

Date: 5 June 2015
To: ALA/ALCTS/CaMMS/Committee on Cataloging: Description and Access (CC:DA)
From: CC:DA Task Force on Relationship Designators in RDA Appendix K
Subject: RDA Appendix K Revision and Expansion

Background

After nearly a year of inactivity because of membership changes (including the chair), the CC:DA task force charged with proposing a set of relationship designators for inclusion in RDA Appendix K (Relationships between Persons, Families, and Corporate Bodies) was reconstituted in November 2014 with the following membership: Robert L. Maxwell, chair; Jennifer Baxmeyer; Cory Nimer; Adam Schiff; Larisa Walsh. Also participating are Kathy Glennan, ALA representative to the Joint Steering Committee, and Robert Rendall, CC:DA chair.

The original task force had submitted a proposal to the Joint Steering Committee in November 2013, which was returned with requests for change. Because of the noted personnel changes to the task force, a revised document was not ready in time for the November 2014 meeting. This document contains the task force's recommendations which will form the basis of the ALA proposal to be discussed at the JSC November 2015 meeting.

A fuller set of designators in Appendix K is badly needed in current cataloging. The task force is asking the JSC to consider the document as a whole, including its organization, but to approve as many of the individual designators as possible regardless of its position on incorporating the document as a whole. We are aware that a JSC working group is currently considering general questions about relationship designators, but the designators enumerated in this document themselves are needed and we request that Appendix K expansion not wait for the full outcomes of the JSC working group. Currently new designators are appearing in all the designator appendixes through the fast-track process, which in the case of Appendix K is resulting in a piecemeal expansion.

Organization

The relationship designators in this document are grouped according to whether they are applicable generally to persons, families and corporate bodies or specific to one entity. Designators included in K.2 may be used by one than one entity or have reciprocal relationships with more than one entity. Designators specific to persons are found in K.3, families in K.4, and corporate bodies in K.5. This results in an organization where each designator is listed only once.

Unlike current RDA, in this document all relationship designator definitions are followed by their respective reciprocal designators. In some cases the designator and its reciprocal are found in different general sections of Appendix K. These are marked by "see" references. A reciprocal found within the same general section as its designator is not so marked.

Designators currently in RDA Appendix K, or equivalents of designators currently in Appendix K, are marked with an asterisk, with the equivalent RDA designator or application in brackets at the end of the line if it is different from that proposed in this document.

This revision proposal also includes a related revision to RDA 29. This was necessary because nothing in Chapter 29 currently supports general agent-to-agent relationships.

Comments

Person to person family relationships

K.3.1.2 covers person to person relationships within a family, and it is legitimate to ask whether these are bibliographically significant, since we are building a bibliographic, not a genealogical, database. While we would not expect catalogers to record all such known relationships, frequently they are indeed bibliographically significant. For example, Steve Miller and Sharon Lee, husband and wife, routinely write science fiction books together. Their relationship is bibliographically significant, and it would be appropriate to link the two persons:

Miller, Steve, 1950 July 31-

see also

Spouse: Lee, Sharon, 1952-

Spouse: Lee, Sharon, 1952-

see also

Spouse: Miller, Steve, 1950 July 31-

Similarly, Todd McCaffrey is now writing sequels to his mother Anne McCaffrey's novels and wrote jointly with her before she died. This is also a bibliographically significant family relationship. There are often father and son printers in the early printing period who are frequently confused with each other; linking their records by recording the parent/child relationship would benefit users of the database. A related example is that of an 18th century printer and his widow, who continues the business after he dies.

This is obviously a matter of judgment, but if a cataloger feels it is important and helpful to the user of the database to record a person to person family relationship, he or she should not be prevented from doing so by the lack of appropriate designators.

The relationship designators "family" and "corporate body"

Current RDA has the relationship designators "family" and "corporate body". All these terms do is name the entity at the other end of the relationship, i.e. "this person is related to a family" or "this person is related to a corporate body." The designators are meant to convey that the entity is a member of the family or corporate body, but the terms themselves do not convey that meaning. The current terms could be taken to mean that the person has any kind of relationship to the family or corporate body, and there are many other possible relationships than membership. As a principle of describing relationships, it does not seem appropriate to use a term that is the same as the name of the related class of entity ("family" or "corporate body") as a description of the relationship. Therefore, this document replaces the relationship

“family” and “corporate body” with “member of.” The current relationship designator “member” to relate a person to a corporate body does not need changing, but in keeping with the practice elsewhere in the document of using a unified term to designate relationships that are the same even though the related entities may be different, the reciprocal “family member” is replaced with “member.”

Relationships of families to corporate bodies

The relationship designators founder/founder of have been partially generalized and appear in K.2.1 in a relationship between families and corporate bodies:

founder A person, family, or corporate body that establishes the related family or corporate body.

Reciprocal relationship: founder of

founder of A family or corporate body that the related person, family, or corporate body establishes.

Reciprocal relationship: founder

How can a family be founded by a corporate body? The RDA definition of family has a broader scope than simply blood-related families: “The term family refers to two or more persons related by birth, marriage, adoption, civil union, or similar legal status, *or who otherwise present themselves as a family.*” Under the RDA definition it is feasible for a corporate body to found an entity that presents itself as a family.

