Report to PCC SCS on CC:DA – Annual 2012

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**Report from the chair**

CC:DA has set an internal deadline to finalize ALA RDA change proposals of July 25, 2012. The committee will need to review and respond to proposals from other JSC constituencies during August/September.

**Report from the Library of Congress Representative**

Barbara Tillett highlighted items from the Library of Congress report; the full document is available on the “LC at ALA” website: <http://www.loc.gov/ala/an-2012-update.html>.

**Report from the JSC Representative**

John Attig summarized the JSC’s recent work, which falls into four different areas of activity:

* Rewording RDA

The JSC has reviewed drafts from the copy editor and comments on the drafts from the U.S. RDA Test Coordinating Committee. The process is almost complete for the first round of chapters under review (chapters 9, 10, 11, 6 and 17 – in that order). While the rewording exercises have limited objectives, some good ideas and techniques have emerged. The completed chapters will be released this fall in the RDA Toolkit. Rewording work continues on additional chapters; the next ones under consideration are 2, 3 and 7. Eventually all of the RDA chapters will go through this process.

* RDA vocabularies and element sets

The majority of definitions are ready for consideration, and the JSC hopes to approve and publish these in the open metadata registry in July. Related definitions will appear in the RDA Glossary by this fall. The JSC has identified some issues that require further discussion, such as revisiting terms that have already been published and revision proposals to restructure certain areas. Work on the element sets has not yet started.

* Correcting the text of RDA

This work is separate from the rewording project and uses the JSC’s fast track process. The scope of this work is correcting typos and incorrect wording, updating examples, and including additional relationship designators. Most of these revision requests have come out of reports from the RDA test. As the corrections are approved by the JSC, the updates appear in the RDA Toolkit. Most of these changes are not included in the update tracking contained in the Toolkit.

* Revision proposals for the upcoming JSC meeting, Nov. 6-9, 2012 in Chicago

In addition to the ALA proposals arising from CC:DA, other constituencies are also at work creating proposals, including some from communities that are not directly represented on the JSC (such as the European RDA Interest Group, the ISSN Network, and the ISBD Review Group). A list of potential proposals for the JSC meeting is available at <http://www.rda-jsc.org/2012possibleproposals.html>. As proposals are released for constituency review, they will be linked from this page. Only proposals approved by the JSC at this meeting will be incorporated into RDA by the March 2013 implementation date.

The JSC has received additional proposals from the Library of Congress and the British Library, but CC:DA did not have time to consider them at this meeting. Discussions will take place either via e-mail or on the CC:DA wiki.

[**Report from the Task Force on Machine-Actionable Data Elements in RDA Chapter 3**](http://www.libraries.psu.edu/tas/jca/ccda/docs/tf-MRData3.pdf)

This discussion paper looks at a way to structure data elements in RDA Chapter 3 that contain quantitative information, using an aspect-unit-quantity model. Because this would be a significant change to RDA and to the way catalogers record data, the task force has sought review by a wider cataloging community. One question raised in the CC:DA discussion was whether this approach would be instead of, rather than in addition to, existing extent statements. At this point, that issue remains unresolved. The committee approved passing this forward to the JSC as a discussion paper at its November meeting; the final version will include a summary statement that will help clarify the feedback desired from the JSC.

[**Report from the Task Force on Relationship Designators in RDA Appendix K**](http://www.libraries.psu.edu/tas/jca/ccda/docs/tf-appK3.pdf)

CC:DA discussed several of the questions raised in this report and will continue its deliberations on the wiki. This may not be ready to go to the JSC for its November meeting. The major questions include:

* Are the proposed additional terms too narrow?
* Is it appropriate to use prepositions?
* Should the list include gender-neutral or gender-specific terms, such as “parent” vs. “father”?
* Can the same term be used in different sections, such as “member” in both person and corporate relationships?

[**Report from the Task Force on RDA Instructions for Governmental and Non-Governmental Corporate Bodies**](http://www.libraries.psu.edu/tas/jca/ccda/docs/tfgov-4.pdf)

CC:DA generally had few comments on this proposal, which seeks to combine instructions for government bodies and other corporate bodies in order to reduce redundancy and complexity in RDA. The committee approved the document with editorial work identified during the discussion and pending review of the individual examples on the wiki.

[**Report from the Task Force to Investigate Changes Affecting RDA in the Chicago Manual of Style, 16th Edition**](http://www.libraries.psu.edu/tas/jca/ccda/docs/tfchicago3.pdf)

This task force was established to investigate any changes that should be considered in RDA that are associated with the new 16th edition of the Chicago Manual of Style. The changes may impact two different aspects of RDA: the format of the instructions themselves (such as capitalization practice in headings for instructions), and changes in how data is recorded under RDA (such as hyphenating compound colors). A final report from this task force is expected at Midwinter 2013.

