TO: Kristin Lindlan, Chair
        For distribution to ALA/ALCTS/CCS
        Committee on Cataloging: Description and Access

FR: Matthew Beacom
        ALA Representative to the JSC

RE: Report on JSC meeting, 23-25 April 2003, Washington, D.C.

Overview and summary

The Joint Steering Committee for the Revision of Anglo-American Cataloguing Rules met in Washington, DC from April 23-25, 2003. The minutes of the meeting and the JSC program of work are forthcoming.

Action items for CC:DA are in the CC:DA Program of Work, which is already on the CC:DA Web site at http://www.libraries.psu.edu/iasweb/personal/jca/ccda/pow0304.html The action items are grouped by deadline date, and CC:DA has acted on several already.

- **A New edition of AACR**
  This meeting addressed largely the ongoing work on a new edition of AACR. None of its important components is near the end of development. At this meeting the JSC took many necessary steps forward.

- **An editor**
  The JSC has agreed that an editor should be engaged to lead work on the new edition, and the JSC has recommended this to the Committee of Principals (CoP). The JSC sees the scale of the task requires an adjustment to the structure set up to update the rules. Current structures have worked well for incremental changes to the rules—even up to the scale of complete revisions of chapter 3, 9, and 12. However, developing a new edition of AACR requires a new structure. An editor is seen as a necessary "executive agent" who will be able to write and edit text as well as work with the JSC and the constituents to coordinate the development of the new edition within the traditional consensual framework that has governed the ongoing revision of AACR2.

  The CoP will discuss this at its June 2003 meeting. Such an editor, serving for a limited term, would supplement but not replace the JSC and the constituencies. Engaging an editor will greatly affect the processes by which we make the rules, the time frames in which we make the rules, and the rules themselves. For example, the JSC could move back to once a year meetings should an editor be engaged. I should be able to report further following the CoP meeting.

- **The Introductions**
  The JSC is taking a fresh look at the revision of the general and other introductions to AACR. The initial effort pursued by the JSC has not been satisfactory. This is a set back, but it is not a complete loss. The work done to date is useful, but was tied too much to using existing text. Attempting to tweak or re-write the existing texts was, I think, the best first step. However, the JSC now thinks a more thorough revision is needed. Any editor engaged to direct the new edition of AACR will be intimately involved with the writing of the new introductions. However, work on the introductions need not wait on an open—and as yet uncreated—position. Thus, Beacom and Tillett are to draft outlines for the introductions, and the *outlines* will be discussed by the JSC in Brisbane.

- **FRBR and AACR**
  Incorporating FRBR terminology and concepts into AACR progressed in important ways toward a "doable" alignment of the FRBR vocabulary and concepts with existing AACR vocabulary and concepts. In response to the latest contributions by Pat Riva and the constituents, LC provided a framework—spelled out below in the body of the report—for the constituency responses to the detailed wording and conceptual changes in the proposals. I think this framework will help us reach agreement on the details of integrating FRBR vocabulary and concepts into AACR.

  CC:DA needs to make further response to the proposals by June 30, 2003 and this will be a topic of discussion at ALA Annual in Toronto.

- **Revising chapter 21 including rule of three**
  Terms of reference for a consultant to work on revising chapter 21 will soon be ready and the Committee of Principals (CoP) will discuss the terms and the choice of a consultant at its June 2003 meeting. These terms are largely the recommendations made by Tom Delsey in his logical analysis of AACR Part II.

- **Incorporating authority control into AACR**
  To incorporate authority control into AACR, the Library of Congress will draft proposals regarding a new Part III to AACR. No timeline has been set yet, but this will be discussed further in Brisbane.

- **Consistency in Part I**
  The JSC agreed to the proposals in principle (see the section below for fuller details). JSC is interested in how far this effort can go to redesign or realign the rules in Part I so that chapter 1 is the dominant chapter—one that would be actively used by all catalogers.

  CC:DA needs to make further response to the proposals by June 30, 2003 and this will be a topic of discussion at ALA Annual in Toronto.

- **Specific characteristics of electronic resources**
  Details on this are more fully developed below in the body of the report.

  CC:DA needs to make further response to the proposals by June 30, 2003 and this will be a topic of discussion at ALA Annual in Toronto. The CC:DA response will especially address the use of conventional terminology in chapter 9, but the conventional terminology issue certainly affects other chapters as well. Specific responses on this issue for chapters 6 and 7 should be forthcoming from CC:DA as well.