Relationships within entity descriptions (authorized access point to/from variant access point)

When the task force considered the relationship types in FRAD¹, they discovered one that applies to a relationship between FRAD entities that are not considered separate entities in RDA. This FRAD relationship is called the secular/religious relationship (FRAD section 5.3.1, p. 61-62). In current cataloging practice, reflected in RDA, assumption of a religious name is generally treated as a name change with the previous name recorded as a variant access point, unless the person is better known by the secular name. In either case, the person is recorded in one, not two, descriptions because RDA does not consider a change of name to create separate person entities (unlike its treatment of pseudonyms). The task force feels that a designator is needed for this relationship, but implementation would require a change of practice allowing designators to be used with variant names:

Bergoglio, Jorge Mario, 1936-

see

Name in religion: Francis, Pope, 1936-

Louis, Father, 1915-1968

see

Secular name: Merton, Thomas, 1915-1968

This change in practice would be useful for recording other relationships as well, e.g., other relationships between an earlier name and a later name when the entity only has one bibliographic identity:

¹ *Functional Requirements for Authority Data* (Saur, 2009)

Morrison, Marion Robert, 1907-1979

see

Later name: Wayne, John, 1907-1979

Schlossberg, Caroline Kennedy, 1957-

see

Earlier name: Kennedy, Caroline, 1957-

How does this fit the model? All relationships look like this:

Entity A <= Relationship => Entity B

A fundamental of the entity-relationship database structure is that a relationship cannot exist between things that aren't entities; and each relationship is a single relationship but it has to go both ways. The relationship itself is described by a designator and we talk about a designator having a reciprocal, but in reality there is only one relationship and so reciprocals are simply a problem of the English language, which often can't describe the relationship going from left to right (A to B) with the same words as the *same* relationship when looked at from right to left (B to A). The relationship designator and its reciprocal are defining the same relationship, and all relationships, including the one we're trying to describe here, can be looked at in either direction.

Thus, in order to describe relationships between different names for the same person those names must be treated as if they themselves were entities. Fortunately, the model does provide for this, the relationships between "name" entities in FRAD (3.4, p. 31), further developed as "nomen" entities in FRSAD (3.5, p. 21-24).² RDA doesn't yet explicitly recognize nomen as an entity (it hadn't been fully developed when RDA was written), but by introducing the concept of preferred and variant names, RDA in fact has the concept "nomen" embedded in it. In fact, at many points in captions RDA names the relationship between different names even though it does not call these captions relationship designators. For example, 11.2.3.4-7 names several categories of variant names of corporate bodies: expanded name; acronym/initialism/abbreviated form/ alternative linguistic form of name; other variant name. These describe the relationship between the variant and the preferred name, i.e., they are in fact informal relationship designators. For other examples, see 9.2.3.4-10; 10.2.3.4-6; 16.2.3.5-8.

So it is legitimate to describe the relationship between nomens in RDA and to treat them as if they were entities. FRSAD describes the nomen-to-nomen relationship in some detail (5.4, p. 31-32).

This relationship exists between variant names and preferred names, as seen in the examples given above, but potentially may also exist between any nomen and any other nomen, e.g., between two different variant names. For example, one variant could be an earlier name than another variant (e.g. in a case where a person has changed names twice or more). In our current MARC authority record structure it

² *Functional Requirements for Subject Authority Data* (IFLA, 2010) <http://www.ifla.org/files/assets/classification-and-indexing/functional-requirements-for-subject-authority-data/frsad-final-report.pdf>

isn't possible to bring out a variant-to-variant relationship because addition of a relationship designator to an access point (4XX or 5XX) is assumed to record a relationship to the preferred name (there is no way of marking another relationship); and we don't add the reciprocal relationship designator to the preferred name because there is no mechanism to record for which name (when there is more than one) the relationship is being recorded. So the current system allows us only to link variant names to the preferred name (which is why the relationship might also misleadingly appear to be uni-directional). In an entity-relationship/linked data environment we could link a preferred name with any a specific variant and record the exact relationship to it, and we would also be able to link a specific variant with another specific variant and record the exact relationship between those two names. This is not possible now, but RDA is supposed to be capable of recording information beyond MARC's capabilities, so there's no reason we need to limit ourselves to the structure that is possible now; and in the meantime we can introduce a number of relationship designators that would be useful even in the current environment.

Because RDA currently does not recognize these as separate entities, the task force has set designators for relationships within single entity descriptions apart in a separate section from the others, K.3.4, but unlike other sections we have not given users the option to record relationship designators with identifiers, because RDA does not currently provide for identifiers for names (e.g. preferred and variant names). Because of the future potential for linking any name, not just variants to preferred names, the title of the section was kept general: "Relationship Designators to Relate Different Names of a Person", and scope notes do not refer to preferred or variant names, although it expected that at least for the near future the designators will only relate variant names to preferred names. General section K.3 was chosen because all the relationships the task force developed apply to persons. Similar designators could be devised for names of a family, or names of a corporate body. If so, the structure could parallel the rest of the Appendix. For example, with a sampling of possible designators:

K.2.2. Relationship Designators to Relate Different Names of a Person, a Family, or a Corporate body

contracted name An acronym, initialism, or abbreviated form of a name of a person, family, or corporate body. *Reciprocal relationship:* expanded name

expanded name An expanded or fuller form of name of a person, family, or corporate body. *Reciprocal relationship:* contracted name

transliterated form of name A name of a person, family, or corporate body in a form transliterated from the script in which it appears on sources from which it is taken. *Reciprocal relationship:* vernacular form of name

vernacular form of name A name of a person, family, or corporate body in the script in which it appears on sources from which it is taken. *Reciprocal relationship:* transliterated form of name

K.3.4. Relationship Designators to Relate Different Names of a Person

[see below, in the proposal itself]

K.4.4. Relationship Designators to Relate Different Names of a Family

form of name based on hereditary title A name of a family based on a hereditary title.

