

**To:** ALA/ALCTS/CCS Committee on Cataloging: Description and Access  
**From:** Kathy Glennan, ALA Representative to the Joint Steering Committee  
**Subject:** Report on JSC Meeting, November 4-8, 2013, and on other JSC activities  
July-Dec. 2013

The following report on the November 4-8, 2013 meeting of the Joint Steering Committee for Development of RDA is based on my own notes, John Attig's blog entries for each day ([http://www.personal.psu.edu/jxa16/blogs/resource\\_description\\_and\\_access\\_ala\\_rep\\_notes](http://www.personal.psu.edu/jxa16/blogs/resource_description_and_access_ala_rep_notes)), and the JSC's "Outcomes of the 2013 JSC Meeting" (available on the JSC website at: <http://www.rda-jsc.org/2013JSCmeetingoutcomes.html>). Only documents originating from the JSC itself should be considered authoritative. These include the ".../Sec final" versions of the proposals and the minutes of the 2013 JSC meeting (which should be available within several months).

At the end of the report are (a) a brief summary of JSC actions on the ALA proposals, and (b) a list of follow-up actions for ALA.

The agenda for the meeting, as well as copies of the documents under discussion, are available on the JSC website at <http://www.rda-jsc.org/working1.html>

The Joint Steering Committee members present were:

Barbara Tillett, JSC Chair  
Judy Kuhagen, JSC Secretary  
Alan Danskin, British Library  
Gordon Dunsire, CILIP  
Christine Frodl, Deutsche Nationalbibliothek  
Kathy Glennan, American Library Association  
Bill Leonard, Canadian Committee on Cataloguing  
Kevin Marsh, Australian Committee on Cataloguing  
Dave Reser, Library of Congress

ALA Publishing, represented at the meeting by Troy Linker and James Hennelly, hosted the meeting at the American Library Association Washington Office. Eleven additional observers attended the public sessions of the meeting, and in some cases they led the JSC discussion of specific papers in their areas of expertise. I am indebted to John Attig for his support before, during, and after the JSC meeting.

At the close of the meeting, Barbara Tillett completed her 20 years of service on the JSC. She will be missed! Gordon Dunsire is the new Chair of the JSC, and a new CILIP representative will be appointed.

## Monday, November 4

The JSC spent the bulk of the day in executive session. Of interest to CC:DA:

- James Hennelly, Managing Editor of ALA Digital Reference, will be ALA Publishing's primary contact for the RDA Toolkit, replacing Troy Linker in that role.
- ALA Publishing plans on having four releases/updates to the Toolkit in 2014, with the approved proposals from the JSC meeting appearing in the April update.
  - The other RDA Toolkit releases are scheduled for February, August, and October.
  - The JSC will monitor the cost associated with updating RDA, which is related to the number of chapters touched. It is possible that minor changes to some chapters may be delayed as a result.
- Work is progressing on the creation of *Essential RDA*. This is envisioned as a companion to RDA with a foundation of RDA basic instructions and core elements.
- RDA-L will move from being hosted by Library and Archives Canada to ALA, using sympla. [Done, late December.]
- The JSC will create an updated strategic plan and accompanying work plan.
- The JSC will create a number of new working groups, focusing on specific issues. These include:
  - JSC RDA/ONIX Framework Working Group
  - JSC Technical Working Group
  - JSC Places Working Group
- To assist the cataloging community, future JSC proposals will include a brief abstract, which can be displayed on the JSC website and used in announcements.
- The next JSC meeting is tentatively scheduled for November 3-7, 2014, in Washington, DC. Deadlines for CC:DA (submission of proposals/discussion papers, as well as formal responses to proposals/papers from other JSC constituencies) will be similar to those set for 2013.

## Tuesday, November 5

### GENERAL

#### **6JSC/CCC/13: Revision of RDA 1.7.3 (Punctuation)**

This proposal suggested clarifications to the instructions on handling punctuation in transcribed elements, stating a general instruction to transcribe punctuation as it appears on the source, but specifying exceptions for punctuation separating different elements and for punctuation separating different instances of the same element. The proposal was approved with some additional examples, and wording for explaining the examples suggested by LC.

#### **6JSC/DNB/Discussion/1: Discussion paper: First issue v. latest (current) issue**

This discussion paper set forth the German practice for describing serials and integrating resources. In the case of minor changes, the description is based on the latest issue or

iteration (whereas the practice in the other countries represented by the JSC is to base the description on the earliest issue). The JSC had already agreed that “data created under RDA should be sufficiently flexible to support any approach, without compromising the capability to control and link descriptions of serial resources.” The DNB presented different ways of providing this flexibility in RDA.

The JSC agreed that the best approach would be to record earliest, latest, and intervening information in a single set of elements, with data-about-data (meta-metadata) that would identify the source for each instance of the elements. The DNB was advised to continue its current practices under a local application guideline. The incoming JSC Chair will organize an effort to include meta-metadata in the RDA data model. This is a critical and urgent need since is an implementation issue for any model; however, it will not be simple to resolve.