- **Reconceptualizing Chapter 9**
  The JSC meeting resulted in two internal JSC documents being made available to the constituencies, and these are pertinent to the work of the ALA/BL task force on reconceptualizing Chapter 9. These documents are the Chair's paper on Class of materials concept and GMDs at http://www.nlc-bnc.ca/jsc/internal/acoc/acocrep1.pdf and Tom Delsey's commentary on that paper, which is available at http://www.nlc-bnc.ca/jsc/internal/acoc/acocrep1-chairfolup.pdf

  CC:DA needs to make further response to the proposals, and this will be a topic of discussion at ALA Annual in Toronto.

- **Format Variation**
  The JSC has asked the Format Variation Working Group to revise its proposals for chapter 25 and uniform titles to more thoroughly and explicitly articulate the use of uniform titles as FRBR expression level identifiers and to revise its initial report on form of expression identifiers and the deconstruction of GMDs to more rigorously analyze the issues and make rule revision proposals based on that re-analysis.

Many other topics were discussed and other decisions were made. Those are mentioned or detailed below.

Since specific the discussions and actions reported below generally follow the order of the meeting itself, which is not always the same as the printed agenda, in this report the agenda numbering for each of the following in noted parenthetically to aid comparisons to the printed agenda.

Agenda available online at http://www.nlc-bnc.ca/jsc/0304agen.html

OLD BUSINESS

1. **Incorporating FRBR Terminology and concepts in AACR**
    (Agenda item 3)
    4JSC/Chair/76 series; key documents: *4JSC/Chair/76/Chair follow-up/4* and responses
    Pat Riva joined the discussion by speakerphone.

The general directions expressed in *4JSC/Chair/76/Chair follow-up/4/LC response* were endorsed, and all constituencies were asked to provide responses to this document. In the brief time available, ALA has already reviewed and responded to this document in *4JSC/Chair/76/Chair follow-up/4/LC response/ALA response.*

As indicated above, the discussion concentrated on larger issues rather than on rule-by-rule or term-by-term analysis. We began by asking ourselves two questions: why we are doing this? Our answers were as expected.

We are doing this to
    a. Better meet the objectives of the catalog defined in terms of user needs
    b. Clarify concepts in the rules regarding the bibliographic entities (things and abstractions) and their relationships to one another by using more precise terms more deliberately and consistently
    c. Improve the description of the non-book resources in library collections
    d. Align the rules with contemporary rationales for bibliographic control

LC's analysis and response (*4JSC/Chair/76/Chair follow up/4/LC Response*) provided the key points for discussion and decision. These points are, in short,
    a. use "bibliographic resource" as a generic term; change definition in glossary
    b. use "expression" in place of "edition" in those cases when "edition" is used in the sense of expression, i.e. when a change has been made in the expression of the intellectual or artistic content
    c. use "manifestation" in those cases when words such as "edition" or "item" are used with the sense of "manifestation," i.e. when dealing with an attribute of a manifestation
    d. use "item" in those cases when transcribing from a copy at hand, etc.
    e. use "material" in cases when published and unpublished things meant

All constituencies agreed to respond by May 12, 2003 to *4JSC/Chair/76/Chair follow up/4/LC Response*. The constituencies then having agreed in principle, the Secretary will draft follow up *4JSC/Chair/76/Chair follow up/5* by June 30. Concurrently, LC will draft a new proposal on FRBR terms in the Appendices and Glossary by Aug. 11.

Note: Secretary will produce the follow up document rather than Pat Riva as this draft will be an editorial effort to produce a clean copy rather than a continuation of Pat Riva's

analysis. At the end of the phone call with Pat Riva, the JSC Chair thanked Pat for her work and the JSC gave a sustained round of applause.

> **ACTIONS:** Discussion of the use of FRBR terminology needs to continue. This is particularly true because LC did not provide the actual text for many of the rules listed in their document. JSC seems to have determined two different, but related, paths forward:
>
> 1. The JSC Secretary has been asked to prepare a follow-up to *4JSC/Chair/76/Chair follow-up/4* that will provide the actual texts based on the principles in the LC response and other JSC decisions. All constituents are to respond to the details contained in this document by Aug. 11, 2003 to give time for discussion at the Sept. 2003 JSC meeting.
>
> 2. The ALA/CC:DA Task Force on Consistency across Part I of AACR has been asked to incorporate texts based on the JSC decisions in their proposals. Until JSC has made definite decisions, these proposals may differ somewhat from the *Secretary follow-up* and constituency responses may wish to include comments on the use of FRBR terminology.