Reciprocal relationship: form of name not based on hereditary title

form of name not based on hereditary title A name of a family not based on a hereditary title. *Reciprocal relationship:* form of name based on hereditary title

K.5.4. Relationship Designators to Relate Different Names of a Corporate Body

direct form of name A direct form of a name of a corporate body. *Reciprocal relationship:* inverted form of name

inverted form of name An inverted form of a name of a corporate body. *Reciprocal relationship:* direct form of name

We recommend that the Joint Steering Committee accept the concept of relationships between different names of a single entity, including the designators recommended in K.3.4 of the proposal. If it does, ALA would be willing to further develop a set of designators of this type following the structure suggested above.

The attributive relationship

The attributive relationship is the relationship between a person and another person who has assumed the first person's identity in order to create a work. This happened with some frequency in the ancient world, where a work was attributed to some famous person in order to give the work more credibility.

These are most commonly found as "Pseudo-..." names (see RDA 9.2.2.24 and the example of Pseudo-Brutus under 30.1.1.3). In many cases scholars refer to the otherwise unknown authors of works attributed to another by attaching the word "Pseudo-" to the front of the other person's name (or a form of the name). These otherwise unknown persons are commonly identified by this "Pseudo" name. For example, many works not written by the early Church Father Augustine were attributed to him, i.e., published under his name. Many of these works are now commonly identified as by "Pseudo-Augustinus." This person entity has a relationship to "Augustine, Saint, Bishop of Hippo." This relationship is *not* a relationship between a person entity and a work entity; it is a relationship between two person entities:

Pseudo-Augustinus

see also

Appropriated identity: Augustine, Saint, Bishop of Hippo

Augustine, Saint, Bishop of Hippo

see also

Appropriator of identity: Pseudo-Augustinus

Deferred Issues

Generalization of alternate identity/real identity

The CC:DA Task Force on Fictitious and Pseudonymous Corporate Bodies concluded that the Alternate identity/Real identity relationship can apply to families and corporate bodies as well as to persons. The Task Force on Appendix K agrees. The task force did not generalize the relationship to K.2 in the proposed document, because this issue is currently being discussed by the JSC Working Group on Fictitious Characters; however, we would like to see the relationship generalized, allowing the relationship designators to be used with persons, families, or corporate bodies.

Relationship designators for jurisdictions

The following designators for relationships between jurisdictions are needed and were proposed in an earlier draft of this document as part of Appendix K on the basis that jurisdictions are also corporate bodies. However, it was thought likely that the JSC would prefer to class them with the place entity and if so we recommend that they be given in Appendix L, currently empty.

capital A jurisdiction that is the official seat of the related government of the state, territory, nation, etc.
Reciprocal relationship: capital of

county seat A jurisdiction that is the administrative center or seat of government of the related county. *Reciprocal relationship:* county seat of

capital of A state, territory, nation, etc. that is the official seat of the related government. *Reciprocal relationship:* capital

county seat of A city, town, etc., that is the administrative center or seat of government of the related county. *Reciprocal relationship:* county seat

first-order administrative division A primary administrative division of the related country, such as a state in Australia or the United States, or a province in Canada or Indonesia. *Reciprocal relationship:* first-order administrative division of

first-order administrative division of A country in which the related primary administrative division, such as a state in Australia or the United States, or a province in Canada or Indonesia, is located.
Reciprocal relationship: first-order administrative division

Cross-appendix reciprocals

If these designators for jurisdictions are placed in an appendix other than K, the issue of reciprocals in another appendix will arise. Some of these terms will have reciprocals in K. For example, a government (a town, a country, presumably covered in appendix L) may have a relationship with a corporate body. Consider this:

Barrington Area Council of Governments

see also

Member: Barrington (Ill.)

Member: Barrington Hills (Ill.)

...

Barrington (Ill.)

see also

Member of: Barrington Area Council of Governments

Jurisdictions might easily have recordable relationships with persons or families as well. Catalogers should be free to record relationships they find relevant and useful even though they may cross boundaries within RDA. The task force raises this issue as one that needs to be resolved, but one that is outside of its charge.

Fictitious characters

A relationship designator is needed to record the relationship between a fictitious character and its creator:

character created by a person who created the related fictitious character. *Reciprocal relationship: created character*

created character a fictitious character created by the related person. *Reciprocal relationship: character created by*

In current RDA practice, this would be a relationship between two persons and would be used as follows:

Bond, James (Fictitious character)

see also

Character created by: Fleming, Ian, 1908-1964

Fleming, Ian, 1908-1964

see also

Created character: Bond, James (Fictitious character)

We are aware that the JSC has a working group on fictitious characters, and that the usage of fictitious character access points may change in the future (e.g., their ability to be creators is in question) but there is in fact a relationship between a fictitious character and its creator, and it needs to be recorded. This designator is needed now, and is appropriate in current RDA; we also believe it will be needed in the future. The task force did not include it in the current proposal because it seemed unlikely that the JSC would approve it in the current environment; however, we would like the designator to be available for use.

Protagonist

A relationship designator is also needed to record the relationship between a principal character of a work (the protagonist) and the related work.

protagonist a person who is a principal character in the related work. *Reciprocal relationship: protagonist of*

protagonist of a work in which the related person is a principal character. *Reciprocal relationship: protagonist*

We discuss this here because it is related to the question of relationship designators for fictitious characters, but this designator is not completely parallel to “character created by/created character” because the protagonist might be a real person (e.g. in a work of historical fiction).

Austen, Jane, 1775-1817. *Pride and prejudice*

see also

Protagonist: Bennet, Elizabeth (Fictitious character)

Protagonist: Darcy, Fitzwilliam (Fictitious character)

Bennet, Elizabeth (Fictitious character)

see also

Protagonist of: Austen, Jane, 1775-1817. *Pride and prejudice*

Graves, Robert, 1895-1985. *I, Claudius*

see also

Protagonist: Claudius, Emperor of Rome, 10 B.C.-54 A.D.