### **6JSC/Examples/Discussion/1: Contextual examples in RDA**

The JSC Examples Group (chaired by Kate James of LC) presented two discussion topics.

1. Creating an Examples Guide to assist in formulating and editing the contextual examples found in RDA. The JSC accepted this proposal.
2. Potentially revising existing examples to reflect the main instruction to include initial articles (changed in RDA in 2011 with the implementation of [6JSC/Chair/3](#)). Three options were presented. Option A: revise all the examples in RDA to include initial articles when appropriate. Option B: retain existing examples and introduce a few new English examples, explaining the practice in a revised RDA 0.10. Option C: retain existing examples, but add explanations when the initial article is omitted; consider adding a statement to RDA 0.10 about the disparate practices. The JSC asked the Examples Group to prepare revisions based on Option A; all new examples should follow this approach. Because of the widespread impact on the text, it was left open how and when these changes would be implemented.

## MANIFESTATIONS AND ITEMS: TRANSCRIPTION

### **6JSC/CCC/11: Revision of RDA 2.3.1.7 (Titles of parts, sections, and supplements) and RDA 2.3.2.6 (Collective title and titles of individual contents)**

This proposal sought to clarify two instructions that deal with common or collective titles vs. titles of parts, sections, etc.

- RDA 2.3.1.7: The JSC generally agreed with the approach taken by the ALA response to the CCC proposal; however, additional changes were suggested to avoid introducing the concept of dependent/independent titles. The CCC and ALA reps worked together to present a revised proposal by the end of the week; however, the JSC felt this revision needed additional work. An improved version of the proposal will be considered by the JSC in December/January.
- RDA 2.3.2.6: The JSC agreed with the proposal, with the addition of references to the guidelines for comprehensive and analytical descriptions in chapter 1. An additional issue relating to similar instructions at 6.27.2.2 was determined to be a separate issue that will be dealt with later.

**6JSC/ISSN/2/JSC response/ISSN response: Response to JSC response of ISSN discussion paper /2**

The ISSN response indicated their intention to submit a proposal to deal with the “first five words” in the provisions for title changes in the case of languages (such as Japanese) that do not divide text into words. The JSC Chair will respond that we are awaiting this proposal with gratitude to ISSN for developing it.

**6JSC/DNB/3: Attributes of manifestations: Instructions for more than one instance of an element**

The DNB sought to clarify the RDA instructions when there are multiple instances of an element, and the cataloger chooses to go beyond the core requirement to record the first instance: Does RDA require recording all additional instances, or does it allow the selective recording of additional instances? The JSC agreed on the latter interpretation and will add the following statement to RDA 0.6.1: “Only one instance of a core element is required. Subsequent instances are optional.” The JSC did not agree to the proposal to change specific instructions from “if there is more than one statement...” to “if more than one statement is recorded”; two instances that already use the latter wording (2.3.4.3 and 2.5.2.3) will be revised.

**6JSC/LC/24: Revisions to instructions for production, publication, distribution, and manufacture statements (2.7, 2.8, 2.9, 2.10)**

This complex proposal attempted to resolve a number of issues in these elements:

- One of these issues dealt with the concept of “grammatically separable” information included in an element; these proposals were withdrawn by LC.
- The JSC agreed to move the optional omission of levels of corporate hierarchy from the general instructions for the aggregate statement to the specific instructions for the producer, publisher, distributor, manufacturer element.
- The JSC agreed to add references to the chapter 21 instructions for recording relationships to the producer, publisher, distributor, manufacturer elements (using wording suggested by CCC).
- The JSC agreed to add a missing general instruction to 2.8.1.4 (but without the proposed “e.g.” statement).
- The JSC agreed to remove the conditional clause from 2.10.1.4 that would allow a manufacturer statement to be recorded only if there were no publication or distribution information available.
- The JSC agreed to add a guideline in each chapter that the name may be “represented by a characterizing word or phrase.”
- The JSC agreed to defer action on further proposals relating to the statement of function (2.7.4.4, etc.); the British Library will prepare a discussion paper on how to deal with statements of function that are associated with the name of the producer, etc.

**6JSC/LC/25: Recording dates in more than one calendar (RDA 2.6.7.1, 2.6.9.1, 2.7.6.3, 2.8.6.3, 2.9.6.3, 2.10.6.3)**

The JSC approved this proposal to allow the recording of dates in more than one calendar, using wording provided by ALA. The inclusion of an optional omission (to record the date only in the calendar preferred by the agency creating the data) was withdrawn. The JSC further agreed to a proposal from ACOC (via Fast Track) to include similar provisions for copyright dates in 2.11.1.3.

**6JSC/ACOC/9: Qualifications after an identifier: amendments to RDA 2.15.1.7**

The JSC approved the proposal to add examples and explanations of examples clarifying that the use of abbreviations in qualifications of identifiers would be based on how the information appeared in the resource. Wording refinements from BL, CCC, and LC were accepted.

