

To: ALCTS Board of Directors
ALCTS/CaMMS Committee on Cataloging: Description and Access

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

Subject: Report on NARDAC and RDA-Related Activities, June-December 2018

NARDAC

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

The 2018 membership of the committee consisted of:

ALA Representatives:

- Dominique Bourassa, Yale University, NARDAC Chair
- Kathy Glennan, University of Maryland

Library of Congress (LC) Representatives:

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

Canadian Committee on Cataloguing (CCC) Representatives:

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

Kathy's term ended at the end of 2018 when she became RSC chair. Stephen Hearn, from the University of Minnesota, has been appointed as the new ALA representative to NARDAC for a three-year term.

NARDAC met virtually via GoToMeeting four times since ALA Annual: July 13, September 7, October 12, November 16, and December 10. During meetings, Kathy and Kate, who are part of the RSC Core Team, kept us informed of the development of the new RDA Toolkit, while Thomas kept us informed of RSC activities. We discussed activities of our respective communities (CC:DA, CCC, and LC) and evaluated requests for changes and additions to RDA.

During our November meeting, we reviewed the NARDAC terms of references (ToR). After discussion, we proposed the following amendments:

- Limiting the term of the RSC representative to two years with a limit of no more than two consecutive terms (to correct a discrepancy between the ToR and the RSC documents);
- Limiting the length of term of the back-up RSC representative to 2 years with no limit on the number of consecutive terms an individual can serve in this position;
- Adding a requirement to consult with both the regional organizations and the RDA Board before changes to the ToR are approved.

Our proposed changes have been approved by ALCTS, CCC, and LC; they have been submitted to the RDA Board.

In the last six months, we have continued to develop the NARDAC pages on the RSC website. We added a section for members' presentations. We uploaded a French translation of the NARDAC ToR. In doing so, we became the first RSC region to include its ToR in more than one language. With the help of ALA Publishing, NARDAC members designed a logo that shows we maintain our connections with RDA while preserving our distinct identity.



NARDAC members have participated in the development of the new RDA Toolkit. All members have reviewed the text of many RDA elements; Thomas undertook a project to review and reword the 96 appellation elements. At the request of Ahava Cohen, from the European RDA Interest Group, we have recommended catalogers from North America to investigate Western biases in RDA.

In order to fulfill our charge to keep the North American communities informed of RDA developments, NARDAC members have participated in the following events:

- Dominique presented “News from NARDAC: The North American Region Takes Shape” at the RDA Forum held June 23, 2018, during the American Library Association conference in New Orleans, Louisiana (available at <http://www.rda-rsc.org/sites/all/files/NARDAC-RDA-Forum-2018-06-23.pdf>).
- Dominique and Kathy participated in the meeting of the PCC Standing Committee on Standards on June 24 to discuss with members the development of RDA and its impact on the creation and revision of LC-PCC statements.
- Kathy presented “Rebooting RDA: A Look at the 3R Project” at the American Association of Law Libraries annual meeting on July 16, 2018.
- Kathy and Thomas participated with Gordon Dunsire, Chair of RSC and James Hennelly, Director of RDA Toolkit, in the American Libraries Live webinar “What’s Next for RDA and the 3R Project?” (accessible at <https://alapublishing.webex.com/alapublishing/lsr.php?RCID=98e035ae05a54ec2a7930041ff1797b6>).
- Dominique and Nathalie presented “NARDAC, les neuf premiers mois” (“NARDAC, the First Nine Months”) at the RSC outreach event in Montreal on October 22 (available in French at <http://www.rda-rsc.org/sites/all/files/NARDAC%20les%20neuf%20premiers%20mois-FR.pdf> and in English at <http://www.rda-rsc.org/sites/all/files/NARDAC%20les%20neuf%20premiers%20mois-EN.pdf>).
- Kathy presented “Recording methods, transcription, and manifestation statements” at the RSC outreach event in Montreal on October 22 (available in French at <http://www.rda-rsc.org/sites/all/files/Recording%20methods%20etc-FR.pdf> and in English at <http://www.rda-rsc.org/sites/all/files/Recording%20methods%20etc-EN.pdf>).

