To: ALCTS Board of Directors

ALCTS/CaMMS Committee on Cataloging: Description and Access

From: Dominique Bourassa and Stephen Hearn, ALA Representatives to the North American RDA Committee (NARDAC)

Subject: Report on NARDAC and RDA-Related Activities, June-December 2019

NARDAC

The North American RDA Committee (NARDAC), the entity that represents the North American region on the RDA Steering Committee (RSC), has completed its second year of existence.

For most of 2019, the membership of the committee consisted of:

ALA Representatives:

- Dominique Bourassa, Yale University, NARDAC Chair
- Stephen Hearn, University of Minnesota

Library of Congress (LC) Representatives:

- Damian Iseminger, NARDAC Coordinator of Web Content
- Kate James, Back-Up Representative to the RSC

Canadian Committee on Cataloguing (CCC) Representatives:

- Thomas Brenndorfer, Guelph Public Library, NARDAC Representative to the RSC
- Nathalie Mainville, Library and Archives Canada

In October, Melanie Polutta replaced Kate as LC representative to NARDAC, and in November, Stephen became the new Back-Up Representative to the RSC. Thomas's first term as NARDAC Representative to the RSC ended on December 31. NARDAC members, recognizing Thomas's exemplary work, unanimously reappointed him as representative to the RSC. He will serve his second and final term from January 1, 2020 until December 31, 2021.

NARDAC met virtually via GoToMeeting five times since ALA Annual: July 8, September 9, October 7, November 18, and December 16. In between meetings, we conducted our work using Basecamp and Google Drive.

As expected, NARDAC members have participated in the development of the beta RDA Toolkit and have fulfilled RSC requests. We have involved members of our communities when appropriate or advisable. For instance, we have contacted local experts to ask for advice on some topics under discussion by the RSC, and have nominated others for the RSC Technical and Application Profiles Working Groups.

Last summer, the RSC charged NARDAC to review the suitability of the RDA unconstrained elements to develop a set of user-friendly element labels that could be used for public display. NARDAC enlisted the

help of the CC:DA 3R Task Force chaired by Bob Maxwell to review the entire set of RDA unconstrained elements and definitions. Following this work, NARDAC prepared a report raising issues and identifying errors. Our report was presented and discussed at the RSC meeting held last October in Santiago. The RSC asked NARDAC for further work on this project before a decision is made.

For the first time since the beginning of the 3R Project in 2017, the RSC allowed for broad community review of RDA discussion and proposal papers. NARDAC members solicited feedback from CCC, CC:DA and LC on the following papers:

- Expression Excerpts
- RDA Content Elements
- RSC Operations Documents
- String encoding schemes in RDA Toolkit

The comments we received informed our responses to the RSC. During this process, NARDAC members have considered how our constituent groups can be informed of each other's feedback to papers and proposals, and if and how NARDAC responses to the RSC can be shared with them. Above all, the process revealed that community feedback is challenging when turnaround time is short or occurs over a holiday. As the RSC moves to quarterly meetings (instead of annual), it will be essential for the ALA representatives to NARDAC to work with CC:DA to figure out how feedback on proposals and discussion papers can be handled efficiently, considering the amount of time that CC:DA parliamentary procedures require.

In July, Stephen and Dominique worked with the Cataloging Advisory Committee of the Art Libraries Society of North America (ARLIS/NA), chaired by Andrea Puccio, and the CC:DA 3R Task Force to develop a proposal to add an RDA element for curators who play a role at the work level. On July 24, the proposal was presented to CC:DA, and, on August 6, CC:DA authorized the ALA Representatives to send the proposal to NARDAC with revisions stemming from discussion. Although it was a strong proposal, NARDAC decided not to move the proposal forward to the RSC due to several issues. However, the insight we gained from this experiment will help us in better defining how future North American RDA proposals will be handled. We plan to continue to work on the proposal following advice we received from the RSC.

Since last June, NARDAC members have kept the North American communities informed of RDA developments by participating in outreach events:

- Dominique, Damian, Kate, and Thomas were table leaders at the RDA pre-conference workshop held June 21 in Washington, DC. Dominique worked with participants on static single works; Damian, on music aggregates; Kate, on agent appellation elements; and Thomas, on work, expression, and manifestation appellation elements.
- Stephen presented "NARDAC updates" and Thomas "RDA Hot Topics," at the RDA Forum held June 22, 2019, during the ALA Annual conference (accessible http://www.rda-rsc.org/sites/all/files/NARDAC_Update_Hearn.pdf) and http://www.rda-rsc.org/sites/all/files/RDA%20Forum%20-%20RDA%20Hot%20Topics.pdf).

- Stephen participated in the meeting of the PCC Standing Committee on Standards on June 23 to discuss with members the development of RDA and its impact on the creation and revision of LC-PCC statements.
- On July 16, 2019, Damian and Kate presented "Anticipating the New RDA," as part of the lecture series Digital Future and You, held at the Library of Congress, Washington, DC. (available at https://www.loc.gov/item/webcast-8932/).
- Dominique presented "RDA: From Development Towards Implementation," during the Connecticut Library Association 2019 Technical Services Section Fall Meeting, held at the Wallingford Public Library, on 24 October 2019.

