCM Review Group is being revised to reflect the change in name of the Review Group and the replacement of the FR family of models by the LRM as the conceptual model behind RDA.

Gordon Dunsire  
RSC Liaison to IFLA Bibliographic Conceptual Models Review Group  
October 1, 2018



International Federation of  
Library Associations and Institutions

**ISBD Review Group**  
<https://www.ifla.org/isbdrg>

**ISBD Editorial Group**

## Terms of reference

### Background

The International Standard Bibliographic Description (ISBD) is intended to serve as a principal standard to promote universal bibliographic control, that is, to make universally and promptly available, in a form that is internationally acceptable, basic bibliographic data for all published and unpublished<sup>1</sup> bibliographic resources in all countries. From the beginning, the main goal of the ISBD has been to provide consistency when sharing bibliographic information.

The ISBD is the only freely accessible and open standard maintained by IFLA that determines the data elements to be transcribed and recorded as the basis of the description of the resource being catalogued. Its existence corresponds to the IFLA objective of providing accessible and open standards and tools for all, including communities that need simple and easy to use rules for describing resources. In addition, it employs prescribed punctuation and a specific sequence of recording information as a means of identifying and displaying data elements and making them understandable independently of the language of the description.

The need to revise the ISBD has been recognised for several years by the library community as a whole, and by the relevant expert bodies within IFLA (especially the Cataloguing Section, the Committee on Standards, and the ISBD Review Group).

- There is a general need to revise IFLA standards periodically in order to ensure that they remain up-to-date and that they continue to answer to the needs of their user communities.
- Since the ISBD Consolidated Edition was published in 2011, the ISBD Review Group has received several comments and revision requests.
- The ISBD should be aligned with the overarching conceptual model provided by IFLA, the IFLA Library Reference Model.
- The content of the ISBD should be extended in order to include a larger array of resources, especially unpublished resources.

### Scope

After the approval of the *Proposed work plan for ISBD revision 2018-2022*<sup>2</sup> by the IFLA Committee on Standards on 24 August 2018, the ISBD Review Group has appointed an ISBD Editorial Group (IEG) with the following tasks:

1. review the impact of the manifestation entity of the IFLA LRM on the current text of the ISBD Consolidated edition;
2. identify the parts of the ISBD Consolidated edition where revisions should be considered;
3. take into account the comments and revision requests received since 2011;
4. make recommendations for the future display of the ISBD;
5. produce a draft revision of the ISBD.

### Timeline

The group is expected to complete the work and submit it to the ISBD Review Group by April 2020.

Within this timeline, the group is expected to report regularly to the ISBD Review Group.

## Membership

Members of the group are:

Renate Behrens  
Elena Escolano  
Dorothy McGarry  
Rehab Ouf Clément  
Oury  
Mélanie Roche (chair)

## Proposed workflow

The Editorial Group will be supported by content groups focusing on special topics.

Established in Kuala Lumpur 30  
August 2018

## Background

These terms of references were worked out during the IFLA WLIC 2018 in Kuala Lumpur, and in a work meeting on the proposed ISBD revision on Thursday, 30 August, 2018, in the National Library of Malaysia. Further workflows of the ISBD Editorial Group (IEG) will be developed and meetings of the group will be held in the next future.

- Mélanie Roche from the Bibliothèque nationale de France was accepted as chair.
- It was agreed that the timeline needs not be more detailed for a broad-scale document such as Terms of Reference, but the group will, of course, need to come up with a refined timeline to organise the work amongst themselves.
- The group was reminded that the specialist content groups will start working in 2020. By then the IEG will need to identify and establish liaisons with the specialist content groups.
- The group will have two in-person meetings a year, starting with a meeting in Autumn 2018. IFLA provides funding for these meetings.
- The goals of the first meeting are to brainstorm about the future structure of the ISBD and to solve some essential, strategic questions that will shape the future of ISBD.
- At the end of the autumn 2018 meeting the IEG is expected to provide recommendations to the ISBD RG as to what the future direction of the ISBD should be.
- The group will organize online workspaces for collaboration and for web conferences.
- The current text of the ISBD is based on the ICP principle of “representation”, but the future version should also explicitly refer to the principles newly-introduced to the ICP such as “accessibility”, “interoperability”, and “openness”.