**Revision proposals from** [**AALL**](http://www.libraries.psu.edu/tas/jca/ccda/docs/aall3.pdf) **&** [**CEAL**](http://www.libraries.psu.edu/tas/jca/ccda/docs/ceal2012-1.pdf)

CC:DA considered these related proposals at the same time, since they touch on the same instructions: *Recording Chinese Pace Names in RDA 16.2.2* and *Revision of RDA 16.2.2.9, Places in certain federations*. These proposals raise significant issues about why countries are treated differently and if there’s a generalizable solution that will meet the needs of a variety of RDA users. Another question is what can actually be resolved in this RDA revision cycle.

The committee discussed the issues at length and concluded: RDA needs both a short-term and long-term solution; the ALA short-term proposal should focus on generalizing the CEAL proposal, with examples outside of China added; ALA should also put forward the AALL proposal, with some changes in the language.

[**MLA proposal on Instructions for Librettos**](http://www.libraries.psu.edu/tas/jca/ccda/docs/mla2012-4.pdf)

The Music Library Association is seeking a solution for authorized and variant access points for those situations where the author of the words and the composer of the music are the same person (such as Wagner’s operas). The committee discussed the proposal and is interested in seeing how the alternative would play out. Discussion will continue on the wiki.

[**Revision proposal from OLAC on video encoding formats**](http://www.libraries.psu.edu/tas/jca/ccda/docs/olac2012-1.pdf)

OLAC proposed revisions to the list of digital video encoding formats and adding a new instruction to accommodate information about optical disc characteristics. CC:DA approved the proposal with editorial corrections. The committee will also need to make a recommendation for where the new instruction should appear in Chapter 3; that discussion will continue on the wiki.

[**Report from the Task Force on Sources of Information**](http://www.libraries.psu.edu/tas/jca/ccda/docs/tf-sourcesofinfo3.pdf)

This report included five appendices addressing particular issues identified by the task force. The committee agreed to consider the first four and to eliminate the fifth, which was created as an alternate approach to one of the issues.

*Appendix A: Proposal to clarify the status of containers*: approved as amended, changing “issued by the publishing body” to “issued by the publisher.”

*Appendix B: Draft proposal for revision of RDA 2.1.2.2.* Discussion centered on how a cataloger determines what constitutes a single vs. multipart unit: container + disc? compact disc + booklet? 2 DVD-set in a single container? The committee expressed interest in ignoring accompanying material in these cases and agreed that the draft proposal was on the right track.

*Appendix C: Draft proposal for revision of RDA 2.1.2.3.* The task force rewrote this section on resources issued in more than one part to create mutually exclusive categories. The committee agreed that the draft was basically going in the right direction; serials experts will contribute improved wording in the wiki.

*Appendix D: Draft proposal for revision of RDA 2.2.2.2–2.2.2.4 (principally for dealing with embedded metadata).* The task force’s proposal emphasizes a preference for eye-readable metadata over machine-readable metadata and lowers the priority for choosing embedded metadata as a source of information. The committee generally agreed with the proposed changes.

CC:DA also agreed that the task force’s draft workflow charts were helpful and should be included with the proposal that goes forward to the JSC. Ultimately, they could be added to the RDA Toolkit.

[**Revision proposal regarding Hearings**](http://www.libraries.psu.edu/tas/jca/ccda/docs/schiff2012-1.pdf)

This proposal addresses the impact of a recent change to RDA that makes hearings named corporate bodies. This represents a change from AACR2 practice. The committee agreed that this is not a desirable outcome and recommended moving forward, using option 2 as the basis for the ALA proposal.

**Report from the RDA Conference Forums and Programs Task Force**

The programs presented at ALA Annual were well attended. The all-day preconference on RDA and authorities had 90 preregistered attendees and 4 onsite registrations. The RDA Update Forum attracted an audience of over 240 people. The session *Transformation: Revenge of a “Fallen” Code* had 180 people in attendance. The Task Force is planning a preconference for ALA Annual 2013: *RDA, Back to the Basics*. This group will be disbanded at the close of Annual 2013.

[**Report from the RDA Planning and Training Task Force**](http://www.libraries.psu.edu/tas/jca/ccda/docs/RDATraining1206.pdf)

This task force continues to focus on RDA webinars, which have been very well attended. Some additional offerings are planned for the fall.

**MARBI report**

MARBI considered several discussion papers and proposals at this conference.

[Proposal No. 2012-02](http://www.loc.gov/marc/marbi/2012/2012-02.html): Identifying Titles Related to the Entity Represented by the Authority Record in the MARC 21 Authority Format. This proposal, sponsored by PCC, proposed a new field in the MARC 21 Authority Format for making titles related to the entity represented by the authority record machine-actionable. During its discussion, MARBI raised issues with subfield coding for authors that could not be resolved during the meeting. This paper will return for consideration at Midwinter 2013.

[Proposal No. 2012-03](http://www.loc.gov/marc/marbi/2012/2012-03.html): Data Provenance in the MARC 21 Bibliographic Format. This proposal sought to better document data provenance in the MARC 21 Bibliographic Format. MARBI chose option 2, the creation of a new field which would be linkable to other fields through the use of subfield $8.