**6JSC/ALA rep/6: Note on Manifestation and Item**

The JSC agreed to the following structure for notes on manifestation and item in chapters 2 and 3:

2.17 Note on Manifestation [subsequent instructions renumbered]

2.21 Note on Item

3.21 Note on Carrier

3.22 Note on Item-Specific Carrier Characteristics [currently 3.21]

A definition will be drafted for 2.17, 2.21, and 3.21; the definition of the new 3.22 will be revised for consistency with the other definitions.

**MANIFESTATIONS AND ITEMS: CARRIERS****6JSC/ALA/Discussion/1: Machine-Actionable Data Elements in RDA: Discussion Paper (2013)**

This discussion paper was a follow-up from a similar paper considered by the JSC in 2012 and contained four recommendations:

1. Add an element for Extent of expression. The JSC supported this recommendation, although there's some uncertainty about exactly what would be proposed. ALA was encouraged to bring forward a proposal in 2014.
2. Add an element for Extent of item. After some discussion, the JSC agreed that there was no need for a separate Extent of item element. Instead, RDA should offer the ability to provide annotations indicating differences from the extent of the manifestation (e.g., an indication of imperfections in, or additions to, the copy being described).
3. Extend the RDA/ONIX Framework to flesh out further sets of categories for content and carriers. There was general agreement, and the JSC is in the process of forming a working group to address maintenance and development of the Framework.

4. Modify the Aspect-Unit-Quantity model. The JSC responses were supportive of the work on this model done during the past year and encouraged the ALA Task Force to complete its work on the model and present revision proposals.

**6JSC/CCC/14: Revision of RDA 3.5.3 (Dimensions of still images)**

This proposal was withdrawn; the proposal and responses were referred to the ALA Task Force on Machine-Actionable Data Elements, to be folded into their work.

**6JSC/ALA rep/1/rev: Revision to *Categorization of Content and Carrier***

This proposal contained a draft revision of an outdated document that related the RDA Carrier Type, Media Type, and Content Type categories to the RDA/ONIX Framework; it also contained a list of issues relating to current RDA categories, and a list of further revisions to the RDA categories or the RDA/ONIX Framework (for future consideration). The JSC agreed to review the draft document and the issues relating to current RDA categories (by May 1, 2014), after which it is hoped that the revised specifications can be published on the JSC website.

## Wednesday, November 6

### WORKS AND EXPRESSIONS (OTHER THAN MUSIC)

**6JSC/LC rep/4: Treatment of Choreographic Works in RDA**

This discussion paper raised a number of issues relating to the treatment of choreographic works in RDA. The JSC responded to a number of questions and offered advice to the Library of Congress in preparing a revision proposal. The JSC generally agreed that a choreographic work should be treated as a work in RDA and that the choreographer is the creator. They also agreed that there should be instructions for devising preferred titles for untitled works in RDA chapter 6 (preferably a set of general instructions that would apply to all untitled works). They also expressed a preference for following general guidelines, rather than creating sections of specialized instructions for choreographic works.

The most significant discussion dealt with the nature of a choreographic work. There was agreement that there needed to be Content Type terms for both notated movement (which is already valid) and performed movement (which would need to be added). A performance of a choreographic work is seen as a complex sort of work that may bring together choreographic, music, costume design, etc. Such a performance creates a new work distinct from these distinct components. In this, performances of choreographic works are similar in some ways to the performance of an opera.

LC will develop a revision proposal based on this discussion.

**6JSC/EURIG/Discussion/2: Illustrative content and other augmentations**

This is the first of four discussion papers submitted by the European RDA Interest Group. The JSC Chair will be responding to these papers based on the JSC discussion.

This paper dealt with illustrative content and other augmentations of works based on the [Final Report of the \[FRBR\] Working Group on Aggregates](#). The JSC expressed the belief that (a) proposals based on the aggregates report are premature, as this report has not yet been incorporated into the FR model (part of a reconciliation effort expected to be completed in 2015); and that (b) RDA already allows flexibility in treating secondary content as a component of a compilation or as a contribution to an expression. It was noted that, when describing a manifestation, the cataloger may choose not to treat secondary content (such as illustrations) as independent expressions, and that this choice is an important part of the flexibility offered by RDA.

In a separate issue, the JSC noted that RDA does not permit characterizing an expression consisting entirely or chiefly of still images “all illustrations” or “chiefly illustrations” because illustrative content is by definition secondary content; primary content is described in the Nature of the work element. The Content Type “still image” can be used in such a case. Eventually it is expected that the addition to RDA of an element for Extent of Expression will provide better ways of describing the such resources; see the discussion paper submitted by the ALA Task Force on Machine-Actionable Data Elements ([6JSC/ALA/Discussion/1](#)).

### **6JSC/EURIG/Discussion/3: Compilations of works**

This paper suggested various ways to clarify the RDA instructions relating to compilations of works. In general, the JSC felt that much of what EURIG proposed is already possible following existing instructions. The JSC agreed that the instructions for compilations of works by multiple creators in 6.2.2.11 could be clarified, and LC agreed to draft a proposal for consideration in 2014. Another issue raised by EURIG, relating to compilers, was discussed in relation to 6JSC/ACOC/7 (see below).

