RDA: Revising, Developing and Assessing
or, How the Instructions Evolve

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Outline of Today’s Webinar

• Background: JSC, its constituencies and how ALA fits in

• Making changes to RDA & to LC-PCC Policy Statements
  • Examples

• RDA changes coming in April

• Topics the JSC will likely consider this year
Get Your Scorecard: JSC

- Joint Steering Committee for Development of RDA
  - Seven constituencies, plus Chair and Secretary
  - Forms working groups as needed to focus on special topics
    - Ongoing: examples, music
    - Newly formed: places, RDA/ONIX Framework, technical issues
  - Meets in person once a year to consider formal proposals and discussion papers
  - Conducts other business virtually (email, conference calls, etc.) throughout the year
JSC Members, Nov. 2013
Get Your Scorecard: External Groups

- External groups may provide proposals and discussion papers to the JSC
  - EURIG – European RDA Interest Group
  - IAML – International Association of Music Libraries, Archives and Music Documentation Centres
  - IFLA ISBD Review Group
  - ISSN International Centre
Getting Proposals to the JSC

Constituencies
ACOC
ALA
BL
CCC
CILIP
DNB
LC

JSC Working Groups
Examples
Music
Places

External Groups
EURIG
ISBD Review Group
ISSN International Centre
IAML
The Home Team: ALA

• Within ALA’s organization – ALCTS
  • CC:DA – Committee on Cataloging: Description and Access: for descriptive issues
    • Voting members and liaisons representing both internal and external organizations
  • SAC – Subject Analysis Committee: for subject issues
    • Includes separate SAC-RDA Subcommittee

• External to ALA
  • Program for Cooperative Cataloging (PCC)
    • Standing Committee on Standards
    • Task Groups formed by PCC to focus on specific issues
Getting Issues to ALA Representative

CC:DA task forces make proposals

CC:DA constituents make proposals

CC:DA creates and/or approves proposals and discussion papers relating to description

SAC-RDA Subcommittee makes proposals

SAC approves proposals and discussion papers relating to subject analysis

Other individuals or groups make suggestions

ALA JSC rep.
The Playbook

• Where should changes take place?
  • RDA itself
  • LC-PCC Policy Statements
  • Best practice documents
  • Local (institutional) policies

• Or just use cataloger’s judgment?
The Regulations: RDA

- Changes may occur in RDA text, glossary, mappings, registered vocabularies, etc.
  - Completely new content
  - Revised content
  - Deleted content

- Two processes
  - Detailed proposals
    - Incorporated once a year into RDA Toolkit (typically April)
  - “Fast track” changes
    - Incorporated up to four times/year in the Toolkit
RDA Instructions Changed in 2013

- 214 changes from JSC 2012 meeting
- + 76 fast track changes

- July 290
- May 175
- November 170

Fast track changes

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The Interpretations:
LC-PCC Policy Statements

- Provide more specific guidance and examples than in the RDA text
  - Some based on LCRIs, but reevaluated in the new context
  - Some new for RDA

- Continually evolving
  - With oversight by the PCC Standing Committee on Standards
  - Suggestions from PCC and beyond

- Creating/modifying these policy statements can be an interim step to changing RDA itself

- Changes published in Toolkit approximately 4 times/year
LC PCC PSs Changed in 2013

- May: 80
- July: 80
- November: 80

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More Interpretations: Best Practices/Guidelines

- Developed by specialist communities
  - Music Library Association
  - ACRL’s Rare Books and Manuscript Section
  - Online Audiovisual Catalogers

- Nature of guidelines and dissemination take different forms
  - Documents on a single topic vs. comprehensive guidelines
  - Websites now – Toolkit later?
Your Interpretations: Local Policies

- Up to you and/or your institution
  - Go beyond core?
  - Always provide access points for institutional authors?

