**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, January-June 2020

### NARDAC

The North American RDA Committee (NARDAC), the entity that represents the North American region
on the RDA Steering Committee (RSC), is at the midpoint of its third year of existence. NARDAC's
membership for the first half of 2020 has consisted of:

- ALA Representatives:
  - Dominique Bourassa, Yale University, NARDAC Chair
  - Stephen Hearn, University of Minnesota, Back-Up Representative to the RSC
- Library of Congress (LC) Representatives:
  - Damian Iseminger, NARDAC Coordinator of Web Content
  - Melanie Polutta, LC Representative to NARDAC
- Canadian Committee on Cataloguing (CCC) Representatives:
  - Thomas Brenndorfer, Guelph Public Library, NARDAC Representative to the RSC
  - Nathalie Mainville, Library and Archives Canada

In June, Thi Bao Tran Phan (LAC) replaced Nathalie as CCC Representative to NARDAC.

NARDAC met virtually via GoToMeeting five times since ALA Annual: February 10, March 9, April 20, May
19, and June 22. There was also a special NARDAC meeting on April 23 focused on the user-friendly
element labels project. In between meetings, we conducted our work using Basecamp and Google Drive.

NARDAC also organized and facilitated a virtual meeting on May 28 for a discussion between PCC and
RSC members regarding RDA conformance and how conformance to RDA relates to the use of
constrained RDA elements and the corresponding unconstrained elements in the RDA registry. Melanie
solicited questions from PCC's Policy Committee before the meeting, and Stephen facilitated the
discussion. A compilation of answers from RSC to PCC's questions was distributed after the meeting.

ALA's NARDAC representatives Dominique and Stephen and RSC Chair Kathy Glennan reported to the
ALCTS Committee on Cataloging: Description and Access (CC:DA) at Midwinter on NARDAC's activities
and RSC quarterly meeting schedule for considering proposals. CC:DA is in the process of revising its
procedure document to enable better integration with RSC's quarterly meeting schedule and to address
the need to do more work virtually in the future. The Canadian Committee on Cataloguing is having
similar discussions.

**Committee Work**

NARDAC continued its work to develop a set of user-friendly display labels for RDA elements. Draft lists of labels based on the unconstrained elements in the RDA Registry have been sent to RSC, comments have come back, and NARDAC has done further work on the labels list for re-submission to RSC.

NARDAC continues to work on the exhibition curator proposal. Dominique revised the proposal with help from ARLIS/NA members. It is planned to be presented at the next CC:DA meeting and pending approval there, to the RSC meeting in October.

Damian and Melanie are participating in RSC's project to move instructions related to string encoding schemes (SESs) out of RDA and into community spaces associated with RDA.

Thomas has continued to work for RSC on issues around pseudo elements, elements applicable only to a category of RDA entities, e.g., only to musical works. Thomas observed that moving SESs out of the text of RDA will resolve a number of pseudo element issues.

NARDAC discussed a question from the LC-PCC Task Group on Diachronic Works in the RDA Beta Toolkit about representing series and subseries relationships with new elements from RDA Beta Toolkit. The task group questioned the lack of a place for ISSN in the Beta Toolkit's series statement super-element. Thomas noted that the content details of this element may become part of a community SES.

NARDAC invited a fast track proposal from the LC-PCC Task Group on Diachronic Works in the RDA Beta Toolkit to address the task group's concerns about the wording of the "Manifestation: note on issue, part, or iteration used as basis for identification" element. The fast track proposal is under review in NARDAC and should be submitted to the RSC soon.

NARDAC's Terms of Reference document was reviewed in light of the decision to merge ALA divisions ALCTS, LITA, and LLAMA to form the new Core division. No revision of the NARDAC document is needed at this time.

**Outreach Activities and Presentations**

- Dominique, Melanie, Stephen, and Thomas participated in the RDA Toolkit Pre-Conference Workshop held January 24, 2020, at the ALA Midwinter Conference, Philadelphia (presentations listed on page 6).

- Stephen chaired the RDA Forum held January 25, 2020, at the ALA Midwinter Conference, Philadelphia, PA. Dominique presented "News from NARDAC: The North American Region Fledges Its Wings" (http://www.rda-rsc.org/sites/all/files/Bourassa-RDA-Forum-2020-01-25.pdf), and Thomas, "RSC Hot Topics" http://www.rda-rsc.org/sites/all/files/Brenndorfer%20RSC%20Hot%20Topics%202020-01-25.pdf

- Thomas presented the webinar "Relationship Elements" at the RDA Online Orientation New Concepts series, March 11, 2020.