Claudius, Emperor of Rome, 10 B.C.-54 A.D.

see also

Protagonist of: Graves, Robert, 1895-1985. *I, Claudius*

Sound of music (Motion picture)

see also

Protagonist: Trapp, Maria Augusta

Protagonist: Trapp, Georg von, 1880-1947

Trapp, Maria Augusta

see also

Protagonist of: *Sound of music* (Motion picture)

This relationship designator pair appears to belong in Appendix I. Because it is peripheral to the Appendix K proposal, this section probably will not be part of the ALA Appendix K proposal document. CC:DA may wish to send this separately as a fast track proposal for Appendix I.

APPENDIX K :

Relationship Designators: Relationships Between Persons, Families, and Corporate Bodies

K.0 Scope

This appendix provides general guidelines on using relationship designators to specify relationships between persons, families, and corporate bodies, and lists relationship designators used for that purpose.

Relationship designators are defined using the present tense, with the understanding that the terms can be used for relationships that took place in the past.

K.1 General Guidelines on Using Relationship Designators

The defined scope of a relationship element provides a general indication of the relationship between persons, families, and corporate bodies (e.g., related person, related corporate body). If the relationship element is considered sufficient for the purposes of the agency creating the data, do not use a relationship designator to indicate the specific nature of the relationship.

Relationship designators provide more specific information about the nature of the relationship (e.g. employee, predecessor).

Use relationship designators at the level of specificity that is considered appropriate for the purposes of the agency creating the data. For example, the relationship between a corporate body and the person who is its chief executive can be recorded using either the specific relationship designator *chief executive* or the more general relationship designator *officer*.

If none of the terms listed in this appendix is appropriate or sufficiently specific, use another concise term to indicate the nature of the relationship.

K.2 Relationship Designators for Related Persons, Families, or Corporate Bodies

K.2.1 Relationship Designators to Relate Persons, Families or Corporate Bodies to Other Persons, Families, or Corporate Bodies

Record an appropriate term from the list below with the authorized access point or identifier for a related person, family, or corporate body (see 29.5). Apply the general guidelines on using relationship designators at K.1.

* **ancestor** A person or family from whom the related person or family descends. *Reciprocal relationship*: descendant [*current RDA*: progenitor (*only person-to-family*)]

appointee A person, family, or corporate body that is designated by the related person, family, or corporate body to fill an office or position. *Reciprocal relationship*: appointee of

appointee of A person, family, or corporate body that designates the related person, family, or corporate body to fill an office or position. *Reciprocal relationship*: appointee

associated with A person, family, or corporate body that is associated with the related person, family, or corporate body in a generic way. *Reciprocal relationship*: associated with

client A person, family, or corporate body that utilizes the professional services of the related person, family, or corporate body. *Reciprocal relationship*: client of

client of A person, family, or corporate body that provides professional services to the related person, family, or corporate body. *Reciprocal relationship:* client

collaborator A person, family, or corporate body that collaborates with or worked together in some way with the related person, family, or corporate body. *Reciprocal relationship:* collaborator

* **descendant** A person or family that descends from the related person or family. *Reciprocal relationship:* ancestor [*current RDA:* descendants (*only family-to-person*); descendant family (*only family-to-family*)]

distinguished from A person, family, or corporate body that is often confused with the related person, family, or corporate body in scholarly or popular literature. *Reciprocal relationship:* distinguished from

* **employee** A person, family, or corporate body that is employed by the related person, family, or corporate body. *Reciprocal relationship:* employer [*current RDA:* *only person-to-corporate body*]

* **employer** A person, family, or corporate body that employs the related person, family, or corporate body. *Reciprocal relationship:* employee [*current RDA:* *only corporate body-to-person*]

event organizer A person, family, or corporate body that organizes the related event. *Reciprocal relationship:* organized event

* **founder** A person, family, or corporate body that establishes the related family or corporate body. *Reciprocal relationship:* founder of [*current RDA:* founder (*only person-to-corporate body*); founding family (*only family-to-corporate body*); founding corporate body (*only corporate body-to-corporate body*)]

* **founder of** A family or corporate body that the related person, family, or corporate body establishes. *Reciprocal relationship:* founder [*current RDA:* founded corporate body (*only corporate body-to-person or corporate body-to-family*)]

influenced A person, family, or corporate body that is influenced by the related person, family, or corporate body. *Reciprocal relationship:* influenced by

influenced by A person, family, or corporate body that influences the related person, family, or corporate body. *Reciprocal relationship:* influenced

leader A person, family, or corporate body that leads the related person, family, or corporate body. For a leader who also holds an office in a corporate body, see officer (K.3.3). *Reciprocal relationship:* leader of

leader of A person, family, or corporate body led by the related person, family, or corporate body. For a corporate body in which the leader is also an officer, see officer of (K.5.1) *Reciprocal relationship:* leader

* **member** A person, family, or corporate body that is a member of the related family or corporate body. *Reciprocal relationship:* member of [*current RDA:* member (*only person-to-corporate body*); family member (*only person-to-family*)]