NARDAC members have been involved in the development of local policies:

- Stephen co-chaired the LC-PCC Task Group on Data Provenance in Beta RDA Toolkit.
- Melanie co-chaired, and Dominique was a consultant on, the LC-PCC Task Group on Element Labels in the Beta RDA Toolkit.
- Melanie has been heading the work on the LC-PCC policy statements with Damian and four other staff at LC.

NARDAC will hold its first meeting of 2020 on February 3. One of our goals is to develop effective interaction with the communities we represent. This will be imperative as the new RDA Toolkit replaces the original Toolkit and new operational procedures are implemented. We recognize that the development of application profiles and policy statements demands a great deal of effort from our communities. NARDAC is committed to become a support and information hub. Outreach will continue to be an important goal for all NARDAC members, and support and direction will be provided to constituent groups that take on training responsibilities.

RDA activities

The following report summarizes the activities of the RDA Steering Committee (RSC) from July-December 2019, primarily focusing on the RSC's October 2019 meeting in Santiago, Chile.

RSC membership and governance changes

- Kate James completed her term as RDA Examples Editor at the end of December 2019. Honor Moody (Harvard University) has become the new RDA Examples Editor, beginning her two-year term in January 2020.
- On December 31, Beacher Wiggins completed his term on the RDA Board as the National Institution representative from North America and ex-officio member of NARDAC. Merideth Fletcher, from LAC, was chosen to replace him. Her three-year term started on January 1.
- RSC has formed one new task and finish working group, the Application Profiles Working Group; it has also refreshed the membership and tasks for the standing working groups: Technical Working Group and Translations Working Group. Damian has been named to the Technical Working Group.

- The RSC meeting in Santiago, Chile in October 2019 was intended to support the formation of a regional organization for South America.

RSC 3R Project and RDA development highlights

While the 3R Project continues with the translation of the stabilized text of RDA and the development of policy statements by communities using RDA, changes to RDA are limited to error corrections and editorial revisions with minimal impact on the translation work. Some work on further RDA development has begun, but will not see implementation until the 3R Project is complete. The date for the Switchover of the Beta RDA Site to official RDA status is now set at December 15, 2020. The start of the year-long countdown to closing the original RDA Toolkit will come sometime later by agreement between RSC and the RDA Board.

At the Santiago meeting in October, RSC focused on a number of areas:

Internationalization and the removal of Anglo-American and Christian focus is an area of concern. RSC expressed its desire to shift any instructions specific to one community out of the main body of RDA. For example, instructions on formulating authorized access points could be shifted into a new section devoted to string encoding schemes. It is hoped that such a shift will make culturally appropriate standardization of string encoding schemes by different cataloging communities more flexible within the larger RDA community. RSC expects that the internationalization effort will entail the formation a Working Group.

RSC discussed the need for more logical assignment of RDA content to designated content areas such as the Guidance and Resources tabs. Because RSC envisions content being relocated rather than significantly revised or removed, this work may proceed concurrently with the work on translating RDA without causing major disruptions of that work.

RSC considered the idea of creating a new Collective Agent entity for meetings, conferences, congresses, expeditions, festivals, fairs, etc. The new entity would be defined not to overlap with the Family or Corporate Body entities.

RSC reviewed a briefing paper about Work boundaries, the factors indicating that a new Work entity has been created. After further development, this could become a part of the Guidance section of RDA.

RSC reviewed a briefing paper on "RDA metadata implementation scenarios" which suggests updating and expanding the set of scenarios for implementing RDA using different approaches to metadata structure and encoding, including linked open data. The new scenario content is expected to appear in the January release of RDA.

Additional briefing papers on Expression excerpts and Content elements related to aggregated expressions were presented. Discussion of these papers has continued following the Santiago meeting, and NARDAC has provided comments on them.

RSC reviewed the report from NARDAC on element labels for unconstrained RDA elements. A response to NARDAC received in December from Technical Working Group chair Gordon Dunsire has clarified a number of points which limit options for some kinds of changes to labels. The work on labels is ongoing.

Procedural developments

In September RSC began using asynchronous online meetings to increase its capacity between in-person meetings of RSC.

The guidelines for proposing changes to RDA which RSC Chair Kathy Glennan presented at CC:DA in June have continued toward a formalized process. Draft Operations Documents were reviewed at the Santiago RSC meeting. NARDAC provided a response in support of the draft documents. RSC is working toward a quarterly rather than annual proposal and review cycle, which will mean changes in the opportunities and processes for gathering and recording community responses.

The Curator element proposal initiated by ARLIS/NA was taken up as a pilot to test the process for making post-3R Project proposals to RSC. The proposal has not yet been submitted to RSC, but there has been useful discussion with RSC about the form this proposal and others to follow should take.

Outreach

ALA Publishing offered a series of Orientation webinars over the summer of 2019 reviewing aspects of the Beta RDA. Thomas presented the Relationships topic in the webinar series. ALA Publishing plans to repeat the series in the first quarter of 2020.

RSC has organized two identical half-day pre-conferences at ALA Midwinter 2020 aimed at demystifying RDA for interested catalogers.

Next RSC meeting

RSC held its first quarterly asynchronous meeting of 2020 on January 6-9. Two more asynchronous meetings and one in-person meeting in Jerusalem in October are planned for the year.