### **6JSC/EURIG/Discussion/4: Representing dates of works and expressions in RDA**

This paper suggested an elaborate structure of data elements for describing various dates that might be used as the date of a work. The JSC generally felt that the proposed structure needed to be simplified. More importantly, the JSC wishes to explore the modeling of event-based data generally in RDA, as well as to develop strategies for incorporating data-about-data (meta-metadata) in RDA. These enhancements to the RDA model should allow for a better structure for recording dates of works and expressions in RDA. The JSC will be referring these issues to a technical working group.

### **6JSC/EURIG/Discussion/5: Representing language of expressions in RDA**

This paper suggested an enhanced structure for recording language of expression; among its features were (a) the ability to identify explicitly the language in which a work was originally expressed, (b) the identification of direct and indirect translations as such, and (c) explicit identification of languages of captions, dubbing, etc. The JSC again noted that this proposal presented modeling issues (particularly the meta-metadata issue). It was also observed that machine-actionability could be supported by structured notes (aggregates of elements

identified as such), although it was not clear whether such aggregated notes should be defined within RDA or in application profiles.

### **6JSC/ALA/23: Revision proposal for RDA instructions for treaties**

The proposal requested fundamental changes to the way catalogers construct authorized access points for multilateral treaties in RDA. Instead of creating a conventional title (the current practice), the proposal sought to base the authorized access point on a preferred title consisting of (in this order of preference): the official title, a short title or citation title, any other official designation. John Hostage was able to attend this portion of the JSC meeting and served as a subject expert during the discussion. Before considering the proposal in detail, the JSC decided two general issues raised by the Library of Congress:

- Because Signatory to a treaty is no longer used as part of the authorized access point, it will be eliminated as an element in RDA; instead, the relationship between the treaty and its signatories will be added to Chapter 19, with an appropriate relationship designator.
- Because the scope of the term “treaty” has been defined in RDA, the instructions will simply refer to “treaty” or “treaties” rather than “treaties or other agreements”.

Generally, the JSC agreed with ALA’s 27 specific recommendations, at times incorporating improved language suggested by LC. In December, ALA prepared a complete revised version of the proposal ([6JSC/ALA/23/rev](#)) to reflect the changes and agreements arising from the discussion.

### **6JSC/DNB/1: Parts of the Bible: Books (RDA 6.23.2.9.2)**

This proposal sought to replace the reliance on the Authorized Version of the Bible as the standard authority for naming books of the Bible with a general instruction to “choose as the preferred title a brief form of a well-established title in a language preferred by the agency creating the data.” Ultimately, the proposal was withdrawn; the JSC had considered moving 6.23.2.9.3 (the table listing groups of books) to the Tools tab as a reference for those who wish to continue using the Authorized Version, but this solution requires further consideration. DNB will create a policy statement for the short run and will collaborate with LC to create a proposal on this topic for 2014.

### **6JSC/LC/26: Changes to instructions on liturgical works (6.30.1.5)**

This proposal looked to clarify the instructions on authorized access points for liturgical works at 6.30.1.5. The JSC approved the version of this proposal in the ALA response.

### **6JSC/ALA/24: Variant title as access point (RDA 6.27.4.1, 6.28.4.1, 6.29.3.1, 6.30.5.1, 6.31.3.1)**

This proposal sought to add a provision for making a variant access point based on a variant title on its own (to parallel an existing instruction to make a variant access point based on the preferred title on its own). The JSC decided instead to remove the instruction to make a variant access point based on the preferred title on its own from 6.27, 6.29, 6.30, and 6.31 (such an instruction does not appear in 6.28). In the cases, of both preferred and variant title, RDA will rely on the general instruction to “Construct additional variant access points if considered important for access” and on some examples of access points based on preferred

and variant titles, with appropriate explanations. The Examples Group will evaluate the examples associated with those instructions slated for removal and determine if they need to be relocated or removed.

**6JSC/ALA/26: Colour content (RDA 7.17)**

This proposal was to merge the instructions for recording color content of various types of resources into a single set of instructions. After some discussion of the issues raised, the proposal was withdrawn. Instead, the CILIP representative will develop a proposal that models color as two distinct elements:

- (a) identification of monochrome vs. polychrome (and the identification of the actual colors)
- (b) the description of various production processes (such as tinting and toning) that can modify the color content of a resource.

Any future solution needs to take primary vs. secondary illustrative content into consideration.

WORKS: MUSIC

**6JSC/Music/1: Proposed revision to instruction on ... two or more parts**

This proposal was the result of a charge from the JSC to the RDA Music Joint Working Group to determine whether the instructions for recording the numbers of parts that had been revised in the case of musical works ([6JSC/CCC/7](#), 2012) could be applied more generally. After reviewing the proposal, the JSC decided that the instructions should not be generalized. However, the music-specific instructions relating to suites were approved. LC will prepare a proposal addressing the missing instruction for parts of parts in 2014.

