PCC Report for CC:DA at ALA Annual, Chicago, June 2017

Submitted by Lori Robare, PCC liaison to CC:DA

The following is a list of reports and activities that have been carried out by the PCC since ALA Midwinter in Atlanta in January 2017.

More information is available from the PCC web page: www.loc.gov/aba/pcc/

- The PCC has agreed in principle to pursue umbrella membership in ISNI and is undertaking a pilot project with ISNI for a small group of libraries to begin working within the ISNI database, utilizing ISNI tools to create, update, and manage ISNI identifiers.
- The PCC is moving forward to implement the recommendations of the PCC ISBD and MARC Task Group, which call for eliminating ISBD punctuation that coincides with MARC coding. As a first step, OCLC and LC are creating test sets of records and a small group is being formed to track the testing and analyze results. Communication with system vendors is another important step.

Standing Committee on Standards (SCS) Co-chairs: Chew Chiat Naun and Ed Jones

- Revisions to the BIBCO and CONSER Standard Record RDA Metadata Application Profiles were posted in April 2017.
- MAC discussion papers on the repeatability of $d and $s are being considered at this conference.
- Work will resume on implementing a new approach to authorized access points (AAPs) for translations once the process for posting PS changes during 3R is clarified. In summary, existing expression authority records qualified only by subfield $l will be regarded as undifferentiated. Catalogers may continue to create authority records for specific expressions but will no longer create undifferentiated authorities. A work authority will be required in all cases to support the AAP in the bibliographic record, and a language qualifier added to a work AAP in a bib record will not require a separate authority record. Some outstanding issues are still being resolved before implementation.
- The SCS/LDAC Task Group on the Work Entity is drafting a white paper to give a high-level outline of the issues surrounding the identification of work entities. Task Group chair Ed Jones presented issues for PCC consideration at the Operations Committee meeting in May and has initiated discussions on PCCLIST.
- The Task Group on Supplements and Special Numbers has drafted a revision to LC-PCC PS 2.12, (which instructs to treat a supplement or a special number to a serial as a series, while other policy statements prescribe either series treatment or other methods) and is gathering examples.
- Approved several changes to LC-PCC PSs that were included in the February and April releases of the RDA Toolkit. Some highlights:
  - 2.4.1.4 Recording Statement of Responsibility, Optional Omission: LC/PCC practice is generally not to abridge a statement of responsibility, but if abridging, the revised PS instructs not to omit words or phrases that are part of the name (like "Jr.") or that provide important identifying elements often used in an authorized access point.

- o 9.19.1.1 Constructing Authorized Access Points to Represent Persons: the section on Changing Authorized Access Points was revised to more clearly spell out the conditions under which an authorized access point in an existing authority record coded "rda" may be revised.
- Other work in progress:
  - o Discussing the likely impact of IFLA LRM and the 3R project and possible approaches to re-working Policy Statements and DCM Z1. Discussing interim procedures for policy documentation during 3R.
  - o Continuing to review relationship designator proposals, although none can currently be forwarded to the RSC due to the moratorium.
  - o Continuing work to provide guidance on recording distinguishing characteristics of expression.
  - o Reviewing guidelines for Provider-neutral e-resources and provider-neutral vendors.
  - o Updating the Cataloging FAQs available at: http://www.loc.gov/aba/pcc/naco/faq.html.

Standing Committee on Training (SCT) Co-chairs: Robert Maxwell and George Prager

Series Policy Task Group

- This group has finished its review of series-related LC-PCC PS and sections of DCM Z1. The group submitted a successful revision proposal of the DCM Z1 manual on what should be done when SAR information is needed on a work/expression record that already has been established as a NAR. The group proposed that a pre-existing NAR should be coded as a series authority record so that it can validate the authorized access point whether it appears in the 1XX/240, 7XX, or 8XX. This policy change is now reflected in the DCM Z1 1XX section. Additional proposals still under review include LC-PCC PS 1.8.2, 2.12.9, and 24.6.1.3 (Explicit instructions to add parentheses in chronological designation of series AAPs, additional examples of recording numbering in series AAPs) and sections of LC-PCC PS 6.27 and 24.6 relating to One or several series authorized access point: language editions.