- Dominique presented "A Head Start to the Beta RDA Toolkit" at the 2020 New England Technical Services Librarians Association (NETSL) Annual Spring Conference: Under Pressure: Coping with New Realities in Technical Services, held online (17 Apr. 2020).

- Dominique prepared "This Is Not a Pipe, or, Drafting a Set of Display Labels for RDA Elements" for the 2020 PCC Operations Committee Meeting (8 May 2020) http://www.loc.gov/aba/pcc/documents/OpCo-2020/Bourassa-RDA-Display-Labels-OpCo-2020.pdf

- Melanie presented with Paul Frank on the LC/PCC policy statement conversion project "LC-PCC Policy Statements Development" for the 2020 PCC Operations Committee (8 May 2020).

**Development of policy statements**

- Melanie co-chaired with Ryan Finnerty, and Dominique was a consultant on, the LC-PCC Task Group on Element Labels in the RDA Beta Toolkit, an advisory group to the LC-PCC group working to develop policy statements.

- Stephen co-chaired with Manon Théroux the LC-PCC Task Group on Data Provenance in the RDA Beta Toolkit.

- Melanie is participating in the Library of Congress and the Program for Cooperative Cataloging work on the policy decisions and detailed work of converting the current LC/PCC Policy Statements for the beta RDA Toolkit.

  o There are six phases to this project:

    1. policy statement conversion,
    2. DITA markup,
    3. application profile,
    4. testing,
    5. metadata guidance documents
    6. training

  o The first three phases have started and are overlapping in time.

**Others**

- Library and Archives Canada (LAC) continues working on the mapping of RDA elements to MARC 21 for authorities and monitors how catalogers apply tools in order to develop application profiles.

- An employee of LAC visited Rwanda for a month in January to provide training on library practices, particularly on RDA.

**RDA activities**

The following report summarizes the activities of the RDA Steering Committee (RSC) from January to June 2020.

**RSC membership and governance changes**

- Honor Moody (Harvard University) began her two-year term as Examples Editor on January 1, 2020.

- Gordon Dunsire's term as Technical Team Liaison to the RSC and chair of the RSC's Technical Working Group will end on December 31. Damian Iseminger (LC) has been chosen to succeed him on January 1, 2021 for a two-year term. Until then, Damian will serve as Technical Team Liaison-Elect.

- Efforts continue to form the Africa, Asia, and Latin America and the Caribbean RDA regions. On December 10, 2019, RSC members participated in a videoconference sponsored by the Biblioteca Nacional de México to discuss the formation of the RDA Latinoamérica y el Caribe (ALyC) Group.

**RSC Action Plan 2020 to 2022**

- The RSC developed and adopted the [RSC Action Plan 2020-2022](), which is tied to the RDA Board [Strategic Plan for RDA 2020-2022]().

- Both plans define priorities for the development and implementation of RDA centered around three main goals: "Develop RDA as a responsive and dynamic standard," "Increase the adoption of RDA," and "Provide relevant governance."

**RSC meetings**

- The RSC held two asynchronous meetings since the beginning of the year: January 6 to 9 and April 6 to 9.

- At the January meeting, the RSC discussed operational plans, best practices for asynchronous meetings, and fast track changes. Members evaluated discussion papers on string encoding schemes, content elements, and implementation scenarios, and four fast-track change recommendations. Meeting minutes are available at: [http://www.rda-rsc.org/sites/all/files/Minutes%20Public%20January%202020%20meeting.pdf](http://www.rda-rsc.org/sites/all/files/Minutes%20Public%20January%202020%20meeting.pdf)

- At the April meeting, the RSC discussed an interim report on application profiles in beta RDA Toolkit drafted by the Application Profiles Working Group, and NARDAC's progress report on the use of unconstrained element labels to develop a set of display labels for RDA elements. In addition, the RSC considered a discussion paper on representative expression of aggregating works, and one on community vocabularies in RDA Toolkit. Meeting minutes are available at: [http://www.rda-rsc.org/sites/all/files/Minutes%20Public%20April%202020%20meeting.pdf](http://www.rda-rsc.org/sites/all/files/Minutes%20Public%20April%202020%20meeting.pdf)

- Prior to each meeting, NARDAC gathered feedback on all publicly posted discussion papers from our constituent groups. We prepared and presented to the RSC responses based on feedback we received.

- The next RSC asynchronous meeting will be held from July 6 to 9.

- The next in-person meeting is scheduled to be held from 12-16 October 2020 at the National Library of Israel, in Jerusalem. The RSC is monitoring the COVID-19 situation and will decide in summer if this meeting will be held face-to-face, or if it will be held asynchronously during that same week.