[Proposal No. 2012-04](http://www.loc.gov/marc/marbi/2012/2012-04.html): New data elements in the MARC 21 Authority Format for *Other Designation Associated with the Person* and *Title of the Person*. This proposal discussed ways in which the RDA elements “Other Designation Associated with the Person” and “Title of the Person” could be recorded as discrete data elements in the MARC 21 Authority Format. MARBI went with option 2 and added additional subfields for beginning and ending dates and sources of information.

[Proposal No. 2012-05](http://www.loc.gov/marc/marbi/2012/2012-05.html): Making the 250 Field Repeatable in the MARC 21 Bibliographic Format. MARBI had considerable concerns about this proposal and ultimately rejected it. It may return at Midwinter 2013 after further consultation with affected communities.

[Proposal No. 2012-06](http://www.loc.gov/marc/marbi/2012/2012-06.html): Defining Subfield $c (Qualifying information) in Field 028 (Publisher Number) in the MARC 21 Bibliographic Format. This proposal passed, with an amendment to which subfield will be used (subfield $q instead of $c).

[Proposal No. 2012-07](http://www.loc.gov/marc/marbi/2012/2012-07.html): Defining New Code for Vocal Score in Field 008/20 (Format of music) in the MARC 21 Bibliographic Format. This proposal passed.

[Discussion Paper No. 2012-DP02](http://www.loc.gov/marc/marbi/2012/2012-dp02.html): Authority Records for Medium of Performance Vocabulary for Music. This discussion paper was well received and will come back as a proposal. MARBI preferred opening up a new block of tags for this type of information (16X) instead of using a tag in the 15X block.

[Discussion Paper No. 2012-DP03](http://www.loc.gov/marc/marbi/2012/2012-dp03.html): Chronological Aspects in the MARC 21 Bibliographic and Authority Formats. MARBI considered this information bibliographically significant and suggested that the options should be left open – best practices are needed instead.

[Discussion Paper No. 2012-DP04](http://www.loc.gov/marc/marbi/2012/2012-dp04.html): Recording Audience Characteristics of Works and Expressions in the MARC 21 Bibliographic and Authority Formats. MARBI preferred the use of the 3XX block for this information, rather than putting controlled vocabulary in field 521. Creating a new field for this data would make the 008/22 redundant, so MARBI agreed that this could be folded into the new 3XX instead.

[Discussion Paper No. 2012-DP05](http://www.loc.gov/marc/marbi/2012/2012-dp05.html): Recording Creator/Contributor Group Categorizations of Works, Expressions, and Persons in the MARC 21 Bibliographic and Authority Formats. MARBI again recommended the use of a new 3XX field for this information and spent some time discussing the connections and differences between geographic, nationality, and linguistic aspects associated with a given creator/contributor. This will need to be explored further when this comes back as a proposal.

The Library of Congress plans to continue issuing MARC updates semiannually. They also recently added several classification schedules to id.loc.gov: B, M, N and Z.

Finally, MARBI will be disbanded at the close of Annual 2013. A new committee will be formed, the ALCTS/LITA Metadata Standards Committee, which will be charged with a leadership role in the creation and development of metadata standards for bibliographic information. The Library of Congress will continue to maintain MARC and will meet with national library partners to work out how to proceed with the MARC Advisory Committee, which will continue.

**Report from ALA Publishing**

Troy Linker reminded everyone that the double user offer for the RDA Toolkit expires in August.

In relation to the RDA rewording project, everyone is pleased with the results. ALA Publishing will work toward having the completed revised chapters added to the Toolkit by December. The goal is to have all of the chapters reworded and in the Toolkit by mid-2013.

The RDA print product has not been updated since publication. Given the nature and scope of the changes made to date, which affected 90% of the pages, it is not practical to do an update packet. Instead, ALA Publishing will issue a new print version in December, which will include the reworded chapters and the April 2012 update. The remaining updates related to the rewording should be available as updates in mid-2013; after that time, the print product should have annual updates.

Some changes have been made to the RDA Toolkit, including a preference to load a whole chapter instead of the smaller sections. They have added an update history, core element basic instruction filters, and links to the JSC full record examples.

ALA Publishing continues to offer two types of ongoing webinars: the [RDA Toolkit Essentials](http://www.rdatoolkit.org/essentials), an introduction and guide to using the Toolkit (offered every other month, with the next offering on July 18); and the [RDA Virtual User Group](http://www.rdatoolkit.org/virtualusergroup), an online interactive webinar focusing on development planning for the RDA Toolkit (offered 3-4 times a year, with the next offering on July 19).

Development priorities include: translations, better integration with the RDA registry, improving display on mobile devices, integrating the new LC-PCC Policy Statements (including a new icon), working on the RDA data model, and opportunities to publish related schema in the Toolkit.

**CC:DA business**

A CC:DA task force drafted an update to the document *Building International Descriptive Cataloging Standards* that describes CC:DA’s role. The document was approved with revisions suggested during the discussion.

The CC:DA webmaster presented her work on the proposed transition of the CC:DA website.

The new chair of CC:DA will be Peter Rolla. The committee will hold its meetings at the usual times at ALA Midwinter in Seattle.