2. **Chapter 21; Rule revision proposals to make the "Rule of three" optional**
    (Agenda item 4)
    4JSC/ACOC/1 series (addresses optionality of the rule of three)
    4JSC/ALA Rep/1 series (draft terms of reference for thorough revision of Chapter 21, including decisions on the rule of three)

The JSC representatives discussed the existing draft of the terms of reference for the revision of Chapter 21. The discussion on the terms of reference used a document distributed at the meeting by Beacom. This will be numbered *4JSC/ALA/Rep/1/Rev*, and Beacom will send it to the JSC members by May 12. The JSC reiterated that it wants to wrap the rule of three optionality issue into a larger revision of Chapter 21. Guidance to this effect will go into the terms of reference.

> **ACTIONS:**
> - JSC representatives have informally responded to 4JSC/ALA/Rep/1/Rev by May 12.
> - Beacom will revise 4JSC/ALA/Rep/1/Rev based on the discussions at this meeting and the informal responses, and send to the Chair by May 26.
> - The Chair will distribute the terms of reference by June 9 so they can be used at the meeting of the Committee of Principles (CoP) at ALA Annual in their discussion of hiring a consultant to revise Chapter 21 per the terms of reference.

3. Proposal for the incorporation of authority control in AACR
(Agenda item 5)
4JSC/LC/54 series

At the meeting CILIP and BL expressed agreement with the general approach described in *4JSC/LC/54* (create a Part III of AACR). With this consensus of the JSC, LC will follow up with a draft of a Part III to AACR that will incorporate authority control. No date has been set. Tillett will work on a timeline in the near term and advise the JSC.

4. Multipart items in AACR2/Multipart monographs
(Agenda item 3)
4JSC/LC/51, *4JSC/LC/55*, and *4JSC/LC/56* series

On 4JSC/LC/55 the sticking point has been BL's and CILIP's view that a title heading for a multipart should be based on predominance. In this they are in harmony with the Paris Principles (11.4). Strutt reported that following long discussion at BL, BL has altered its view on the issue of predominance and BL now supports the LC proposal on removing predominance from 21.2B2 and 21.3A2. CILIP agreed with BL.

Related revision of 21.6A1 approved (do not apply to multiparts when rule of three applies).

21.2A revised (major/minor title changes) so that it does not apply to multipart monographs.

Approved rearrangement of sub-rules in 21.2 so that "major/minor" rule follows the rule for serials.

The JSC took no action on the proposal by LC to add rules to Part I explaining when and how to handle changes in data elements for a multipart monograph over time. BL and CILIP continue to have reservations about concepts and are having additional discussions.

ACTIONS:
- These revisions are intended for the 2004 update.
- LC will prepare a follow up document for the 21.2 rules (using CCC wording) by May 12.
- LC will make a proposal moving 1.0H to 1.0A by June 30.

5. Revision of General Introduction and Introductions to Parts I and II (including Principles of AACR)
(Agenda item 10)
4JSC/CILIP-BL/1 series

At this meeting the JSC representatives recorded a decision made by email to defer work on the draft Introductions. JSC had been trying to fast track this work, but that has proved untenable for a variety of reasons. Among these are the difficulty of tweaking the existing texts sufficiently to have the new conceptual introductions and still have readable texts and the impossibility of writing the introduction to a new edition before substantial and critical portions of the new edition are drafted.

Although the existing work would not be discarded, the JSC decided to take a fresh start on this issue. The next step then is for Beacom and Tillett to draft an *outline* of the new introductions; JSC representatives will review the draft outline. No date was set, but simple outline could be discussed by the JSC in Brisbane in 2003. More fully developed drafts of the Introductions may be ready by Sept. 2004, but the nature of the Introductions is such that completed versions may not be possible until after associated revisions in AACR are completed or nearly completed. Clearly now, the Introductions are not intended for any update to AACR2 but will become part of the developing AACR3.

ACTIONS:
- Beacom and Tillett to draft an *outline* of the new introductions.
- JSC representatives will review the draft outline.
- No date set, but simple outline could be discussed by the JSC in Brisbane in 2003.

6. Consistency in Part 1
(Agenda item 11)
4JSC/ALA/49, *4JSC/ALA/50*, and *4JSC/Sec/3* series

John Attig, chair of the CC:DA Task force on Consistency across Part 1 of AACR joined the discussion.