**6JSC/Music/2: Proposed revision to instruction 6.14.2.5, Preferred title consisting solely of the name of one type of composition**

The proposal sought to clarify the instructions for recording a preferred title consisting solely of the name of one type of composition. The Working Group prepared a revised proposal ([6JSC/Music/2/rev/2](#)), primarily to clarify the choice of language of the title and the use of cognate forms. The revised proposal was accepted, with the addition of sub-instruction numbers and captions: 6.14.2.5.1, Choice of Language and 6.14.2.5.2, Singular or Plural Form; some wording changes; and the designation of the instruction for *étude*, *fantasia*, and *sinfonia concertante* as an exception.

**6JSC/Music/3: Proposed revisions for medium of performance (RDA 6.15.1, 6.28.1.9, 6.28.1.10, and Appendix E.1.1)**

This proposal suggested extensive revisions to 6.15.1 (the instructions for recording medium of performance as an element) and 6.28.1.9 (the instructions for using medium of performance in an authorized access point representing a musical work). The objective was to remove restrictions from the instructions on recording the element, but to move those restrictions to the instructions for constructing the access point. Thus complete descriptions of the medium may be recorded in the element, although that level of detail will not

necessarily appear in the access point. The JSC approved the proposal with modifications. The Working Group prepared a follow-up document reflecting the discussion: [6JSC/Music/3/follow-up](#).

## Thursday, November 7

### PERSONS, FAMILIES, AND CORPORATE BODIES

#### **6JSC/BL/13: Revision of RDA 9.6**

This proposal sought to adjust the core requirements for the element Other Designation Associated with the Person, as well as the instructions for including this element in authorized access points representing persons. The proposal was approved, with minor wording revisions. In addition, the JSC approved LC suggestions for revisions to the lists of core elements at 0.6.4 and 8.3; and to the instructions for constructing authorized access points at 9.19.1.1. LC prepared a follow-up document reflecting the changes: [6JSC/BL/13/LC follow-up](#).

#### **6JSC/LC/23: Language of the family (10.8)**

The JSC approved this proposal to add an element to chapter 10 for Language of the family, with a number of wording changes to bring the definition and instructions for this element into alignment with those for the element Language of the corporate body (11.8).

#### **6JSC/BL/11: Revision of RDA 11.4 and 11.13 and Glossary**

This proposal sought to extend RDA 11.4, Date Associated with the Corporate Body, by adding an element sub-type for Period of Activity of the Corporate Body. The JSC approved the proposal with some wording changes. It was agreed that some of the instructions for recording dates of persons (9.3.1.3) would be added to the general instruction at 11.4.1.3. Instructions are also to be added to 11.13.1.5 that would allow period of activity to be added to an authorized access point. Period of activity of the corporate body is to be a core element when needed to distinguish bodies with the same name, and therefore it was added to lists of core elements at 0.6.4 and 8.3.

#### **6JSC/BL/12: Revision of RDA 11.7 and 11.13**

This proposal looked to modify the instructions in 11.7, Other Designation Associated with the Corporate Body, specifically renaming the category “Names not conveying the idea of a corporate body” to “Type of corporate body”. The type of corporate body will be added to an authorized access point “if the preferred name for the body does not convey the idea of a corporate body”, but the type of corporate body element may be recorded whenever that information is deemed to be useful. The proposal was approved, with wording changes, and with changes to additional instructions (11.7.1.6, 11.13.1.1, and Appendix E.1.2.4).

**6JSC/BL/14/rev: Revision of RDA 11.13.1.8.2**

This proposal sought to clarify the instruction for constructing authorized access points for a series of conferences. The proposal was approved, with wording changes and with revisions to additional instructions (11.13.1.1 and 19.3.1.3).

## PLACES

**6JSC/BL/10: Revision ... to eliminate use of abbreviations for places**

The JSC decided not to act on the BL proposal at this time. There are a number of unresolved issues relating to place names, and the JSC agreed with the Library of Congress that these changes should all be made and implemented at the same time. The JSC decided to set up a JSC working group to consider issues related to places.

**6JSC/DNB/2: Larger place -- revision of 16.2.2.4, etc.**

The JSC decided not to act on the DNB proposal; the issues it raises about larger place will be referred to the new JSC working group on places.

The DNB also raised issues relating to the use of codes to represent places. The JSC accepted an LC proposal to revise RDA 0.12 to make it clear that other vocabulary encoding schemes (including codes) may be used as a substitute for the names or terms resulting from applying RDA instructions.

## SUBJECT RELATIONSHIPS

**6JSC/ALA/Discussion/2: Treatment of subjects in RDA****6JSC/Chair/8: Proposals for subject relationships**

The JSC considered this discussion paper, which presented one way of incorporating subject relationships into RDA in conjunction with 6JSC/Chair/8, which took a different approach. The JSC decided not to take specific action on either of these approaches at this time, preferring instead to wait for the outcome of the reconciliation of the FR models, undertaken by the FRBR Review Group, expected in 2015. As an interim measure, ALA was asked to consider developing a proposal for a high-level relationship element in chapter 23 for JSC consideration in 2014.

## OTHER RELATIONSHIPS

**6JSC/ACOC/7: Compilers and editors of compilations -- amendments to RDA 20.2.1**

The JSC approved this proposal to clarify the distinction between Compiler and Editor of compilation, using wording proposed by ALA.