- Kathy gave a presentation at the AMIGOS Library Service conference The Future of Cataloging: RDA, Linked Data and More on November 8, 2018 (available at: <http://www.rda-rsc.org/sites/all/files/Evolution%20of%20the%20RDA%20Toolkit%20and%20Its%20Impact%20on%20Catalogers-final-rev.pdf>).

NARDAC held its first meeting of 2019 on January 10. In the near future, we will continue to define NARDAC's possible roles, which could include volunteering and accepting assignments for post-3R work. Depending on the situation, we might handle assignments ourselves or distribute them to our constituencies based on their particular interests and/or areas of particular expertise.

RDA activities

The following report summarizes the activities of the RDA Steering Committee (RSC) from June-December 2018, primarily focusing on the RSC's October 2018 meeting in Montreal, Canada.

RSC membership and governance changes

- Gordon Dunsire's term as RSC Chair ended on December 31, 2018. Kathy Glennan succeeded him on January 1, 2019. Gordon began a two-year term as the Technical Team Liaison Officer in January.
- Dave Reser's term as a co-opted member ended in July; Bill Leonard's term as a co-opted member ended in December.
- Three RSC members renewed their terms; all will expire at the end of 2021: Renate Behrens, Europe Representative; Ebe Kartus, Wider Community Engagement Officer; Daniel Paradis, Translations Team Liaison Officer.
- In November, Gordon Dunsire, James Hennelly, and Ángela Quiroz of the RDA Board, attended a meeting in Mexico City hosted by ABINIA, a consortium of national libraries and large academic libraries in Latin America, with the goal of forming the Latin American RDA regional group.
- The RSC expects to disband the RSC working groups that have been dormant due to the 3R project. Some groups are likely to be reconstituted with new terms of reference.
- The RSC will recruit for a new Examples Editor in 2019.

3R Project Highlights

- *Beta Toolkit*

The beta Toolkit was released in June 2018 (<https://beta.rdatoolkit.org>). See [RSC/Chair/19](http://www.rda-rsc.org/sites/all/files/RSC-Chair-19.pdf) (<http://www.rda-rsc.org/sites/all/files/RSC-Chair-19.pdf>) for a description of changes associated with this rollout. Additional releases affecting content and functionality occurred in August (details at: <https://www.rdatoolkit.org/node/164>) and October (details at: <https://www.rdatoolkit.org/node/169>). The next formal release of the beta Toolkit is expected in January. While the new Toolkit remains a work in progress, the RSC and ALA Publishing welcome feedback through the "Submit Feedback" link on the site. Over 100 comments have been received to date.

- *RDA Registry*

Maintenance and support of the RDA Registry has been transferred to Dakota Systems. The work of building a new RDA Registry should be completed soon.

- *Completion of the 3R project*

The projected date for completion of the 3R project, including translations and policy statements, is December 2019.

Outreach

- The RSC held a day-long preconference on RDA at ALA Annual 2018, and is in the process of planning another day-long preconference for ALA Midwinter 2019.
- The RSC Chair gave several presentations during ALA Annual: on June 23, at the RDA Forum, and on June 25 at a meeting on “RDA and MARC 21” and at the RDA Lined Data Forum.
- A YouTube channel for RDA Toolkit was created:
<https://www.youtube.com/channel/UCd5pa3AoQlr17wESE9YHcnw>

RSC meeting, October 2018

The RSC met at McGill University in Montréal, Québec, Canada, from October 22-26, 2018. The meeting focused on the 3R Project. The outcomes from this meeting are available on the RSC website at <http://www.rda-rsc.org/sites/all/files/RSC-Outcomes-2018.pdf>.

The RSC meeting was preceded by an outreach event on October 22 at the Auditorium of the Grande Bibliothèque of the Bibliothèque et archives nationales du Québec: “The redesigned RDA Toolkit: what you need to know to get ready = Le RDA Toolkit repensé: ce qu’il faut savoir pour s’y préparer”. The recordings of the presentations (some in English, others in French) are available on the YouTube RDA Toolkit site: <https://www.youtube.com/channel/UCd5pa3AoQlr17wESE9YHcnw>. The slides of the presentations (in both English and in French) are available on the RSC website: <http://www.rda-rsc.org/node/560>.

