RDA Updates, *March 2022-March 2023*

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Agenda

- RDA updates
  - New RSC documents; new RDA working groups
  - RDA/MARC WG
- Official RDA Toolkit
  - RDA: Entities and Guidance
  - Updated community resources and documents
- Community update:
  - PCC, NARDAC and Asia
- Welcome CEAL to participate

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New RDA documents

- [Proposal for correction of the narrower element hierarchy in Manifestation: manufacturer agent (etc.) and its inverses](#) (July 2022)
  - Corrects the narrower element hierarchy for 8 elements
- [Proposal to improve consistency in "supertype" elements](#) (July 2022)
  - Changes to ten elements to improve consistency and increase clarity and one change to the Registry to correct a missing narrower element
- [Proposal to amend and clarify instructions in Manifestation "place of" elements](#) [approved with amendments; implemented in the December 2022 release]
  - Adds the missing instructions and new subheads within each file is also recommended for clarity and to improve findability.

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New RDA documents (2)

- Proposal to adjust instructions in four "restriction on" elements in Manifestation and Item [approved; implemented in the December 2022 release]
  - Instructions added to two Item and two Manifestation elements to make them consistent with other RDA elements that permit recording methods for non-RDA vocabulary encoding schemes
- Suggested proposal to correct the terms "multipart monograph" and "serial" [rejected]
  - The terms "multipart monograph" and "serial" are cross references in RDA to the preferred terms "multiple unit" and "serial work." Yet there are a number of instances of the term "multipart monograph" and "serial" that appear in RDA text, all of which should be re-worded to the preferred terms for consistency of terminology and to correct the mistaken impression that legacy terms are still used. This proposal is replacing the term "part" with "unit" in these elements.

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New RDA documents (3)

- [Report on Approaches to Teaching RDA in the LIS Classroom](#) (Elisa Sze, RDA Education and Orientation Officer)
  - Support for educators
  - Teaching foundational concepts and terminology & navigation
  - Entity and element pages
  - Role of guidance chapters
    - Determining an order for novice learners
      - Table 1 (next slide)

Table 1. Sample order of guidance chapters for student cataloguers

Guidance chapters to assign to students	When to introduce the guidance

• Introduction to RDA
   o Objectives and principles governing RDA
   o Standards related to RDA
   o Data elements
• Application profiles
• User tasks
	At the start of the course unit on RDA, to explain how RDA implements LRM, and to ease students into reading RDA text.

• Terminology
• Well-formed RDA
• Resource description
   o Coherent description of an information resource
   o Minimum description of a resource entity
   o Effective description
• Data provenance
• RDA implementation scenarios
• Nomens and appellations
• Recording methods
• Transcription guidelines
   o Guidelines on basic transcription
   o Guidelines on normalized transcription
• Manifestation statements
	When entities and elements have been introduced, and prior to students creating RDA data on their own.

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Guidance chapters to assign to students	When to introduce the guidance

• Aggregates
• Resource description
  ○ Describing a work, specifically the section "Describing aggregating works and works that are aggregated"
  ○ Describing an expression, specifically the section "Describing expressions of aggregating works and expressions that are aggregated"
  ○ Describing a manifestation, specifically the section "Describing a manifestation that embodies two or more expressions"
	When description of manifestations embodying a single expression has been mastered, and students move to the concept of aggregates.

• Diachronic works
• Resource description
  ○ Describing a work, specifically the sections "Describing a diachronic work" and "Describing an integrating work"
  ○ Describing an expression, specifically the section "Describing an expression of a diachronic work"
  ○ Describing a manifestation, specifically the section "Describing a manifestation of a diachronic work"
	When students are introduced to the concept of diachronic works.

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RDA Working Groups, 2022-2023

- Extent Working Group
  - Improve the RDA standard for elements that use measurements, primarily extent and dimensions elements
- Official Languages Working Group
  - Examine the concept of "official language" for corporate bodies in RDA
- Place/Jurisdiction Working Group
  - Examine the concepts of place and jurisdiction (corporate body) and their associated definitions and instructions in RDA
- Religions in RDA Working Group
  - Expand the non-Christian coverage in RDA
  - Western and Christian bias in the 3R Toolkit report (2019)

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RDA Working Groups *(2)*

- [Religions in RDA Working Group](#), 2022-2023
  - RSC supported the direction of generalizing instructions to remove Western/Christian/Anglocentric bias.
  - Group discussions with the perspectives of Judaism, Buddhism, Hinduism …
    - Remove the section of Catholic titles
    - Have a single section for persons of religious vocation
    - Make the Toolkit easier to use
      - Currently, the instructions require the cataloger to decide if the relevant title is similar to a Bishop, which is itself Christian bias.
    - Discussions including non-Christian's perspectives, e.g.
      - "The more appropriate language would simply be "sacred texts" as the word "scripture" does not really apply to Eastern or Nature-based traditions. For example, in Buddhism, sacred texts are most frequently called "Sutras" and in Hinduism, "Vedas," etc."