- While revising the text, the group should use plain language, which is easy to understand, so as to speak to the audience of the text (cataloguers). This was the direction taken by the ICP when it was revised in 2017, as well as by RDA with the 3R project. Common language will also facilitate future translations of the text.
- Unless a member of the IEG objects, in-person meetings will be open to observers. This will help advertise the ongoing work and allow for transparency in work, as per IFLA directives. So as to guarantee efficient meetings, the observers won't be able to comment but may always approach the IEG members during breaks or at other times.
- Communication about the work of the IEG will take place via IFLA communication channels as well as via social media or other channels as relevant.

13, September 2018  
Renate Behrens (RSC liaison to the ISBD RG)

## Report of the RSC Liaison to IFLA Permanent UNIMARC Committee for 2017-2018

The IFLA Permanent UNIMARC Committee (PUC) held an informal meeting during WLIC 2018 in Kuala Lumpur, Malaysia.

The PUC continues to await a decision by IFLA on support for the IFLA namespaces. There has been no change in the status of the UNIMARC value vocabularies that are of interest to RDA, including Medium of Performance. These value vocabularies cannot be recommended or otherwise endorsed by the new RDA Toolkit until future stability is guaranteed.

A final draft of a protocol between the RSC and the Permanent UNIMARC Committee was agreed by the meeting. The protocol will be circulated to the RSC for final approval.

Gordon Dunsire  
RSC Liaison to IFLA Permanent UNIMARC Committee  
October 1, 2018

## Report of the RSC Liaison to IFLA PRESSoo Review Group for 2017-2018

The IFLA PRESSoo Review Group held an informal meeting during WLIC 2018 in Kuala Lumpur, Malaysia.

PRESSoo will remain as a separate extension of the CIDOC CRM and will not be absorbed into development of the object-oriented version of the LRM (LRMoo) which will replace FRBRoo.

There has been no further development of PRESSoo.

The PRESSoo Review Group agreed that it would be more appropriate to report to the Bibliographic Conceptual Models Review Group rather than the IFLA Cataloguing Section.

A draft of a protocol between the RSC and the PRESSoo Review Group is still in preparation. The protocol will take into account the developments noted above.

Gordon Dunsire  
RSC Liaison to IFLA PRESSoo Review Group  
October 1, 2018

## Report of the RSC Liaison to ISSN International Centre for 2017-2018

Close liaison with the ISSN International Centre and ISSN Network was maintained through membership of the RSC Aggregates Working Group and Serials Task Force.

The RSC and ISSN International Centre developed a joint discussion paper on “Issues on IFLA-LRM alignment for serials and other continuing resources”, published as RSC/Chair/20 at <http://www.rda-rsc.org/sites/all/files/RSC-Chair-20.pdf>

Gordon Dunsire and Clément Oury (Data, Network and Standards Department, ISSN International Centre) gave a presentation on “A model to link them all: IFLA-LRM as a driver for harmonization of cataloguing standards related to serials and other continuing resources” to the IFLA Committee on Standards session during WLIC 2018 in Kuala Lumpur, Malaysia. The presentation is available at [http://www.gordondunsire.com/pubs/pres/IFLA\\_LRM&Serials\\_ISSN\\_DunsireOury.ppt](http://www.gordondunsire.com/pubs/pres/IFLA_LRM&Serials_ISSN_DunsireOury.ppt)

The formal paper was co-authored with members of the RSC Serials Task Force, and is available at <http://library.ifla.org/2235/1/074-dunsire-en.pdf>

Gordon Dunsire  
RSC Liaison to ISSN International Centre  
October 1, 2018

## Report of the RSC Liaison to Library of Congress NDMSO for 2017-2018

There was no formal communication with the Library of Congress Network Development and MARC Standards Office (NDMSO) during the reporting period.

Gordon Dunsire participated with James Hennelly and Thurstan Young (British Library and MARC Advisory Committee) in a “pop-up” meeting on RDA and MARC 21 during the 2018 ALA Annual conference in New Orleans, USA. The consolidated presentation is available on slideshare at <https://www.slideshare.net/GordonDunsire/m21-and-rda>

An options report by Thurstan Young on RDA in MARC 21 was submitted to the RDA Board’s meeting in September 2018. The report recommends reviving the RDA/MARC Working Group.

The 3R Core Team worked with Thurstan Young and William Leonard on developing the infrastructure for maintaining mappings between RDA and MARC 21 and displaying them in the new RDA Toolkit.

Gordon Dunsire  
RSC Liaison to Library of Congress NDMSO  
October 1, 2018