The JSC agrees with the principles behind the proposals. Discussion of minute particulars can be discussed further prior to any implementation of the proposals in the rules as that awaits a new edition. There were only a few key issues that required immediate discussion.

Among the issues discussed the "navigation" questions received considerable attention. How much of the rules should be left in each chapter when there is no difference from chapter 1? The answer affects the granularity of the internal reference structure of the rules—thus "navigation" as the label for this set of issues. The references in each chapter back to the rules in chapter 1 could be as gross as only at the ISBD area level or as fine as

at the sub-rule area. Preferences at this meeting are for ALA to move toward the grosser level of granularity in its revised proposals.

The navigation issue has another aspect than simply the mechanics of internal references. This additional aspect affects how one would actually use the rules if large portions of rules only existed in Chapter 1. It is possible that Chapter 1 would become the lead chapter for any cataloger in practice and would refer to additional chapters only for variances from the general rules. On a mechanical level, this may lead to developing "forward" references from Chapter 1 to the other chapters in Part 1.

The JSC representatives agreed that examples illustrating the application of general rules should be moved to chapter 1, and only examples illustrating special rules should remain in chapters 2-12. The decision about which examples to retain in chapter 1 should be deferred to the general review of examples for AACR3.

The discussion of *4JSC/ALA/50* (the area 3 proposals) centered on the oddities of area 3. Area three is characterized by distinct definitions of the area in the chapters that use it rather than by a set of general rules. In short, this made generalizing the rules across Part 1 for area 3 problematic.

7. Uniform Resource Names (URNs) in AACR 9.8B1 and Appendix D, Glossary and Qualification of standard numbers and/or terms of availability (1.8E)
(Agenda items 12 and 13)
4JSC/ALA/42 series (URNs) and *4JSC/BL/8* series (1.8E)

JSC constituent had responded negatively to *4JSC/ALA/42*, the ALA proposal to expand area 8 to include Universal Resource Names at the JSC meeting in York in Sept. 2002 (see Minutes M513). And the JSC had deferred discussion of the last half of *4JSC/BL/8* to consult with the ISBD Review Group (see the Minutes M520.3). John Byrum, ISBD Review Group, responded via email that the group would discuss this at the IFLA meeting in Berlin (Aug. 2003).

Discussion by the JSC representatives at this JSC meeting (Washington, DC, April 2003) explored the idea that the ISBD area 8 may not be necessary as a separate area. It was suggested that area 7 could be used for this information. Folding in the *4JSC/BL/8* and *4JSC/ALA/42* series ideas into a draft proposal would be a useful addition. JSC discussed how this action might or might not fit with ISBD harmonization. JSC concluded that making a proposal on eliminating area 8 would put the idea into the arena for wider discussion.

> **ACTIONS:**
> ▪ Beacom will draft an ALA Representative document with a rule revision proposal and justification for moving Area 8 information to area 7 by June 9. This document will include some portions of *4JSC/ALA/42* on URNs and of *4JSC/BL/8*

on qualification of standard numbers and terms of availability. The proposal could go to other constituents for comments by August 11 and discussion by JSC in Brisbane in Sept. 2003.

8. Punctuation in recording dimensions (Chapter 3)
(Agenda item 14)
4JSC/ALA/45 series
Elizabeth Mangan joined the discussion of this proposal.

JSC agreed to the proposal, but JSC preferred the CCC language and additions

ACTIONS: This is to be included in the 2004 update package.

9. Capitalisation of single letters used to represent words (Appendix A.4A1 and A.30)
(Agenda item 15)
4JSC/BL/7 series

JSC discussion indicated preferences for a proposal that excludes personal names and considers not only 1 letter prefixes such as "e" but also multiple letter prefixes such as "pc" or "net".

ACTIONS:
- BL will distribute a follow up document to their proposal that excludes personal names and considers not only 1 letter prefixes such as "e" but also multiple letter prefixes such as "pc" or "net" by June 30.
- All constituencies are to respond by Aug. 11 for discussion in Brisbane at the Sept. 2003 JSC meeting.

10. Malay names (22.27)
(Agenda item 16)
4JSC/ACOC/2 series

LC and BL responses did not agree with the ACOC proposal. Thus the proposal could not proceed. Extensive JSC discussion led to decision for ACOC to withdraw 4JSC/ACOC/2.

Note that within ALA CC:AAM did not provide input on the ALA position.

Two changes from the LC response document will enter the rules with the 2004 update package: error in one name spelling will be corrected and a footnote will be extended.