RDA Series Training Manual

- All the modules of the RDA Series manual have been revised and are available on the Catalogers' Learning Workshop (CLW) web site at http://www.loc.gov/catworkshop/courses/naco-full%20series-RDA/course%20table.html. SCT will continue to update the manual as needed. Bob Maxwell has developed PowerPoint slides to be used for series training. The slides constitute Module 6a of the NACO training. They also complement and reference the more detailed series modules. The slides have been posted with the other modules of the NACO training at: https://www.loc.gov/catworkshop/courses/naco-RDA/index.html.

Relationship Designators in Authority Records

- Final editing of the guidelines is near completion. Some unresolved issues will be listed in an appendix of the guidelines, along with dates of expected resolution. The major remaining issues concern Guideline 2a: Pre-approval of new relationship designators; Guideline 2b: Guidelines from non-RDA vocabularies; Guideline 12, Practice 2: Using relationship designators from

Appendices I & K lines to relate jurisdictional corporate bodies (Practice 1, using $w codes "a" and "b" has been approved); Guideline 16: Using relationship designators from Appendix M to express subject relationships.

Report on Available Linked Data Training Resources

- SCT submitted its Report on Available Linked Data Training Resources in September 2015 and updated it in April 2016. To avoid duplicating work while keeping it up to date in the future, SCT is collaborating with the Linked Data for Professional Education (LD4PE) project through its portal, the Linked Data Exploratorium; the plan is to rely as much as possible on the resources and competency index available from LD4PE. In April 2017, SCT compared the latest version of its report to the content that was indexed in the Exploratorium. The list of missing training resources in-scope for the portal was submitted for addition to the index. Most of the resources on the list were added to the index by LD4PE in late May 2017. Linked data resources deemed useful to librarians but out of scope for the Portal are being incorporated into SCT's ViewShare site. Once the ViewShare site is completed, SCT's *Report on Available Linked Data Training Resources* will be archived on the PCC web site. SCT has also started to take advantage of two of the portal's features: the ability to offer a curated set of training resources that are particularly important for catalogers, and the creation of one or more learning map(s) for catalogers to follow. SCT also plans to collaborate with other partners in the near future in experimentation with linked data standards and applications.

RDA Special Formats Training

- SCT conducted an environmental scan of freely available RDA special formats training materials. This list is available as an Excel spreadsheet on the CLW web site at: http://www.loc.gov/catworkshop/RDA%20training%20materials/Special-Formats-Training-Scan.xlsx.

NACO Funnel Documentation Review

- A group was charged with identifying revisions needed to NACO Funnel web pages and documentation. The group's initial reports identified inconsistencies and gaps in information relating to funnels, and these are currently being resolved.

Aggregate Works

- Bob Maxwell is working on a white paper to identify outstanding issues related to aggregate works. Once his paper has been completed, a joint SCS-SCT task group will be formed to resolve any remaining issues, and to develop guidelines or best practices. Timeframe: summer-fall 2017.

SCT Periodic Review
- The PCC Standing Committees are reviewed by the Policy Committee on a rotation; SCT will be next. Major topics of the review will be: Are there changes that would make the committee serve the members more effectively or work more easily? Areas to consider in the review are: name, charge, membership, current and future activities, related organizations, and any

recommendation in PCC governance relating to Standing Committees. SCT will be considering all these issues, and presenting a report to PoCo by November 2017.

Succession Planning

- SCT's two co-chairs and at least one other member have already served two terms on the committee, so there will be at least three vacancies in SCT beginning in October 2017. The PCC Policy Committee (PoCo) will appoint new chair/s, and the new chairs, in conjunction with PoCo, will appoint other new members to fill the remaining vacancies.

Standing Committee on Applications (SCA) Chair: Ben Abrahamse

- SCA's name was changed (previously Standing Committee on Automation) and its charge was revised to reflect the current environment.

- Current focus is on coming up with technological solutions to assist in removing embedded ISBD punctuation from MARC records.

- Exploring the possibility of setting up a PCC linked data test environment or sandbox.