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RDA Registry

- Linked data and Semantic Web representations of the entities, elements, and terminologies approved by the RDA Steering Committee
- Provides the same content as RDA Vocabularies, but presented with context and aimed at developers of applications using RDA
- Is the endpoint of RDA IRI de-referencing for elements and concepts

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RDA Maps: Maps for use with RDA vocabularies

- MARC 21 formats

  - Map from RDA properties to MARC 21 Bibliographic encodings

  - Map from RDA properties to MARC 21 Authority encodings

- IFLA LRM: RDA classes to LRM; RDA properties to LRM

- Map from RDA properties to Dublin Core Terms

- Map from unconstrained properties to MARC Code List for Relators

- Map from RDA properties to unconstrained properties

- Map from canonical to lexical URIs in the RDA element sets

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MARC/RDA Working Group

- [Final Report of the MARC/RDA Working Group](#) (2022)
  - Completed papers: 8 proposals + 8 discussion papers
  - MRWG chose not to pursue changes in relation to other RDA extensions.

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Official RDA Toolkit

- Both global vs. local considerations (Glocalization)
  - Official RDA is an international standard with Options which may be governed by policy statements or application profiles provided by cataloging agencies.
- RDA supports linked data
  - An Entity & relationship model (based on IFLA LRM)
    - Entities are described using elements
  - RDA Toolkit: entities, elements, vocabularies, guidances and instructions
  - RDA Registry: linked data and Semantic Web representations of the elements (open access)

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- Profile features are in the dark blue bar
  - Original Toolkit, Help, Language of text and/or site (here English) and Feedback form
- Content tabs in the lighter blue bar
  - Entities, Guidance, Policies and Resources
  - Obtain links and citation numbers to specific parts of instructions when highlighting text

Entities

- Based on IFLA Library Reference Model (LRM) entities
- Separate pages for each
- Related elements linked at the bottom of each page

ENTITIES

RDA Entity
Work
Expression
Manifestation
Item
Agent
Person
Collective Agent
Corporate Body
Family
Nomen
Place
Timespan

elements

○ All ○ Attribute Elements ○ Relationship Elements ⌄

Find Element

abridged as work →
abridgement of work →
absorbed by work →
absorbed in part by work →
absorption in part of work →
absorption of work →

RDA
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Structure of Element Pages

- Name of element
- Definition and scope
  - Element reference
- Prerecording
  - This element may refer to …
- Recording
  - Four recording methods
- Related elements, as applicable: Broader, Narrower, Inverse

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Guidance

- Topical approach

  - Separate from instructions

  - For background information, new concepts, and instructions that apply to more than one element

- May be referenced in the element pages

  - Entities → Manifestation → Recording → **Describing a manifestation** (linked to Guidance → Resource description)

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Community guidance & resources

- In RDA
  - Policy statements
    - Decisions for a cataloging agency or community
  - Community resources
    - Community-specific guidance not in the above
  - Documents
    - User-created documentation
    - Can be used privately or shared locally or globally
- Outside RDA
  - Application profile
  - LC-PCC Metadata Guidance Documentation
    - With examples in MARC and BIBFRAME

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Policies

- Currently 4 PS posted in draft form
- Also access through PS set selection menu

| POLICIES | RESOURCES | All ⌄ |

BLPS
LC-PCC PS
MLA BP
NLNZ PS

LC-PCC PS Entities
LC-PCC PS Guidance
LC-PCC PS Community Resources

Guidance > Resource description > Describing a work

Describing a work

Table of contents

- Relating a work to associated expressions, manifestations, agents, places, and timespans →

Select Policy Statement Set (2)

LC-PCC PS (37) ⌄

Show None
BLPS (37)
LC-PCC PS (37)
MLA BP (0)
NLNZ PS (0)

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CONDITION OPTION

Record information about one or more agents using Work: note on work ⊕.

LC-PCC

Send to Back

LC/PCC practice: Cataloger's judgment.

CONDITION OPTION

Relate a work to an agent using Work: creator agent of work ⊕.

LC-PCC

Send to Back

LC/PCC practice: Cataloger's judgment. See Metadata Guidance documents for LC/PCC requirements for recording certain categories of relationship elements in metadata description sets.