Major topics

- *Stabilization of the English text*

Stabilizing the text of RDA is the RSC’s highest priority. The RSC developed a broad three-stage plan to achieve this goal by April 2019. The first step consists in finalizing the RDA vocabularies and element set in the RDA Registry; the second, in finalizing the instruction wording in the RDA entity and element chapters; and the third, in finalizing the guidance and resource chapters. The result will be a complete draft of the English text that will be used as the basis for translations, policy statements, RDA examples, and supplementary materials such textbooks. Minor editorial changes to the RDA text and additions of new instructions such as options will be possible after the English text is stabilized. Details on the timetable and process is available at <http://www.rda-rsc.org/sites/all/files/RSC-Chair-21.pdf>.

- *Library Reference Model (LRM) update*

Pat Riva gave a presentation on the initiative to develop LRMoo, the object-oriented version of the LRM, a model that will be in harmony with the CIDOC Conceptual Reference Model maintained by the museum community. LRMoo should not have a major impact on RDA.

- *RDA Content Discussion*

- *Aggregates*: The RSC will continue to develop the guidance chapter and refine terminology for aggregates.
- *Application profiles*: For effective use of RDA, application profiles that will communicate choices among options will need to be developed. The RSC may develop a high-level application profile based on the idea of “core” elements.
- *Minimal, effective, and coherent description*: These concepts, described in the “Resource description” guidance chapter of the beta Toolkit, have replaced those of comprehensive, analytical, and hierarchical description.
- *Non-Human personages*: The RSC is considering a high-level element to each RDA entity as a solution to the narrowed definition of Person.
- *Source of information*: Rather than stipulating an order of preference, the new Toolkit provides general instructions on source of information.
- *User tasks*: The RSC decided to remove user tasks from the Element Reference and instead to provide a guidance chapter on this topic.
- *Access points*: Access points have become RDA elements. The RSC is evaluating the proposed language and structure from Thomas Brenndorfer’s analysis of the text of the 96 new appellation elements.
- *Element labels*: The RSC will remove the term “etc.” from labels to avoid using punctuation in labels.
- *New elements*: The RSC is exploring new elements: Version, sub-types for Agent relationship elements, for diachronic works and aggregates.
- *Relationship elements*: The RSC discussed the granularity of relationship elements (relationship designators in the current Toolkit) and expressed concerns about the potential for infinite sub-typing. Treating an important but granular resource using the new aggregates approach may help solve this problem.
- *Soft deprecation of elements*: Some elements, such as “details of,” have been “soft deprecated” in the beta Toolkit. The instructions for these elements contain the text “The following option is preferred” pointing to the preferred element. The soft-deprecated elements will likely be removed sometime in the future.

- *Beta Toolkit and functions*

The RSC approved the overall design of the beta Toolkit and discussed further development of functionality. It approved enhancements to the RDA to MARC 21 mapping and the development of mappings to other schemas and ontologies.

- *RSC Communication and work process*

Major changes to the RSC’s communication and work processes will be implemented after the completion of the 3R Project. The RSC expects:

- To develop a quarterly update calendar for RDA development;
- To continue the current workflow of publishing updates to the English text of RDA Toolkit regardless of the status of associated policy statements and translations;
- To continue minor editorial changes without RSC consultation;
- To continue meeting face-to-face annually;
- To implement a collaborative online tool for asynchronous virtual meetings;
- To have regions take on projects as well as bringing forward community proposals and concerns;
- To form new working groups;
- To develop new processes for submitting changes to RDA;
- To post documents for public review;
- To commit to transparency.

Future meetings

The RSC plans to hold its 2019 meeting in Santiago, Chile, hosted by the Biblioteca del Congreso Nacional de Chile, and anticipates meeting in Jerusalem in 2020 and in Wellington, New Zealand in 2021.

RDA Board news

The copyright holders (ALA, CLFA, and CILIP) signed off on the “RDA Agreement 2018” (<http://www.rda-rsc.org/sites/all/files/RDA%20agreement%20signed%202018.pdf>), which replaces the Committee of Principals’ 1989 Agreement.