

To: Joint Steering Committee for Development of RDA
From: Barbara Tillett, Chair, JSC
Subject: RDA Examples Group: Terms of Reference

Related documents:

[5JSC/Chair/1/Rev/3 RDA Examples Group: Terms of Reference](#)
[6JSC/RDA/Complete Examples \(Bibliographic\)/Revised \[2010/06/17\]](#)
[6JSC/RDA/Complete Examples \(Authority\) \)/Revised \[2010/06/17\]](#)
[5JSC/Complete Examples/Cover Sheet](#)
[6JSC/RDA/Complete Examples/ALA Rep addendum \[2010/05/19\]](#)

Background

The JSC agreed to establish a new RDA Examples Group with a new charge to reflect the changed requirements for developing RDA.

The JSC has developed two types of examples to illustrate the application of RDA:

- **Contextual examples:** are included in the text of RDA and illustrate the instruction with which they are associated.
- **Complete examples:** are not included in the text of RDA and illustrate the application of RDA to bibliographic and authority data.

Charge

The RDA Examples Group is charged to:

1. identify new contextual examples for inclusion in revisions of RDA, or drafts of new content, as directed by JSC and in accordance with the JSC Schedule of work
2. recommend fast track proposals to the JSC for changes to contextual examples in RDA for the next scheduled update
3. add further complete examples to illustrate the application of RDA to different resources and with alternative encoding schemes.
4. to make recommendations to the JSC for the future development of the complete examples into a resource to support teaching and application of RDA.

Membership

The RDA Examples Group should comprise members drawn from JSC constituencies and other appropriate bodies. The initial Group membership is:

- Chair: Kate James (Policy & Standards Division, Library of Congress, U.S.) kjam@loc.gov
- Pam Coleman (BL, UK) pam.coleman@bl.uk
- Emma Cross (Carleton University, Canada) emma.cross@bac-lac.gc.ca
- Anita Krawalski (DNB, Germany) a.krawalski@dnb.de
- Laura May (LAC, Canada) laura.may@bac-lac.gc.ca
- George Prager (New York University; PCC Task Group on RDA records, U.S.) PragerG@exchange.law.nyu.edu
- Adam Schiff (University of Washington, U.S.) aschiff@U.WASHINGTON.EDU
- David Wells (Curtin University, Australia) D.Wells@curtin.edu.au

Resources and method of working

The Group should use the current version of RDA in the Toolkit.

Members of the Group will be provided with access to RDA Toolkit.
It is expected that the group will work by email or use tools for document sharing.

General guidance for Examples

1. Prefer examples with literary warrant wherever possible.
2. Provide simple and clear cut examples. If an example has the potential to confuse, don't include it.
3. Examples should not introduce anything which itself would require explanation (e.g., words that need to be defined).
4. The language preferred by the agency should be taken as English. Likewise, the script preferred by the agency should be taken as roman.
5. Follow Appendices A-E.

CONTEXTUAL EXAMPLES

Form of the contextual examples

Language and script of examples

- Each example should follow the instruction that it illustrates with respect to language and script. Note: specific instructions may override the instructions on *Language and script of the description* given in the relevant general instruction in the first chapter of each section.
- Non-English language examples and examples using different scripts, etc., should be given if they are necessary to illustrate an instruction.
- To ensure that the examples can be understood, at least one example under each instruction should be of an English language resource. Where relevant, use the ALA-LC Romanization Tables (1997) (e.g., prefer Pinyin to Wade-Giles in examples which require a transliteration for Chinese).

Capitalization

- The examples should follow *RDA. Appendix A. Capitalization* as instructed in the relevant general instruction in the first chapter of each section, and any specific guidance given in the instruction.

Punctuation and Display

- The examples should follow the relevant general instruction in the first chapter of each section, and RDA Appendices D and E where relevant.
- The Appendix E provides information on displaying authority data in MARC21 and in a display using AACR2 punctuation (e.g., use of a hyphen after an open date will be included in the information on AACR2 punctuation, and the examples should follow that punctuation).
- Terminal punctuation is not to be used for any example, i.e., no distinction to be made between an annotation and a controlled access point.
- Whenever the instructions do not require information to be given in a specific form, different forms may be used in the examples, e.g., 1,000 vs. 1000 in extent to illustrate that there is not just one way of recording the numbers

Abbreviations

- The examples should follow *Appendix B. Abbreviations* as instructed in the relevant general instruction in the first chapter of each section, and any specific guidance given in the instruction.

Initial articles

- The examples should follow *Appendix C. Initial articles* where instructed to do so.

Explanatory text

- Include the *type of resource or entity* in the explanatory text for instructions on access points used to record the relationship between a resource and a person, family, or corporate body associated with the resource (as often the access points given are reflective of the type of resource).
- Where possible, add the *specific relationship designator* in the explanatory text for instructions on access points used to record the relationships between entities.

Use of the same examples

- Where relevant, use examples based on the same resource under different instructions, e.g., when the instructions show alternatives; when the instructions show different conventions (providing they are all applicable); under the instruction for entities associated with the work and again under entities associated with the expression, and again under instructions on identifying works and expressions.

Relationship to the instructions

- Examples that consist only of a word which is prescribed in the instructions are not necessary.
- When a see reference is made to another instruction, examples illustrating the see reference are not given.
- Only give examples illustrating alternatives at the Alternative. Later examples should illustrate only the application of the main instruction. Similarly for Optional additions or Optional omissions.
- Examples are illustrative, not prescriptive; therefore examples should not be created to make up for a perceived lack in an instruction. Instead, suggest a change or addition to the instruction through your JSC representative.
- Examples under general instructions should not require the application of a later instruction, or of a special instruction. An exception to this is the instructions on the construction of an access point.

Range of examples

- If the instruction mentions several things that fall within its scope, provide an example of each.
- Have a reason for including every example and do not include multiple similar examples.
- Overall, in drafts for constituency review, include where applicable:
 - examples that cover a variety of media types, carrier types, and content types
 - examples of web resources and archival resources
 - examples for works, etc., in different genres
 - examples for different types of creator, etc. (persons, families, and corporate bodies)

- examples drawn from the US, UK, Canada, Australia, and Germany.
- But, do not include examples of each of these at every instruction.

COMPLETE EXAMPLES

Form of the complete examples

- Complete examples shall be provided in at least two versions, one of which shall be as RDA elements.
- Complete examples shall be explicitly labelled to identify:
 - the entity or type of resource described (e.g., work, person)
 - the encoding used.

RDA Element version

Examples will be annotated to indicate:

- core elements
- the methodology by which each relationship is expressed (identifier, controlled access point, structured description, or unstructured description)
- whether an alternative or optional instruction has been applied, for example, show information multiple ways: basic instruction first, then again with appropriate alternative and/or option.

Record the following information for each element:

- RDA instruction reference
- RDA element
- data recorded.

Encoded versions of RDA data

- Encoded versions of examples should match the RDA element version for completeness and granularity, subject to the limitations of the schema being used.
- Encoding provided should be sufficient for understanding of the example, but need not be comprehensive (e.g., not all fixed field data in the MARC record is supplied).
- Give brief explanation of elements that cannot be encoded or are not fully encoded.
- Encodings may include MARC, MODS, MADS, Dublin Core, etc.

Record the following information for each encoded element:

- notation n(e.g., MARC tag, indicator and subfield designation)
- label (e.g., MARC field name if needed)
- data recorded.

Sources of information

Complete examples may be supplemented by images of title pages or other sources of information (assuming issues of copyright can be resolved).