ACTIONS:
- ALA and CILIP are to respond by May 12, deferring to experts at LC and BL.
- An error in one name spelling will be corrected and a footnote will be extended for the 2004 update package.

11. Rules identified as requiring re-examination after completion of the Appendix of Major Changes
(Agenda item 14)
4JSC/Sec/4 series

ALA, BL, and CILIP had not responded by the April meeting. Discussion by JSC representatives led to tentative decision to agree with *4JSC/Sec/4/LC Response* deferring action on these rules now.

ACTIONS: ALA, BL, and CILIP are to respond by May 12.

12. JSC Web site
(Agenda item 19)

John Attig reported on the status of the JSC Web site. The internal JSC Web site has been redesigned to improve access, organization, and maintainability. Archive pages for inactive document series have been created. John hopes to wrap up his work on the Web site soon and hand over all duties to the JSC secretary.

The JSC discussed options for handling any older documents (not on the Web) that are needed for an active series. Generally, an older document is not part of an active series so there is no reason to mount or scan and mount an older document onto the JSC Web site.

ACTIONS: Secretary will set up a new password after this meeting for access to the internal JSC Web site by JSC representatives and constituencies.

13. 2003 Amendments and Index
(Agenda item 20)
4JSC/Amendments/2003

The index continues to be problematic. Examination of the index shows many things need to be fixed. Much of the problem is a gap in expectations between the authors of the rules on one hand and the indexer and publishers on the other. To address this gap and continue to build on a collaborative relationship initiated after the York meeting of the JSC and publishers in Sept. 2002, LC will provide rationales for the fixes to the index in its response.

ACTIONS: Formal responses by the national libraries, BL, LC, and NLC, to the text of the amendments are forthcoming. The responses should separately address the amendments and the index so that the text of the rules is not held up by work on the index.

14.   **Specific characteristics of electronic resources Chapter 9: Areas 3, 5, 7)**
(Agenda item 7)
4JSC/ALA/36 series

At the April 2003 JSC meeting in Washington, DC, USA, the JSC made several decisions on the proposals for specific characteristics of electronic resources. ALA was asked to prepare a revised text incorporating those decisions. The status of the chapter 9 proposals is now in a JSC document, *4JSC/ALA/36/Rev/ALA rep follow-up/2.*

That document consists of

1. Outline of the 4JSC/ALA/36 proposals. Each of the original eight recommendations is listed; under each is a list of the rules affected by that recommendation, with a brief note of actions taken at the April JSC meeting.
2. A compilation of the proposals. The proposals are given in rule number order, with both marked-up revisions and clean copy provided for each rule. The caption for each revised rule includes the recommendation(s) that that rule supports.

The following list gives the original eight recommendations in *4JSC/ALA/36/Rev*. Under each is a list of the rules affected by each, with a brief note of actions taken at the April JSC meeting.

Recommendation #1. Eliminate Area 3 for Chapter 9 and associated rules in other chapters.

0.25
1.3A
3.3 Contents
3.3A
3.3E–G
Chapter 9 Contents
9.3

Recommendation #2. Use Area 5 for type and extent of resource information.

9.5 footnote: CCC suggestion to place at 9.5A1 accepted; footnote to be deleted
9.5A1
9.5B caption: CCC suggestion to delete "(including SMDs)" rejected [not included in this document]

9.5B1: CCC response accepted, with some changes; see also recommendation #4
   below
9.*5B2*
9.5B3: CCC response accepted, with some changes
9.5B4: CCC response accepted, with "Optional addition" deleted
9.5C3: CCC response accepted, with "optionally" and last sentence deleted
A.6A

Recommendation #3. Provide a rule in Area 7 for notes on type and extent of resource.

9.7B8: ALA response accepted, with some changes
9.7B10: ALA response accepted, with some changes

Recommendation #4. Revise 9.5B1 and 9.5D1 to provide a list of SMDs containing terms
in common usage.

9.5B1: CCC response accepted; constituents are to respond with suggestions on
   which of the SMDs in the current rule should be retained in the list
9.5D1

Recommendation #5. Use Area 5 for type and extent of both content and carrier.

See Recommendation #2 above; no additional rules affected

Recommendation #6. Add an example to 9.7B11 illustrating a complex accompanying
material note.

9.7B11

Recommendation #7. Revise 1.7B17 to provide guidance on making summary notes.