* **member of** A family or corporate body to which the related person, family, or corporate body belongs. *Reciprocal relationship:* member [*current RDA:* family (*only family-to-person*); corporate body (*only corporate body-to-person*); corporate member (*only corporate body-to-corporate body*); membership corporate body (*only corporate body-to-corporate body*)]

named for A person, family, or corporate body whose name is used by the related person, family, or corporate body. *Reciprocal relationship:* namesake

namesake A person, family, or corporate body that is specifically named after the related person, family, or corporate body. *Reciprocal relationship:* named for

owner A person, family, or corporate body that owns the related person, family, or corporate body. *Reciprocal relationship:* owner of

owner of A person, family, or corporate body that is owned by the related person, family, or corporate body. *Reciprocal relationship:* owner

organized event An event that is organized by the related person, family, or corporate body. *Reciprocal relationship:* event organizer

participant A person, family, or corporate body that takes part in the related event. *Reciprocal relationship:* participant in

competitor A participant that competes in the related event. *Reciprocal relationship:* competitor in

participant in An event in which the related person, family, or corporate body participates. *Reciprocal relationship:* participant

competitor in An event in which the related participant competes. *Reciprocal relationship:* competitor

possibly identified with A person, family, or corporate body that may possibly be the same entity as another person, family, or corporate body, but which has not yet been firmly established and accepted as the same. *Reciprocal relationship:* possibly identified with

* **predecessor** A family that precedes the related family; or a corporate body that precedes the related corporate body. *Reciprocal relationship:* successor [*current RDA:* only corporate body-to-corporate body]

publisher A person, family, or corporate body that publishes a work of the related person, family, or corporate body. *Reciprocal relationship:* publisher of

publisher of A person, family, or corporate body whose work is published by the related person, family, or corporate body. *Reciprocal relationship:* publisher

related to A person, family, or corporate body that is related in some way to another person, family or corporate body, but the specific nature of the relationship is not known or cannot be specified. *Reciprocal relationship:* related to

* **sponsor** A person, family, or corporate body that provides donated support to the related person, family, or corporate body. *Reciprocal relationship:* sponsor of [*current RDA:* sponsor, sponsoring family, sponsoring corporate body]

* **sponsor of** A person, family, or corporate body that receives donated support from the related person, family, or corporate body. *Reciprocal relationship:* sponsor [*current RDA:* sponsored corporate body (*only corporate body-to-family or corporate body-to-corporate body*)]

* **successor** A family that succeeds or follows the related family; or a corporate body that succeeds or follows the related corporate body. *Reciprocal relationship:* predecessor [*current RDA:* only corporate body-to-corporate body]

K.3 Relationship Designators for Related Persons

K.3.1 Relationship Designators to Relate Persons to Other Persons

Record an appropriate term from the list below with the authorized access point or identifier for a related person (see 30.1). Apply the general guidelines on using relationship designators at K.1.

K.3.1.1 General Person to Person Relationships

* **alternate identity** Another identity that is assumed by the related person. *Reciprocal relationship*: real identity

apprentice A person learning a trade from the related master, typically at low pay for a fixed period. *Reciprocal relationship*: master

appropriated identity An identity that has been assumed by the related person in order to impersonate the other person. *Reciprocal relationship*: appropriator of identity

appropriator of identity A person who has falsely assumed the name of the related person. *Reciprocal relationship*: appropriated identity

assistant A person serving in an immediately subordinate position to the related person. *Reciprocal relationship*: assistant to

assistant to A person serving in an immediately superior position to the related person. *Reciprocal relationship*: assistant

business associate A partner or companion to the related person in business or at work. *Reciprocal relationship*: business associate

co-worker A person who works with or shares a task with the related person. *Reciprocal relationship*: co-worker

colleague A fellow member of a profession, staff, or academic faculty. *Reciprocal relationship*: colleague

fellow student An associate of the related student who is also formally engaged in learning. *Reciprocal relationship*: fellow student

friend A person who shares a bond of mutual affection or regard with the related person. *Reciprocal relationship*: friend

godchild A child who is presented at baptism by the related person, who takes an interest in the child's personal development; or in a secular context, a child whose parents have chosen the related person to take an interest in the child's personal development. *Reciprocal relationships*: godparent

godparent A person who presents the related child for baptism; or a person who is chosen by the child's parents to take an interest in the child's upbringing and to take care of the child should anything happen to the parents. *Reciprocal relationships*: godchild

guardian A person who is appointed to manage the affairs of the related person because that person is unable to conduct those affairs independently. *Reciprocal relationship*: ward

master A person who teaches a trade to the related apprentice who typically works at low pay for a fixed period. *Reciprocal relationship*: apprentice

partner A person working with the related person in an activity of common interest, most often, a business partnership. *Reciprocal relationship*: partner

* **real identity** A person who assumes the related alternate identity. *Reciprocal relationship*: alternate identity

student A person who receives instruction from the related person. *Reciprocal relationship*: teacher

teacher A person who instructs the related person. *Reciprocal relationship*: student

ward A person who is placed in the care of the related person. *Reciprocal relationship*: guardian

See also K.2.1.

K.3.1.2 Person to Person Relationships Within a Family

relative A person who is connected to the related person by blood, marriage, civil union, or other similar legal status. *Reciprocal relationship:* relative

aunt/uncle A sibling of the related person's parent. *Reciprocal relationship:* nephew/niece

child A son or daughter of the related person. *Reciprocal relationship:* parent

adoptive child A person who is assigned to the role of child of the related person by legal action. *Reciprocal relationships:* adoptive parent

child-in-law A child of the related person by marriage, civil union, or other similar legal status. *Reciprocal relationship:* parent-in-law

grandchild A child of the related person's child. *Reciprocal relationships:* grandparent

great-grandchild A child of the related person's grandchild. *Reciprocal relationships:* great-grandparent

step-child A child of the related person by a new marriage, civil union, or other similar legal status. *Reciprocal relationships:* step-parent

cousin A child of the related person's aunt or uncle. *Reciprocal relationship:* cousin