CONDITION

A work is associated with one or more places.

CONDITION OPTION

Record information about one or more places using Work: note on work ⊕.

LC-PCC

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LC/PCC practice: Cataloger's judgment.

CONDITION OPTION

Relate a work to a place using Work: related place of work ⊕.

LC-PCC

Send to Back

LC/PCC practice: Cataloger's judgment. See Metadata Guidance documents for LC/PCC requirements for recording certain categories of relationship elements in metadata description sets.

CONDITION

A work is associated with one or more timespans.

RDA Toolkit + related LC-PCC PS + notes about Metadata Guidance documents

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Resources

- Community resources
- What is in Community Resources?
    - Deprecated elements
    - String encoding scheme instructions
    - Access point and normalization instructions by language

Community Resources (CR)

- As a home for RDA instructions deemed inconsistent with RDA's international commitment, but still of significant value to the Toolkit community.
- CR should be open to a wider audience of contributors.
- Goals
  - Available to all interested communities of RDA Toolkit subscribers.
  - Make full use of existing Toolkit technology and capabilities.
  - Contributors will have responsibility for the development & maintenance of content.
  - CR content will be searchable and easily identified as CR content in search results.

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Community update:

PCC RDA Test, NARDAC & RSC Outreach in Asia

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PCC RDA Test

- PCC RDA Communications Committee
  - Feedback Form; Public Tracking Spreadsheet
  - PCC RDA Communications Bulletins (quarterly)
- PCC Task Group to Test the Official RDA Toolkit (charge, Feb. 2022)
- Test
  - Official RDA Toolkit, LC-PCC Policy Statement & LC-PCC RDA Narrative Metadata Guidance Documentation
  - Report on 2/23/23

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PCC RDA Test (2)

- Expected timeline
  - June:
    - The analysis of test results will be completed by early June.
    - Invited to discuss at the June Policy Committee meeting
    - Share report and recommendations with PCC
  - June-October:
    - Update LC-PCC PS and Metadata Guidance Documentation
- The Task Group is developing training the Official RDA Toolkit.
  - Training for monographs and e-books are coming up.
- PCC won't implement before June 2023.

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Legacy Community Resources content in the Official RDA Toolkit

- Community resources in the Official RDA Toolkit
- Examples:
  - Capitalization instructions for various situations (especially in English)
  - Abbreviation instructions
- In November 2022, the PCC Policy Committee voted to endorse the 2nd option: incorporating the content into the Metadata Guidance Documentation (MGDs) and LC/PCC would control text and update cycle. Option 1 is working with the English-speaking world committee.

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Policies

LC-PCC PS Community Resources

Click on the active links to browse LC-PCC Policy Statements by topic. A grayed out link means that there are no policy statements for that topic.

- Community vocabularies
  - General abbreviations
  - Abbreviations for units
  - Terms in specific languages
    - Afrikaans
    - Albanian
    - Arabic
    - Baluchi
    - Basque
    - Brahui
    - Breton
    - Bulgarian
    - Burmese
    - Catalan
    - Chinese
    - Croatian
    - Czech
    - Danish
    - Dutch
    - English

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Challenges: Serials

- **WEM Lock and Serials Cataloging**
- "[The serial work: a workaround]" to discuss with the CONSER
- CONSER community's opinions and preferences on whether to continue or modify its cataloging practices regarding [provider-neutral description], [newspaper reproductions], and language expressions in light of the "WEM Lock" concept.
- Poll results
- Next steps?

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PCC SCS Pilot Group on CONSER Policies

- Charged to be a decision-making group for CONSER policies for the PCC implementation of Official RDA (Nov. 2022)
    - Identify the impact of policy changes to serials in Official RDA, e.g. Determine when/how to apply the WEM lock to serials (including monographic series) especially with regard to translations and different formats, in MARC and BIBFRAME
    - Identify and write policy and practice documentation to be updated (LC-PCC Policy Statements, Metadata Guidance Documentation, Descriptive Cataloging Manual Z1, CONSER Cataloging Manual, Provider-Neutral Guidelines, etc.), and make recommendations on consolidating documentation into the LC-PCC PSs or the MGDs where possible …
    - Collaborate with other PCC committees and task groups to review and confirm mapping specifications between BIBFRAME and MARC for serials …
- Deliverables: proposed policies and best practices for the WEM lock and other issues, and corresponding documentation updates to be reviewed by SCS and approved by PoCo.
    - Preliminary report due 4/15/23; Date to recommend next steps due: October 1, 2023

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Challenges: Unconstrained elements

- **Unconstrained elements**
  - The unconstrained element set allows data produced according to RDA to be used in applications that do not use the LRM semantics.
  - No domains or ranges
  - WEMI properties from RDA 'dumbed-up' to generic 'resource' properties
    'has title of work', 'has title of expression' etc.
       rdfs:subPropertyOf 'has title'
  - Unconstrained elements are not RDA elements
  - Transformation a one way street
  - 2020 PCC recommendation based on BIBFRAME mapping issues.