In response to a comment from the British Library, the JSC agreed to combine the relationship designators Editor and Editor of compilation.

### **6JSC/ACOC/8: Addition of the copyright holder relationship -- amendments to RDA 21.6.1.1 and Appendix I**

The JSC decided that copyright information remains out of scope for RDA. ACOC withdrew the proposal.

### **6JSC/ALA/Discussion/3: Instructions for recording relationships**

This discussion paper consisted of a series of tentative recommendations for creating structured descriptions of relationships in Chapters 24-28, illustrated by a strawman proposal showing what such instructions might look like. Among other things, the responses and discussion made the following points:

- The concept of restricting structured descriptions to the attributes of the appropriate WEMI entity was rejected as being too restrictive. Instead, a future proposal should consider using structured descriptions of related works and expressions that are constructed using attributes of manifestations embodying the work or expression.
- The use of relationship designators in structured descriptions may be insufficiently flexible.
- A note can be machine-actionable if it is constructed from specified elements identified as such.
- There was an interest in taking a fresh approach to this problem, looking for examples to illustrate the concepts, rather than working with the existing examples.
- A future proposal needs to address: When we have a choice of techniques, why pick one over another?

The ALA task force will review all the responses and continue to develop revision proposals.

### **6JSC/ALA/25: RDA Appendix K revision and expansion**

This proposal looked to significantly expand the provisional Appendix K, which contains relationship designators for relationships between instances of the person, family, and corporate body entities. While the JSC did not approve the proposal in its current form, some decisions were made, including:

- Create a separate section for those relationship designators that apply to more than one FRBR Group 2 level, rather than repeating the relationship designator under each applicable category.
- Move suggested examples into the appropriate instructions in Chapters 29-32; do not include them in the appendix.
- Agree to include gender specific terms (such as aunt/uncle) rather than gender neutral terms.
- Include more than three levels of hierarchy if appropriate.
- Revise definitions to include the name of the larger category in entry for the subcategory.
- Do not propose relationship designators that are essentially the same as element names.
- Do not introduce one-to-many relationships.

- Reevaluate proposal with an eye toward merging terms that largely have the same definition.
- Look at relationships described in FRAD 5.3 and propose terms that address these relationships.

Needed relationship designators may be proposed through the fast track process while this proposal is reworked for consideration in 2014.

### **6JSC/CILIP rep/3: RDF representation of RDA relationship designators: a follow-up discussion paper**

The CILIP representative presented a mass of data resulting from his analysis of the RDA relationship designators. This data was originally extracted from the RDA Toolkit and then manipulated in a variety of ways. Some of this manipulation is designed to accomplish tasks such as transforming the property labels by adding verb forms and creating a consistent structure for property definitions. The expectation is that this data can be loaded directly into the Open Metadata Registry as a way of creating a version of the registry that is synchronized with the Toolkit. An RDA Technical Implementation Committee will be convened; among its tasks will be making recommendations on how to load the data into the Registry and how to set up a synchronization platform that can be used to make sure that the Registry and the Toolkit are consistent.

It was noted that Appendix 3 of the paper contains complete alphabetical lists of all the terms in RDA Appendices I, J, and K. These lists also present the full hierarchy of each term; for each there are views: bottom-up and top-down. This appendix is available on the JSC website at: <http://www.rda-jsc.org/docs/6JSC-CILIP-rep-3-Appendix-3.pdf>.

The JSC reviewed the recommendations in the paper and assigned actions for any that required further work (including a number of referrals to the RDA Technical Implementation Committee).

## **Friday, November 8**

### **ELEMENT SET, VOCABULARIES**

#### **6JSC/Chair/9: Element set discussion (“Notes on”, “Details of”, “Source Consulted”, etc.)**

The morning began with a discussion of this paper, with Deborah Fritz (who provided the background for the issues raised in the paper) joining the group electronically. In the process of creating data entry templates for RIMMF (RDA in Many Metadata Formats), Deborah identified what she believed were elements missing from the RDA element set.

Deborah noted that there seemed to be two categories of notes in RDA: (a) groups of elements and sub-elements in chapters 2 and 3 that are labeled “Notes on ...” and (b) instructions (mostly in chapters 3 and 7) that are labeled “Details of ...”. This distinction was explained by Tom Delsey in 2006 as those that made a comment about an element, and those

that were a different way of recording the same attribute (i.e., free-text as opposed to a controlled term). The JSC agreed that the “Details of ...” instructions were in fact elements. The question of whether the distinction described above is needed or whether the “Notes on ...” elements should be treated in the same way as the “Details of ...” elements is a data modeling question that will be referred to a JSC technical working group.

Deborah had also identified a group of “authority-type” elements, primarily in chapters 5 and 8, that seem to be generally related to any of the elements in the descriptions of persons, families, corporate bodies, works, and expressions – elements such as Source Consulted and Status of Identification. The JSC noted that these elements were data-about-data (meta-metadata); the JSC had already noted the need to provide a model for the inclusion of such meta-metadata in RDA descriptions, a task that will be referred to a JSC technical group.