domestic partner A person other than a spouse with whom the related person cohabits. For persons partnered to the related person by marriage, civil union, or other similar legal status, use spouse. *Reciprocal relationship:* domestic partner

nephew/niece A child of a sibling of the related person. *Reciprocal relationships:* aunt/uncle

parent A father or mother of the related person. *Reciprocal relationships:* child

adoptive parent A person assigned by legal action to the role of parent of the related person. *Reciprocal relationships:* adoptive child

parent-in-law A parent of of the related person's spouse. *Reciprocal relationships:* child-in-law

grandparent A parent of the related person's parent. *Reciprocal relationships:* grandchild

great-grandparent A parent of the related person's grandparent. *Reciprocal relationships:* great-grandchild

step-parent A parent of the related person by a new marriage, civil union, or other similar legal status. *Reciprocal relationships:* step-child

sibling A person having one or both parents in common with the related person. *Reciprocal relationship:* sibling

half-sibling A sibling having one parent in common with the related person. *Reciprocal relationship:* half-sibling

sibling-in-law A sibling of the related person by marriage, civil union, or other similar legal status. *Reciprocal relationship:* sibling-in-law

step-sibling A sibling of the related person by a new marriage, civil union, or other similar legal status. *Reciprocal relationship*: step-sibling

spouse A person who is partnered to the related person by marriage, civil union, or other similar legal status. For a person other than a spouse with whom the related person cohabits, use domestic partner. *Reciprocal relationship*: spouse

See also K.2.1.

K.3.2 Relationship Designators to Relate Persons to Families

Record an appropriate term from the list below with the authorized access point or identifier for a related person (see 30.1). Apply the general guidelines on using relationship designators at K.1.

See K.2.1.

K.3.3 Relationship Designators to Relate Persons to Corporate Bodies

Record an appropriate term from the list below with the authorized access point or identifier for a related person (see 30.1). For definitions of reciprocal relationship designators listed here, see K.5.1. Apply the general guidelines on using relationship designators at K.1.

attendee A person who receives instruction at the related educational institution. *Reciprocal relationship*: student at

delegate A person who represents a corporate body at the related conference, meeting, event, etc. *Reciprocal relationship*: delegate to

* **graduate** A person who receives an academic degree from the related granting institution or faculty. *Reciprocal relationship*: graduate of

officer A person holding an office in or commanding the related corporate body. For a leader who does not hold an office in a corporate body, use leader (see K.2.1). *Reciprocal relationship*: officer of [*current RDA*: incumbent]

office held by A person who is identified by the related corporate identity when acting as a head of state, head of government, head of an international intergovernmental body, or a religious official. *Reciprocal relationship*: office held

chief executive An officer who is chief executive of the related corporate body. *Reciprocal relationship*: chief executive of

trustee An officer granted the powers of administration in the related corporate body in order to act for its benefit. *Reciprocal relationship*: trustee of

representative A person who represents the related corporate body at a conference, meeting, event, etc. *Reciprocal relationship*: representative of

ward A person placed in the care of the related corporate body. *Reciprocal relationship*: guardian

See also K.2.1.

K.3.4 Relationship Designators to Relate Different Names of a Person

Record an appropriate term from the list below with the variant access point for a related authorized access point. Apply the general guidelines on using relationship designators at K.1.

other name A name borne by the person that is different from another name borne by the person. *Reciprocal relationship*: other name

earlier name A name that the person bore previous to assuming another name. *Reciprocal relationship*: later name

name before gender change A name borne by the person previous to changing gender. *Reciprocal relationship*: name after gender change

name before marriage A name borne by the person previous to marrying. *Reciprocal relationship*: name after marriage

later name A name that the person assumes after bearing another name. *Reciprocal relationship*: earlier name

name after gender change A name borne by the person subsequent to changing gender. *Reciprocal relationship*: name before gender change

name after marriage A name borne by the person subsequent to marrying. *Reciprocal relationship*: name before marriage

name in religion A religious name that is assumed by the person. *Reciprocal relationship*: secular name

secular name A secular name of the person, who has assumed a religious identity. *Reciprocal relationship*: name in religion

K.4 Relationship Designators for Related Families

K.4.1 Relationship Designators to Relate Families to Persons

Record an appropriate term from the list below with the authorized access point or identifier for a related family (see 31.1). Apply the general guidelines on using relationship designators at K.1.

See K.2.1.

K.4.2 Relationship Designators to Relate Families to Other Families

Record an appropriate term from the list below with the authorized access point or identifier for a related family (see 31.1). Apply the general guidelines on using relationship designators at K.1.

See K.2.1.

K.4.3 Relationship Designators to Relate Families to Corporate bodies

Record an appropriate term from the list below with the authorized access point or identifier for a related family (see 31.1). Apply the general guidelines on using relationship designators at K.1.

See K.2.1.

K.5 Relationship Designators for Related Corporate Bodies

K.5.1 Relationship Designators to Relate Corporate Bodies to Persons

Record an appropriate term from the list below with the authorized access point or identifier for a related corporate body (see 32.1). For definitions of reciprocal relationship designators listed here, see K.3.3. Apply the general guidelines on using relationship designators at K.1.

delegate to A conference, meeting, event, etc., that is attended by the related person as the representative of another corporate body. *Reciprocal relationship*: delegate

* **graduate of** An institution or faculty that granted an academic degree to the related person. *Reciprocal relationship*: graduate

guardian A corporate body that is appointed to manage the affairs of the related person who is unable to conduct those affairs independently. *Reciprocal relationship*: ward

* **officer of** A corporate body that the related person commands or in which the person holds an office. For a corporate body in which the related person is a leader but does not hold an office, use leader of (see K.2.1). *Reciprocal relationship*: officer [*current RDA*: officiated corporate body (*only corporate body-to-person*)]

office held A corporate identity of the related person who is a head of state, a head of government, a head of an international intergovernmental body, or a religious official. *Reciprocal relationship*: office held by

chief executive of A corporate body in which the related officer is the chief executive. *Reciprocal relationship*: chief executive

trustee of A corporate body that grants the powers of administration to the related officer in order to act for its benefit. *Reciprocal relationship*: trustee

representative of A corporate body that is represented by the related person at a conference, meeting, event, etc. *Reciprocal relationship*: representative

student at An educational institution that provides instruction to the related person. *Reciprocal relationship*: attendee

See also K.2.1.