- Updated/created as you see the need

- Can be included in Toolkit for your institution, or can share even more broadly
  - The British Library Guide to RDA Name Authority Records
  - RDA Toolkit / Tools Tab / Workflows / Global Workflows
ISSNs from any source? – RDA 2.12.8 (ISSN of Series) & RDA 2.12.16 (ISSN of Subseries)

- Early 2012: PCC task group identified issue
- March/April 2012: Fast track submitted; proposal requested; formal proposal drafted
- May 2012: CC:DA approved proposal
- Nov. 2012: JSC discussion, revision, & approval
- July 2013: Published in Toolkit
Complex Idea and Fix

Modifying Basis for Identification of the Resource –
RDA 2.1.2.2 (Resource Issued as a Single Unit) &
RDA 2.1.2.3 (Resource Issued in More Than One Part)

• ALA proposed correcting instructions to:
  • Prefer a collective title when available
  • Use a predominant work to represent the resource as a whole
  • Clarify instructions for resources issued in more than one part
Complex Idea and Fix: Timeline

Modifying Basis for Identification of the Resource

- Sept. 2011: CC:DA Task Force appointed
- June 2012: CC:DA report and discussion
- Aug. 2012: Proposal finalized and sent to JSC
- Nov. 2012: JSC discussion, revision and approval
- July 2013: Published in Toolkit
LC-PCC PS Fix: Timeline

*Number, Date, and Location of a Conference, Etc. – 11.13.1.8*

**April 2012**
- PCC task group: Need for instructions for both ongoing & individual instances of conferences

**Summer 2012**
- PCC Standing Committee on Standards: Refined and approved final wording

**May 2013**
- Published in Toolkit as official LC-PCC Policy Statement
Questions?
RDA Additions
Coming in April

• New element
  • *Language of the Family* (will be 10.8)
    • Subsequent Chapter 10 instructions will be renumbered

• New element sub-type
  • *Period of Activity of the Corporate Body* (will be 11.4.5)
    • May also be used in access points to distinguish one body from another
RDA Significant Changes Coming in April

• Treaties:
  • Record the title of the treaty as the preferred title for all treaties
  • Use the title of the treaty as the basis for the authorized access point
  • Broaden the definition of RDA *Date of a Treaty* (6.20.3) to include the date of adoption
  • *Participant in a Treaty* (formerly *Signatory to a Treaty*) moved from Chapter 6 to Chapter 19, since it signifies a relationship
RDA Significant Changes
Coming in April

- **Medium of performance**
  - Move restrictions on recording data currently contained in *Medium of Performance* (6.15) to *Additions to Access Points Representing Musical Works with Titles That Are Not Distinctive* (6.28.1.9)
  - May record more medium of performance information, such as doubling or alternative instruments
  - Remove terminology used to record “standard combinations of instruments”
  - Instead record each individual instrument
RDA Changes
Coming in April

• Restructuring/clarifying – Core elements:
  • General (0.6.1) – added the following:
    • Only one instance of a core element is required. Subsequent instances are optional.
  • Added language affirms that RDA does not require an “all-or-nothing” approach to recording additional instances of a given element

Must record: London
May also record: New York
RDA Changes
Coming in April

- Restructuring/clarifying – Part titles, etc.
  - *Titles of Parts, Sections, and Supplements* (2.3.1.7)
    - Rewritten to clarify when to include the common title
      - If not on the source of information – omit
      - If on the source of information, but the part title is sufficient to identify the resource – omit
    - Otherwise include
  - *Collective Title and Titles of Individual Contents* (2.3.2.6)
    - Added specific sub-instructions for comprehensive and analytical descriptions
RDA Changes
Coming in April

- Restructuring/clarifying – Recording dates in more than one calendar
  - Added instructions to:
    - Recording Date of Production (2.7.6.3)
    - Recording Date of Publication (2.8.6.3)
    - Recording Date of Distribution (2.9.6.3)
    - Recording Date of Manufacture (2.10.6.3)
    - Recording Copyright Dates (2.11.1.3)
  - Also adjusted related core element requirements
    - Only one such date is core, in the calendar preferred by the cataloging agency
RDA Changes
Coming in April

• Restructuring/clarifying – Note on manifestation/item
  • *Note on Manifestation or Item* (currently 2.20)
    will become:
    • *Note on Manifestation* (2.17)
    • *Note on Item* (2.21)
  • *Item-Specific Carrier Characteristic* (currently 3.21) &
    *Note on Manifestation or Item* (currently 3.22)
    will be transformed to:
    • *Note on Carrier* (3.21)
    • *Note on Item-Specific Carrier Characteristic* (3.22)
RDA Changes Coming in April

- Restructuring/clarifying – Music instructions
  - Clarified treatment of suites
    - *Two or More Parts* (6.14.2.7.2, Alternative)
    - *Two or More Parts* (6.28.2.3, Exception)
  - *Preferred Title Consisting Solely of the Name of One Type of Composition* (6.14.2.5)
    - Added sub-instructions for choice of language and singular or plural form
      - Including using cognate forms
RDA Changes
Coming in April