1.7B17: Proposed change rejected by JSC, 9/2002
Glossary: Proposed change rejected by JSC, 9/2002

Recommendation #8. Make notes both simple and specific.

No revisions were proposed.

Particular attention is directed to decisions regarding the list of specific material
designations in rule 9.5B1. JSC agreed to include the list from *4JSC/ALA/36/Rev/ALA
rep follow-up/CCC response* (25 Oct. 2002), which consists of terms in common usage.
JSC constituents are asked to examine the list of SMDs in the current rule 9.5B1
(included with the revision of that rule given below) and to recommend which of the
terms should be retained and incorporated into the list of SMDs. Thus, the JSC decisions
on this chapter 9 issue links to similar issues for chapters 6 and 7 that are covered in the
next two items.

15. Revision of 6.5B1 to parallel the use of conventional terminology at 9.5B1
(Agenda item 8)
4JSC/CCC/6 series

The JSC representatives did not reach a consensus on this proposal, but discussion indicated that this offers a promising approach to updating the SMDs.

ACTIONS:
- CCC will present revised proposals by June 2.
- All constituencies to reply by Aug. 11.
- JSC to discuss in Sept. 2003.

16. Revision of 7.5B1 to parallel the use of conventional terminology at 9.5B1
(Agenda item 9)
4JSC/CCC/7 series

The JSC representatives did not reach a consensus on this proposal, but discussion indicated that this offers a promising approach to updating the SMDs.

ACTIONS:
- CCC will present revised proposals by June 2.
- All constituencies to reply by Aug. 11.
- JSC to discuss in Sept. 2003.

EXECUTIVE SESSION

17. JSC Strategic Plan
(Agenda item 18)

Minor changes in text suggested in discussion of response by Committee of Principals (CoP). JSC discussed importance of posting plan to JSC Web site and the usefulness of a public strategic plan to organize public access to information regarding JSC actions on AACR initiatives.

ACTIONS: Pending CoP approval, Secretary to post the strategic plan to the JSC public Web site.

18.   Communication regarding revision of AACR
       (Agenda item 26)

Beacom reported on his impressions from the ALA midwinter meeting in Philadelphia regarding the response of the members of the ALA constituency to coming changes in AACR, e.g. FRBRization, new conceptual introductions, re-thinking of chapter 9, a new part 3 for authority control, etc. He noted there is a need for JSC and the representatives to provide constituents with the context for the change to a new edition. To this end, CC:DA has put up a document titled *The Future of AACR*, and CC:DA will continue to report on AACR developments. Chair and Secretary will work to provide more contextualizing information on the JSC Web site. The publication of the JSC strategic plan is essential to any and all attempts to openly communicate with the AACR communities.

19.   Communication with other resource description communities
       (Agenda item 21)

Huthwaite and Tillett reported on several engagements with other resource description communities via meetings with other national bibliographic agencies, translation work, and IFLA initiatives such as FRANAR, FRBR, the meeting of experts on an international code, etc. JSC discussed its continuing efforts to coordinate its work with that of the ISBD review groups.

20.   IFLA Meeting of Experts on an International Cataloging Code
       (Agenda item 22)

Tillett reported on status of work on the IFLA Meeting of Experts on an International Cataloging Code planned for July 2003 in Frankfurt, Germany (and two subsequent pre-IFLA conference meetings). The Frankfurt meeting will include about 50 experts from European national libraries and rule making committees. The arrangements for the meeting are similar to those for the JSC's international conference on the future of AACR held in Toronto in 1997. The meeting is invitational, but much of the discussion will be open to the public through a Web site. Topical sub-groups will discuss papers presented for each topic ahead of the meeting. The Web site for the meeting is:
http://www.ddb.de/news/ifla_conf_index.htm

The purpose of the IFLA meeting of cataloging experts is to review the Paris Principles and resulting cataloguing codes to update them so the codes might be in greater harmony, particularly in the area of access and authority control, we may increase our ability to share cataloguing information worldwide by promoting standards for the content of bibliographic and authority records used in library catalogs. The meetings are grounded in emerging ideas: a new view of IFLA's "Universal Bibliographic Control" that retains the principles of sharing cataloguing information yet puts the user first, recognizing that

we have different languages, scripts, and cultural needs for our users and the FRBR work that has given us new vocabulary and conceptual models to help promote more global understanding.

> **ACTIONS:** Several of the JSC representatives will be attending the meeting. All will participate in the pre-meeting online discussions.