K.5.2 Relationship Designators to Relate Corporate Bodies to Families

Record an appropriate term from the list below with the authorized access point or identifier for a related corporate body (see 32.1). For definitions of reciprocal relationship designators listed here, see K.4.3. Apply the general guidelines on using relationship designators at K.1.

See K.2.1.

K.5.3 Relationship Designators to Relate Corporate Bodies to Other Corporate Bodies

Record an appropriate term from the list below with the authorized access point or identifier for a related corporate body (see 32.1). Apply the general guidelines on using relationship designators given under K.1.

* **absorbed corporate body** A corporate body that was absorbed by the related corporate body. *Reciprocal relationship*: absorbing corporate body

* **absorbing corporate body** A corporate body that absorbed the related corporate body. *Reciprocal relationship*: absorbed corporate body

* **broader affiliated body** A corporate body that acts for the related local affiliated body and others at a broader organizational level. *Reciprocal relationship*: local affiliate

* **component of merger** A corporate body that formed the related corporate body by merging with one or more other corporate bodies. *Reciprocal relationship*: product of merger

* **hierarchical subordinate** A corporate body that is subordinate to the related corporate body. *Reciprocal relationship*: hierarchical superior

* **hierarchical superior** A corporate body that is hierarchically superior to the related corporate body. *Reciprocal relationship*: hierarchical subordinate

* **jointly held conference** A conference that is jointly held with the related conference. *Reciprocal relationship*: jointly held conference

* **local affiliate** A local corporate body that is affiliated with the related broader body which acts for it and others at a broader organizational level. *Reciprocal relationship: broader affiliated body*

* **mergee** A corporate body that merged with the related corporate body to form a third. *Reciprocal relationship: mergee*

* **product of merger** A corporate body that resulted from the merger of two or more related corporate bodies. *Reciprocal relationship: component of merger*

* **product of split** A corporate body that resulted from the split or division of the related corporate body. *Reciprocal relationship: split from*

* **split from** A corporate body that split or divided into the related corporate body. *Reciprocal relationship: product of a split [current RDA: predecessor of split]*

See also K.2.1.

Proposed new section (requires renumbering of current 29.5-29.7 to 29.6-29.8)

29.5 Related Person, Family, or Corporate Body

29.5.1 Basic Instructions on Recording Relationships to a Related Person, Family, or Corporate Body

29.5.1.1 Scope

A **related person, family, or corporate body** ▼ is a person, family, or corporate body that is associated with the person, family, or corporate body being identified. These relationships are those that might apply to any of the three entities.

The relationship to the related person, family, or corporate body is recorded using an authorized access point and/or identifier representing the related person, family, or corporate body.

29.5.1.2 Sources of Information

Take information on related persons, families, or corporate bodies from any source.

29.5.1.3 Recording Relationships to a Related Person, Family, or Corporate Body

Record a relationship to a related person, family, or corporate body by applying the general guidelines at 29.4.

[examples]

Changes to current RDA Appendix K

K.2 Relationship Designators for Related Persons**K.2.1 Relationship Designators to Relate Persons to Other Persons**

K.2.4 <u>K.3.1.1</u>	alternate identity	Another A pseudonymous or other identity <u>that is</u> assumed by the <u>related</u> person.
K.2.4 <u>K.3.1.1</u>	real identity	A <u>real</u> person who assumes the <u>related</u> alternate identity.

K.2.2 Relationship Designators to Relate Persons to Families

K.2.2 <u>K.2.1</u>	family member member	A person, <u>family, or corporate body</u> who <u>that is</u> a member of the <u>related</u> family or <u>corporate body</u> .
K.2.2 <u>K.2.1</u>	progenitor ancestor	A person <u>or family</u> from whom the <u>related</u> person <u>or family</u> <u>descends</u> is descended .

K.2.3 Relationship Designators to Relate Persons to Corporate Bodies

K.2.3 <u>K.2.1</u>	employee	A person, <u>family, or corporate body</u> <u>that is</u> employed by the <u>related</u> person, family, or corporate body.
K.2.3 <u>K.2.1</u>	founder	A person, <u>family, or corporate body</u> <u>that establishes</u> who founded the <u>related</u> family or corporate body.
K.2.3 <u>K.3.3</u>	graduate	A person who receives an academic degree from the <u>related</u> granting institution or faculty
K.2.3 <u>K.3.3</u>	incumbent officer	A person holding an office in <u>or commanding</u> the <u>related</u> corporate body. For a leader who does not hold an office in a corporate body, <u>use leader (see K.2.1).</u>
K.2.3 <u>K.2.1</u>	member	A person, <u>family, or corporate body</u> who <u>that is</u> a member of the <u>related</u> family or corporate body.

<u>K.2.3</u> <u>K.2.1</u>	sponsor	A <u>person, family, or corporate body</u> that <u>provides donated support to the related person, family, or sponsoring</u> the corporate body.
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K.3 Relationship Designators for Related Families

K.3.1 Relationship Designators to Relate Families to Persons

<u>K.3.1</u> <u>K.2.1</u>	descendants descendant	A <u>person or family</u> that <u>descends descended</u> from the particular <u>related person or family</u> .
<u>K.3.1</u> <u>K.2.1</u>	family member of	A <u>family or corporate body</u> to which the <u>related person, family, or corporate body</u> belongs.