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Challenges: IRI debate–MARC 21 $0 or $1

- MARC 21 $0 = Authority record control number or standard number
- MARC 21 $1 = Real World Object URI (see https://www.loc.gov/marc/bibliographic/ecbdcntf.html for details)
- Recording an RDA IRI in $0 = an **identifier**
  - Transforms a "thing" into a "string"
  - Strings cannot be guaranteed to be unique outside of a local application
- Recording an RDA IRI in $1 = **real-world object**
  - A "thing", not a "string"

An example:
How to use the documentation

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	Element name	Range	Recording method	PCC RL (MGD)	Alternate label	Data value	Data provenance
1							
2	**Appellation**						
3	name of person	nomen	Unstructured		has name of person:	Li Feng	Title page
4	preferred name of person	nomen	Unstructured		has preferred name of person:	Li Feng	Title page
5	variant name of person	nomen	Unstructured		has variant name of person:	李峰	t.p., Xi Zhou de mie
6	authorized access point	nomen	Structured		has authorized access point of	Li, Feng, 1962-	
7	variant access point for	nomen	Structured		has variant access point for	李峰, 1962-	t.p., Xi Zhou de mie
8	identifier for person	nomen	Identifier		has identifier for person:	1	
9	**Description**						
10	date of birth	timespan	Structured - EDTF		has date of birth:	19620704	Email the author
11	place of birth	place			has place of birth:		
12	place of death	place			has place of death:		
13	place of residence	place	Structured		has place of residence:		
14	language of person		Structured - MARC		has language of person:	eng	
15	profession or occupation		Structured		has profession or occupation:	Archaeologists	LCDGT
16	field of activity of person		Structured		has field of activity of person:	Archaeology	LCSH
17	note on person				has note on person:		
18							
19	**Relationships**						
20	employer	corporate body	Structured	employer	has employer:	Columbia University	NAF
21	alternate identity of	nomen		alternate identity	has alternate identity of person:		
22	real identity of person	nomen		real identity	has real identity of person:		
23	author person of	work		author of	is author person of:		
24	aggregator person of	work		aggregator of	is aggregator person of:		
25							
26	PCC Relationship Labels MGD: https://www.loc.gov/aba/rda/mgd/relationshipLabels/index.html						

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LC-PCC Metadata Guidance Document

- Official RDA Toolkit: elements
- LC-PCC PS
- MG: Persons
- Relationship Labels for Persons
  - Person to Corporate body
    - employer
      - Definition: A corporate body who employs a person. PCC relationship label: *employer*
      - Inverse: employee

Download PDF

Entities > Person > name of person

name of person

Select Policy Statement Set (3)

LC-PCC PS

Definition and Scope

A nomen that is an appellation of person in natural language and phrasing used in common discourse.

👁 Element Reference

Prerecording

A *name of person* may be:

- a real name
- a pseudonym
- a term of rank of nobility
- a nickname
- initials of a name
- an assigned name

A value of *name of person* may:

- include a value of Person: surname � that has no parts
- include a value of Person: surname ⎔ that consists of two or more parts separated by spaces or hyphens

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LC/PCC Core for preferred name of person.

Variant name of person is optional.

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- Relationship elements will be recorded in 5XX fields with the relationship element given in subfield $i, preceded by subfield $w r, and followed by a colon.

Examples	

MARC	Example 1
	
	`100 1# $a Warren, Whitney, $d 1864-1943`
	510 2# $w r $i Founded corporate body of person: $a Warren & Wetmore
	
	Example 2
	
	`100 1# $a Boxer, Barbara`
	510 2# $w r $i Person member of corporate body: $a Democratic Party (U.S.)

BIBFRAME	• Record an IRI for the instance of a Nomen as a real-world object. • NARs for persons will continue to be created and maintained in the NAF using MARC 21 coding and syntax.