21. Report of the Committee of Principals meeting held 13-14 September 2002 in York
(Agenda item 23)

The Chair reported on the meeting of the CoP. Key topics were the "new edition" of AACR and the status of the strategic plan.

22. Liaison with the co-publishers of AACR (including Infobase for AACR, Concise AACR, Web version of AACR, Information on purchasing the printed AACR for the JSC Web site)
(Agenda item 24)

The Chair reported on several topics of relating to the interactions among the JSC and the co-publishers. ALA Publishing is working on an "Infobase" of AACR that would facilitate editorial work by the JSC and constituencies. ALA Publishing's plans for the Concise AACR were discussed. The idea of a Web version of AACR is being explored. Chair and Beacom will draft a functional analysis for discussion by JSC in Brisbane in Sept. 2003. Providing information on purchasing the printed AACR from the JSC Web site is tied to the development of an AACR Web page.

23. Future arrangements for reviewing and editing AACR
(Agenda item 25)

The JSC discussed arrangements for managing the transition to a new edition of AACR. The JSC and constituencies are well-suited to supported ongoing, incremental revision, but are not ideally suited to implementing a new edition, an AACR3. Other possible arrangements were discussed. All representatives thought a single editor working with the JSC and constituencies would be ideal. This idea will be discussed with the Committee of Principals (CoP) when they meet next in June 2003.

24. Formal recognition of individuals and groups contributing to the development of AACR
(Agenda item 27)

JSC discussed drafts of a certificate to formally recognize groups and individuals who contribute to the development of AACR.

25. Next Chair of JSC
(Agenda item 28)

JSC discussed election of the next Chair. Ann Huthwaite, the current Chair, ends her term at the Sept. 2003 JSC meeting in Brisbane. The election will take place then.

26. Class of materials Concept and GMDs
(Agenda item 29)

JSC discussed Huthwaite's discussion paper on the class of materials concept and GMDs and Tom Delsey's response to Huthwaite's paper. The consensus of the group was that these documents would be valuable background papers for the constituencies and for working groups or consultants.

> **ACTIONS:** Huthwaite will post her paper as an ACOC Rep document in May. Pending Delsey's approval, his response will be posted to the JSC Web site as a Chair follow up document.

End of Executive Session

27. JSC Format Variation Working Group (including Recommendations Concerning Revision of Rule 0.24) and Class of materials concept and GMDs
(Agenda item 30)
4JSC/Chair/71 series, *4JSC/Chair/72* series, *4JSC/Chair/73* series, and *4JSC/ALA/30* series
Jennifer Bowen, Chair of the Format Variation Working Group joined the meeting.

The discussion concentrated on the group's work on rules in chapter 25 to accommodate FRBR expression level collocation using uniform titles and its work on deconstructing the GMD and developing form of expression identifiers. Bowen emphasized the preliminary nature of the proposals for chapter 25 in *4JSC/Chair/71/Rev/Chair follow-up/4* and the discussion paper on GMDs and an identifier for the form of expression in *4JSC/Chair/71/Rev/2/Chair follow-up.*

Chapter 25
JSC responses raised many questions about both the general approach taken and many particulars in the proposal. Overall, the JSC concluded that it was a useful and necessary exercise for the FVWG and the JSC constituencies to take initially a fairly minimalist revision (as the ALA response called it) of chapter 25. However, it is clear to the JSC and its constituents that much more is needed. Thus the JSC has asked the FVWG to take a "fresh look" at the chapter, rather than trying to work primarily with what is already there. The JSC asked the FVWG to attempt at redesign of the whole chapter.

Some specific guidance from the JSC to the FVWG included the following.
- Discuss the different functions of uniform titles in an introductory section. Start with the identification function so collocation and differentiation logically follow. Clearly explain the concepts.
- Totally rewrite 25.1A. Delineate situations where uniform titles are useful, the objectives behind using them, etc.
- Rename and relocate and re-explain collective uniform titles.
- For expressions, identify the types of expressions that are bibliographically significant (such as translations, revised editions, performances, etc.) and organize the rules according to the relationships, rather than the type of the addition to the heading (e.g. translation vs. "add the language.")
- Drop information about manifestation-level additions to the heading.
- In the guidance for determining a new expression, don't require a new record for every new manifestation (as the proposed text did).

Form of Expression and GMD
The JSC discussed the document on form of expression and GMD thoroughly.