**3R Project Highlights**

- *Status of the 3R Project*

  The 3R Project is in its last phase. The switchover date remains December 15, 2020. A time frame for taking down the original Toolkit has not yet been established.

  The focus of the project for 2020 centers on stabilizing the RDA registry functionality and data, cleaning up the English text of RDA to correct typos and errors and to improve consistency, beginning the publication of policy statements and translations, implementing decisions on content elements and expression excerpts, and developing a sustainable method for presenting string encoding schemes.

- *Beta Toolkit News*

  On February 18, ALA Digital Reference welcomed Ramon Robinson as its new Marketing and Sales Manager.

  A major release affecting the content, features, and functionality of the beta RDA Toolkit was posted on April 29. The release implements the decisions taken by the RSC at the in-person meeting held in Santiago, Chile, in October 2019, and at the January asynchronous meeting.

  Highlights of the April release include the improvement of searching and filtering of element lists at the bottom of each entity page with the addition of three radio buttons ("all," "attributes," and "relationships"), the addition of a few sample British Library and LC/PCC policy statements to test display functionality, and the development of a new section labeled "Community vocabularies" in the "Resources" tab, where "Abbreviations," "Terms for gender," and other vocabularies have been relocated.

  A significant change to the beta RDA Toolkit involves the development of an area of the Toolkit to relocate instructions for string encoding schemes for the construction of access points. Instead of being presented in option boxes, these instructions will appear more appropriately in community-based policy statements. The phased approach to transition to this new model began with the April release of the Toolkit, where it has been applied to two elements as a test: "authorized access point for place" and "variant access point for place."

Other highlights of the April release include the addition of a new expression element "colour" and the improvement of the layout and wording of soft-deprecated and shortcut elements.

For a description of changes associated with this rollout, see https://www.rdatoolkit.org/April2020release and https://beta.rdatoolkit.org/Resource/Index?externalId=en-US_topic_p_bdh_rps_lkb

**Outreach**

- On January 24, the RSC held two half-day preconference workshops in Philadelphia, at ALA Midwinter. Four NARDAC members and five past and present RSC members helped participants engage with the beta RDA Toolkit through presentations and practical exercises. Presentations included:
  - o "RDA Toolkit Workshop: A Crash Course - Welcome and Background," by Kathy Glennan, RSC Chair;
  - o "RDA Beta Toolkit Basics," by Kate James, former LC Representative to NARDAC and former RDA Example Editor;
  - o "A Quickstart Guide to RDA Terminology: Elements, SES, and VES," by Dominique Bourassa;
  - o "Everything Old is New Again," by Thomas Brenndorfer;
  - o "Whatever Happened to... ?," by Melanie Polutta;
  - o New Concepts in the Beta Toolkit," by Honor Moody.

  Plans to present a similar workshop during ALA Annual were cancelled due to COVID-19 and the change to ALA Annual 2020 as a virtual event.

- The RSC chair presented, "Overview of the RSC Action Plan 2020-2022," and James Hennelly, director of ALA Digital Reference and RSC ex-officio member, presented "RDA Toolkit Update," at the RDA Forum, held January 25, at ALA midwinter.

- James presented on the process of publishing RDA elements in "Deliverance: A Journey Through the RDA Workflow", at the RDA Linked Data Forum held on January 27, during ALA Midwinter.

- During ALA Midwinter, several RSC members met with BIBFRAME advocates to discuss the relationship and interoperability of the standard with RDA.

- The New Concepts Webinar Series, presented last summer, was repeated in February and March. It included webinars on Representative Expressions and Manifestation Statements, Fictitious Persons and Non-Human Personages, Nomens and Appellations, Relationship Elements, and Timespan and Place.

- The RSC Chair discussed aggregates and string encoding schemes in "RSC Chair Report to EURIG" presented at the EURIG annual meeting, held May 19.

- The RSC chair presented "String Encoding Schemes: Community Choice in RDA," at the PCC Joint Operations Committee Meeting, held online May 21.

- Presentations are available on the RSC website (http://www.rda-rsc.org/node/634) and on the free RDA YouTube channel (https://www.youtube.com/c/RDAToolkitVideo). The YouTube channel also includes short videos prepared by Kate to introduce users to the beta RDA Toolkit and new RDA concepts.

- The RDA Lab Series will be presented from June 30 to December 8, through ALA eLearning. This webinar series, which will consist of six practical modules of four hour-long session taught by Kate, will explore new RDA concepts, in addition to new approaches to familiar topics. Modules include Relationships Basics, Nomens, Manifestations, Person, Works, and Aggregate Manifestations.