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010			nr2006024093
040			UkCU ǂb eng ǂe rda ǂc UkCU ǂd DLC ǂd OCoLC ǂd DLC ǂd NNU
046			ǂf 19620704 ǂ2 edtf
100	1		Li, Feng, ǂd 1962-
374			Archaeologists ǂ2 lcdgt
400	1		Feng, Li, ǂd 1962-
400	1		李峰, ǂd 1962-
510	2		ǂw r ǂi Employer: ǂa Columbia University
667			Machine-derived non-Latin script reference project.
667			Non-Latin script reference not evaluated.
670			Landscape and power in early China, 2006: ǂb t.p. (Li Feng, Columbia University) jkt. (assistant prof. of early Chinese cultural history,
670			E-mail from author, Sept. 11, 2006 ǂb (b. July 4, 1962)
670			Xi Zhou de mie wang, 2007: ǂb t.p. (李峰 = Li Feng; Chinese translation of Landscape and power in early China)

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Upcoming webinars or workshops

Core Forum Webinar Series: The New and Official RDA Toolkit: A Practical Approach

- This four-part webinar series from CORE is geared toward catalogers, metadata librarians, and anyone interested in RDA. The series begins March 14th.
  - Official RDA: A Standard for Our Changing Times
  - Title Proper in the Official RDA Toolkit
  - RDA, Policy Statements, and MGDs: How the Documentation Works Together
  - Describing a Person Using Official RDA

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How to Propose a Change to RDA

The "Submit Feedback" link in the official RDA Toolkit enables users to provide information about typos, errors, and broken links, as well as suggested changes to the text. Some of this feedback has resulted in updates to RDA. But for more significant changes to RDA, cataloging communities have another venue to suggest modifications: the RDA change proposal process.

Join Past RSC Chair Kathy Glennan as she reviews the updated policies and procedures for making an RDA change proposal from the RSC's perspective. She will also share her experiences from creating over 30 proposals or discussion papers to modify RDA when she served as the ALA Representative to the RDA Steering Committee (and its predecessor, the Joint Steering Committee for Development of RDA).

Making an RDA Proposal
Monday, March 27 from 10:00 to 11:00 AM CT

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NARDAC Spring Update Forum

The North American RDA Committee (NARDAC) Update Forum is an event aimed at bringing together experts in the field of library and information science to present/discuss developments in RDA and RDA related cataloging work. In addition to an update on NARDAC work, this spring's forum will feature three interesting topics: research about gendered language in non-English sources, RDA examples in the Toolkit, and PCC SCT RDA Training Task Group work and update. The distinguished speakers include Dr. Ahava Cohen (EURIG representative), Honor Moody (RDA Examples Editor) and Adam Baron (PCC SCT RDA Training Task Group chair).

NARDAC Spring Update Forum
Monday, April 3rd -- 2:00 to 3:30 pm Central Time

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2023 ALA Annual Conference

- The NARDAC RDA Forum
- The RDA and Linked Data session
- The RDA preconference, organized by Core

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Outreach Activities in Asia

RSC Outreach Activities

- WCEO created a spreadsheet/workbook for RSC outreach activities, including WCEO, EOO and Translations.
- WCEO received an invitation from the National Central Library, Taipei, Taiwan
  - RDA Webinar Series on 9/23/2022
  - BIBFRAME & Linked Data on 9/2/2022
  - RDA Reference: plan to translate it into Chinese Traditional scripts
  - Upcoming webinars in 2023

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RDA Outreach Activities in Asia

- National Diet Library
  - Thanks to Naomi Shiraishi (UC Berkeley) for a bilingual letter.
  - NDL is interested in the official RDA Toolkit but unsure of implementation timeline yet.
- CALIS (China Academic Library & Information Systems)
  - A webinar to hold at the end of May or early June in 2023
- National Library of Korea: to plan
- Outreach plans in Asia
  - WCEO collaborates with the Asia representative of the RDA Board, from the National Library Board of Singapore, who proposes an outreach plans covering the 4 subregions for Asia (East Asia, South Asia, SEA & Central Asia)

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- Provide your feedback concerning the Official RDA Toolkit, LC-PCC Policy Statements and Metadata Guidance Documentation.
- Let's think globally and act locally!

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References

- [RSC presentations](#)
  - ▪ Kathy Glennan, The Times They Are A-Changin: The "Whys" of RDA Toolkit Restructure & Redesign (3R) (6/22)
  - ▪ Jamie Hennelly, Coming Soon: Plans for Community Resources (11/22)
  - ▪ Damian Iseminger, Building for the Future: Linked Open Data and RDA (6/22)
  - ▪ Elesa Sze, Teaching RDA in the LIS Classroom (2/23)
  - ▪ Charlene Chou, RDA Updates (9/22)
- NARDAC workshop (6/22)

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Thank you!

If you have any questions, email
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