JSC discussion centered upon clearly distinguishing between the analysis that is needed to deconstruct the GMD, etc. and the synthesis needed to propose rules for the description. This was unclear in the FVWG document. The FVWG will further define the objective that it is trying to achieve by coding the mode of expression in the record. The JSC asked the FVWG to continue thinking through the *function* or hoped-for function of the GMD, especially the early-warning aspect, and think of ways to achieve this functionality—if it thinks it desirable—in other ways. For the analysis, the FVWG will develop a more rigorous taxonomy of terms for mode of expression and ensure that the terms are at an appropriate level of specificity for the user community. These terms need not be user friendly as they are for analysis and not for display. Once the analysis is done, the FVWG will work on display terms for mode of expression that would actually be useful to users.

The JSC also suggested that if the FVWG felt a new area was needed for the form of expression identifier or the GMD, the definition of a new area between Areas 2 and 4, but should not use Area 3 as a location for this information since that would complicate an already troublesome area. The FVWG needs to consider the issue of mixed media, where multiple GMDs might be appropriate and useful. The JSC preferred the use of the

phrase "mode of expression" instead of "form of expression" as it seemed less likely to lead to confusion between "form" of expression and format of expression.

ACTIONS:
- FVWG will draft brief report to update MARBI at ALA Annual. This will not be a MARBI discussion paper.
- FVWG will draft an interim report for the JSC by Aug. 11. to address each item in its Terms of Reference and respond to it.
- FVWG will draft a new outline for the entire chapter and submit it by August 11th so that the JSC can review it before their fall meeting (this won't go out to the constituencies yet).
- FVWG will draft another status report on this issue by August 11th as a step toward rule revision proposals.

NEW BUSINESS

28. AACR Glossary
(Agenda item 31)
4JSC/Sec/5 series

JSC approved.

ACTIONS: This will be part of the 2004 amendments package.

29. "Considered to be important"
(Agenda item 32)
4JSC/Sec/6 series

The JSC discussed ALA's suggestion of a fuller, ISBD-inspired phrasing and determined that the briefer statement would be better in the text of rules than the more cumbersome ALA suggestion of "if necessary for identification or otherwise considered important to users of the catalogue." It was noted that the fuller meaning of the phrase and the connection to the needs of the users would be brought out in the introduction.

ACTIONS:
- Secretary will revise proposal to incorporate CCC wording by Aug. 11. The change would become part of the new edition of AACR per the ACOC suggestion.
- Chair will communicate with the ISBD Review Group regarding this JSC decision.

30. Punctuation in language examples
(Agenda item 33)
4JSC/Sec/7 series

JSC agrees with the recommended changes identified in 4JSC/Sec/7 document and further agrees that these changes should be postponed until the next edition of AACR. CCC noted that changes should also be made in 4.7B2 and 5.7B2.

ACTIONS: Secretary will revise by Aug. 11 for discussion by JSC in Brisbane.

31. Inaccuracies (1.0F1)
(Agenda item 34)
4JSC/LC/57 series

JSC approved this proposal to replace the second example in rule 1.0F1 because it is a serial. ALA retracted its suggestion to substitute "continuing" for "serials and integrating."

32. Transcription of series title (1.6B1 and 1.0F1)
(Agenda item 35)
4JSC/LC/58 series

Judy Kuhagen of the Library of Congress joined the discussion. LC offered a revised approach at the meeting. JSC agreed with the LC revised proposal that transcription is of primary importance in the series area and so the see also reference from rule 1.6B1 to the 12.1B rules for transcription of the title proper for the serial or integrating resource as a whole will be deleted from the rules.

ACTIONS: LC has prepared a follow up document for discussion by constituents in time for decision at the JSC meeting in Brisbane.

33. Correction of example in rule 3.1F1
(Agenda item 36)
4JSC/ALA/47 series

JSC agreed to the proposed correction.

ACTIONS: This change will become part of the 2004 amendments package.

34.   Additional example in rule 3.5B3
(Agenda item 37)
4JSC/ALA/48 series

JSC agreed to the proposed additional example.

   ACTIONS: This change will become part of the 2004 amendments package.

35.   Definition of "Main entry" in AACR Glossary
(Agenda item 38)
4JSC/CCC/9 series

JSC decided that work on this revision should be deferred. A consensus to defer developed as JSC discussed the ALA suggestion that AACR communities and JSC should re-think the whole cluster of related terms and concepts and offer a more complete proposal in conjunction with the new the introduction and the revision of chapter 21.

36.   Next meeting

The next meeting of the JSC will be on Sept. 8-10 in Brisbane, Australia.