• Restructuring/clarifying – Liturgical works
  • *General Instructions on Liturgical Works* (6.30.1.5)
    • Restructure to more clearly indicate the types of liturgical works that are covered by the instruction
    • Move content of former 6.30.1.5.4 and 6.30.1.5.5 into earlier instructions
RDA Changes Coming in April

• Restructuring/clarifying – Personal names
  • Extend core element statement in Other Designation Associated with the Person (9.6) to include:
    • a person named in a sacred scripture or an apocryphal book, a fictitious or legendary person, a real non-human entity
  • Revise General Guidelines on Constructing Authorized Access Points to Represent Persons (9.19.1.1) & Title or Other Designation Associated with the Person (9.19.1.2) to clarify the order of these elements when constructing access points

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RDA Changes
Coming in April

• Restructuring/clarifying – Corporate bodies
  • *Names Not Conveying the Idea of a Corporate Body* (11.7.1.4) will become:
    • *Type of Corporate Body*
  • *Addition to a Name Not Conveying the Idea of a Corporate Body* (11.13.1.2) will become:
    • *Type of Corporate Body*
  • Examples also added to *Type of Jurisdiction* (11.7.1.5) and *Other Designation* (11.7.1.6)

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RDA Changes Coming in April

• Restructuring/clarifying – Conferences
  • *Access Point for a Series of Conferences, Etc.* (11.13.1.8.2)
    • If the access point represents a series of conferences, do not add the number, date, or location of the conferences

• Restructuring/clarifying – Relationship designators
  • Relationship designators merged (Appendix I.3.1):
    • *Editor of compilation* removed; definition combined with *Editor*

**DO NOT APPLY UNTIL PUBLISHED!**
Beyond April…

- Expected in time for the 2014 JSC meeting
  - Proposals/discussion papers arising from ALA – principally via CC:DA
    - *Statement of Responsibility* versus *Performer, Narrator and/or Presenter* and *Artistic and/or Technical Credits* (Chapters 2 & 7)
    - Machine-actionable data elements (chiefly Chapter 3)
    - Create a new element, *Extent of Expression*
    - Create a new element, *Subject of a Work*
    - Improve instructions for describing relationships (Chapters 24-28)
    - Expand relationship designators in *Appendix K*
Beyond April...

- Expected in time for the 2014 JSC meeting
  - Proposals and discussion papers from other JSC constituencies addressing:
    - Compilations
    - Naming parts of the Bible
    - Choreographic works
  - Proposals and discussion papers from several of the JSC Working Groups
    - Transfer instructions relating to names of jurisdictions from Chapter 16 to Chapter 11
    - More changes related to music
Staying Informed

- CC:DA activities:
  - CC:DA blog - [http://alcts.ala.org/ccdablog/](http://alcts.ala.org/ccdablog/)

- JSC activities:
  - JSC website: [http://www.rda-jsc.org](http://www.rda-jsc.org), especially the News and Announcements and Working Documents pages
  - Various announcements on RDA-L – Subscribe at: [http://lists.ala.org/sympa/info/rda-l](http://lists.ala.org/sympa/info/rda-l)

- Changes to LC-PCC Policy Statements:
  - [http://www.loc.gov/aba/rda/lcps_access.html](http://www.loc.gov/aba/rda/lcps_access.html)
Questions?

• We have time to take some now

• After the webinar, contact me at:
  • kglennan@umd.edu
Upcoming ALCTS CE Opportunities

Check the ALCTS website for links to all upcoming events

http://www.ala.org/alcts/confevents

Send ideas and suggestions: Felicity Dykas, dykasf@Missouri.edu
Upcoming ALCTS CE Opportunities

Cataloging webinars:

March 19  RDA: Staff Training, Implementation, and Monographic Workflow
April 4    Comprendiendo las RDA de forma fácil
April 16   RDA and music resources (planned)
# Upcoming ALCTS CE Opportunities

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And more:

http://www.al.org/alcts/confevents/upcoming/webinar
Upcoming ALCTS CE Opportunities

E-Forums:

March  Linked Data
April  Shared Print Repositories

Sign up:

http://www.ala.org/alcts/confevents/upcoming/e-forum/sympa
Upcoming ALCTS CE Opportunities

Web Courses:

Fundamentals of …

Acquisitions

Collection Development and Management

Preservation

Electronic Resources Acquisitions

Collection Assessment

A cataloging course will be available this spring.

More information:

http://www.ala.org/alcts/confevents/upcoming/webcourse