### **Unresolved vocabulary issues**

The JSC has been attempting to provide definitions for terms in the RDA value vocabularies. The JSC secretary had prepared a document outlining the unresolved issues. The JSC looked at several of these issues.

- When the same term is used in more than one vocabulary, it will be necessary to make the labels in the Glossary unique, preferably by changing one or more of the labels or (if that fails) by adding a parenthetical qualifying term.
- In cases where RDA has multiple vocabularies for use with different types of resources (e.g., colour, colour of still image, colour of moving image, etc.), the JSC would like to merge those vocabularies into a single vocabulary. It was decided to do that in the case of Production method.
- The implementation of both these decisions will be informed by lists of how similar situations are treated in the translations of RDA.

## **FAST TRACK**

### **Unresolved Fast Track issues**

The JSC approved about ten Fast Track proposals for inclusion in the February 2014 release of the RDA Toolkit; these will be documented in an upcoming document in the Sec series.

## **OTHER APPENDICES**

### **6JSC/ISBD/Discussion/1 and 2/JSC response/ISBD response**

The ISBD Review Group submitted a draft revision of RDA Appendix D.1, along with some issues for discussion. The JSC agreed:

- to clarify the purpose of Appendix D.1.1 as stated in D.0
- to link to the ISBD-to-RDA mapping that will shortly be published, and to create an RDA-to-ISBD mapping
- to develop protocols for the joint maintenance of these mappings, in collaboration with the ISBD Review Group
- to replace the content of D.1.2 and D.1.3 with links to the consolidated ISBD, and

- to move the content of D.1 to the Tools tab in the RDA Toolkit, so that it would be available without a subscription.

The JSC will review and update Appendix D.1 based on the draft.

#### **6JSC/CCC/12: Revision of Appendix D regarding capitalization practice**

The proposal was withdrawn.

#### **6JSC/ALA/22: Revision of A.29, Capitalization of hyphenated compounds; changes in *Chicago Manual of Style*, 16th edition (2010)**

The proposal was to change the capitalization of hyphenated compounds in RDA, based on revisions in the latest edition of the *Chicago Manual of Style*. In addition to the proposal, ALA requested fast track changes affecting the RDA Editor's Guide and minor corrections to the text and examples in RDA. For the most part, the fast track changes were accepted and incorporated into the Nov. 2013 RDA Toolkit release. However, in relation to ALA/22 itself, the JSC had no consensus in favor of approval so it was withdrawn. An exception was for two specific changes: (a) changing the capitalization to "...Higher-Level..." in the heading for an example box in 11.2.3.7; and (b) changing the capitalization for the "Tonic Sol-Fa" entry in the Glossary.

#### **6JSC/ISBD/Discussion/3: ISBD Profile in RDA: Constructing functionally interoperable core records**

The ISBD Review Group submitted a draft profile comparing ISBD and RDA provisions and indicating how to construct RDA descriptions that are interoperable with ISBD. The Group asked for comments by November 30, 2013. Given the short timeframe, the JSC will make only a brief response. The main point to be made is that the document should clearly indicate what version of the RDA text was used, as it was clear that it did not include the revisions published in the July 2013 release.

### **Other JSC Activities, July-December 2013**

- Approved fast track changes affecting 193 RDA instructions, Glossary definitions, etc. for the November RDA Toolkit release.
- Revised the Statement of policy and procedures for JSC.
- Revised the RDA Editor's Guide.
- Welcomed Galen Jones as the new CILIP representative.

### **Summary of JSC Decisions on ALA Proposals**

**6JSC/ALA/22, Revision of A.29, Capitalization of Hyphenated Compounds; changes in *Chicago Manual of Style*, 16th edition (2010):** Withdrawn by ALA, but two heading-related changes accepted.

**6JSC/ALA/23, Revision proposal for RDA instructions for treaties:** Revision completed; JSC comments due January 13.

**6JSC/ALA/24, Variant title as access point (RDA 6.27.4.1, 6.28.4.1, 6.29.3.1, 6.30.5.1, 6.31.3.1):** Not accepted. The Examples Group will consider including proposed examples under appropriate instructions.

**6JSC/ALA/25, RDA Appendix K Revision and Expansion:** Not accepted; referred back to ALA to develop a revised proposal in 2014.

**6JSC/ALA/26, Colour Content (RDA 7.17):** Withdrawn by ALA. Gordon Dunsire to prepare proposal based on CILIP response for 2014 meeting.

**6JSC/ALA/Discussion/1, Machine-Actionable Data Elements in RDA: Discussion Paper (2013):** Encouraged revision proposals for creation of Extent of Expression element and development of Aspect-Unit-Quantity model. The JSC did not accept the recommendation to create an “Extent of Item” element and will refer issues relating to extending the RDA/ONIX Framework to a new JSC working group.

**6JSC/ALA/Discussion/2, Treatment of Subjects in RDA:** No action at this time – waiting for reconciliation work by the FRBR Review Group. ALA’s SAC-RDA Subcommittee to consider developing a proposal for a high-level relationship element in chapter 23 for JSC consideration in 2014.