K.3.2 Relationship Designators to Relate Families to Other Families

<u>K.3.2</u> <u>K.2.1</u>	descendant family descendant	A <u>person or family</u> that <u>descends descended</u> from the <u>related person or other</u> family.
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K.3.3 Relationship Designators to Relate Families to Corporate Bodies

<u>K.3.3</u> <u>K.2.1</u>	founding family founder	A <u>person, family, or corporate body</u> that founded <u>establishes</u> the <u>related family or corporate body</u> .
<u>K.3.3</u> <u>K.2.1</u>	sponsoring family sponsor	A <u>person, family, or corporate body</u> that sponsors <u>provides donated support to</u> the <u>related person, family, or corporate body</u> .

K.4 Relationship Designators for Related Corporate Bodies

K.4.1 Relationship Designators to Relate Corporate Bodies to Persons

<u>K.4.1</u> <u>K.2.1</u>	corporate body member of	A <u>family or corporate body</u> of to which the <u>related person, family, or corporate body</u> <u>belongs</u> is a member .
<u>K.4.1</u> <u>K.2.1</u>	employer	A <u>person, family, or corporate body</u> that employs the <u>related person, family, or corporate body</u> .
<u>K.4.1</u> <u>K.2.1</u>	founded corporate body founder of	A family or corporate body An organization that the <u>related person</u> founded, family, or

		<u>corporate body establishes.</u>
K.4.1 <u>K.5.1</u>	graduate of	An institution or faculty that granted an academic degree to the <u>related person.</u>
K.4.1 <u>K.5.1</u>	officialiated corporate body officer of	A corporate body in which <u>that</u> the <u>related person commands or in which the person holds an office. For a corporate body in which the related person is a leader but does not hold an office, use leader of (see K.2.1).</u>

K.4.2 Relationship Designators to Relate Corporate Bodies to Families

K.4.2 <u>K.2.1</u>	founded corporate body founder of	<u>A family or corporate body An organization that the related person, family founded, or corporate body establishes.</u>
K.4.2 <u>K.2.1</u>	sponsored corporate body sponsor of	<u>A person, family, or corporate body An organization that receives donated support from the related person, family sponsors, or corporate body.</u>

K.4.3 Relationship Designators to Relate Corporate Bodies to Other Corporate Bodies

K.4.3 <u>K.5.3</u>	absorbed corporate body	A corporate body that was absorbed by the <u>related another</u> corporate body.
K.4.3 <u>K.5.3</u>	absorbing corporate body	A corporate body that absorbed the <u>related another</u> corporate body.
K.4.3 <u>K.5.3</u>	broader affiliated body	A corporate body that acts for the <u>related local</u> affiliated body and others at a broader organizational level.
K.4.3 <u>K.5.3</u>	component of merger	A corporate body that formed the other <u>related</u> corporate body by merging with one or more other corporate bodies.
K.4.3 <u>K.2.1</u>	corporate member member of	A family or corporate body <u>to which that is a member of the other related person, family, or corporate body belongs.</u>
K.4.3 <u>K.2.1</u>	founded corporate body founder of	A family or corporate body that the <u>related other person, family, or corporate body founded establishes.</u>

K.4.3 K.2.1	founding corporate body <u>founder</u>	A <u>person, family, or</u> corporate body that <u>establishes</u> founded the other <u>related family or</u> corporate body.
K.4.3 K.5.3	hierarchical subordinate	A corporate body that is subordinate to the other <u>related</u> corporate body.
K.4.3 K.5.3	hierarchical superior	A corporate body that is hierarchically superior to the other <u>related</u> corporate body.
K.4.3 K.5.3	jointly held conference	A conference that is jointly held with <u>the</u> related <u>another</u> conference.
K.4.3 K.5.3	local affiliate	A local corporate body <u>that is</u> affiliated with the <u>related</u> broader body which acts for it and others at a broader organizational level.
K.4.3 K.2.1	membership corporate body <u>member of</u>	A <u>family or</u> corporate body formed from the <u>membership of other</u> <u>to which the related</u> <u>person, family, or</u> corporate bodies <u>body</u> <u>belongs</u> .
K.4.3 K.5.3	mergee	A corporate body that merged with the other <u>related</u> corporate body to form a third.
K.4.3 K.2.1	predecessor	A <u>family that precedes the related family;</u> or a corporate body that precedes the other <u>related</u> corporate body.
K.4.3 K.5.3	predecessor of split <u>split from</u>	A corporate body that split or divided into the other <u>related</u> corporate body.
K.4.3 K.5.3	product of merger	A corporate body that resulted from a merger of two or more other <u>related</u> corporate bodies.
K.4.3 K.5.3	product of split	A corporate body that resulted from a split or division of the other <u>related</u> corporate body.
K.4.3 K.2.1	sponsored corporate body <u>sponsor of</u>	A <u>person, family, or</u> corporate body that is <u>sponsored by</u> <u>receives donated support from</u> the other <u>related person, family, or</u> corporate body.
K.4.3 K.2.1	sponsoring corporate body <u>sponsor</u>	A <u>person, family, or</u> corporate body that <u>sponsors</u> <u>provides donated support to</u> the other <u>related person, family, or</u> corporate body.
K.4.3 K.2.1	successor	A <u>family that succeeds or follows the related</u> <u>family;</u> or a corporate body that succeeds or follows the other <u>related</u> corporate body.