**6JSC/ALA/Discussion/3, Instructions for Recording Relationships: Discussion Paper:** Issues discussed; referred back to ALA for creation of proposal in 2014.

## **Follow-up Actions for ALA**

*The following list identifies work for ALA arising from the 2013 JSC meeting.*

### **1. Machine-Actionable Data Elements in RDA (6JSC/ALA/Discussion/1):**

The JSC sees the CC:DA Task Force on Machine-Actionable Data Elements in RDA Chapter 3 remaining as the primary agent for this proposal/set of proposals. Coordination will be needed with the soon-to-be-formed JSC RDA/ONIX Framework Working Group, as well as with the rest of the JSC. The goal will be to bring forward definite proposals for as much as possible by August. This includes:

- Development of an element for Extent of expression
- Creation of RDA revision proposals that build on the Aspect-Unit-Quantity model
- Review of issues raised in 6JSC/CCC/14, relating to dimensions of still images

## 2. **Instructions for Recording Relationships** (6JSC/ALA/Discussion/3)

The CC:DA Task Force to investigate the instructions for recording relationships in RDA needs to consider the feedback received in the written responses and in the summaries of the JSC discussion of this paper and develop revision proposals for RDA chapters 24-28.

## 3. **Appendix K Revision** (6JSC/ALA/25)

As an outcome of the JSC discussion, I analyzed the terms and relationships in the original proposal and then used that as the basis for a rough draft of a revised version of the proposal, which I have shared with the CC:DA Task Force on Relationship Designators in RDA Appendix K. This will serve as the basis for a revised proposal for CC:DA to discuss at ALA Annual.

## 4. **Treatment of Subjects in RDA** (6JSC/ALA/Discussion/2)

The work to develop a proposal for a high-level relationship element in chapter 23 will be undertaken by the RDA-SAC Subcommittee.

### *Possible ALA action:*

Part of the ALA response to 6/JSC/ACOC/9 (Qualifications after an identifier – Amendments to RDA 2.15.1.7) stated: “We believe that consideration should be given to divide this element into subelements, to make the data more machine-actionable. We see the potential for three distinct data elements: identifier scheme/agency, identifier, qualifier.”

**Question: Does CC:DA want to pursue this?**

### *Previous ALA commitments, still pending:*

In 2010, in response to JSC/Sec/1, Issues deferred until after the first release of RDA, ALA made the following commitments that have not yet been completed:

- a. Bible – Apocrypha: Make a distinction between Apocryphal books and the Old Testament Apocrypha. Related to 6JSC/DNB/1, Parts of the Bible: Books (RDA 6.23.2.9.2). **Wait for 2014 proposal from DNB/LC to see if this issue is resolved.**
- b. Bible – Year: Move instructions for recording the year for the Bible and parts of the Bible from 6.24.1.4 to the general instructions for Date of Expression in 6.10. **Referred to American Theological Library Association, Association of Jewish Libraries, and the Catholic Library Association; no priority assigned.**
- c. Bible – Version: Question the appropriateness of numerical limitations to “three or more languages” and “two translators” in RDA 6.25.1.4. **Referred to American Theological Library Association, Association of Jewish Libraries, and the Catholic Library Association; no priority assigned.**

- d. Expressions of religious works: Useful to generalize these instructions to include all sacred scriptures (beyond the reference to 6.27.3). **Referred to American Theological Library Association, Association of Jewish Libraries, and the Catholic Library Association; no priority assigned.**
- e. Illustrative content (7.15): scope is not limited to graphic images, but the list of terms under the alternative at 7.15.1.3 is restricted to illustrations that appear in print. Should that list be extended to include things like audio and video clips? **Referred to Online Audiovisual Catalogers; low priority.**
- f. General Guidelines on Recording Names Containing a Surname (9.2.2.9), General Guidelines on Recording Names Consisting of a Phrase (9.2.2.22), and Phrase Consisting of a Given Name or Given Names Preceded by a Term of Address, Etc. (9.2.2.23): In 2010, ALA believed that the distinction between these situations was unclear. **Identified as medium priority. Has the RDA rewording project solved this problem?**

*Other outstanding commitments:*

- As an outcome of the JSC meeting in 2011, ALA agrees to investigate the inconsistency between the Statement of Responsibility element in Chapter 2 and the Performer, Narrator, Presenter and Artistic and/or Technical Credit elements in Chapter 7. **OLAC/MusLA developed a discussion paper for CC:DA in 2013. Can a discussion paper or proposal be ready for the 2014 JSC meeting?**
- In 2012, ALA withdrew 6JSC/ALA/16, Video encoding formats, in the face of strong preferences for using external vocabularies. Although major changes to the current list of video encoding formats will not be made, ALA was asked to make proposals to correct errors. **OLAC sees a real need to be able to express the things described in the proposal but doesn't have the right type of technical expertise. Does CC:DA agree with OLAC that this is important? Is any other group associated with CC:DA willing to take this on?**