

**To:** Committee of Principals for AACR  
Joint Steering Committee for Revision of AACR

**From:** Deirdre Kiorgaard, Chair, JSC

**Subject:** 2005 Annual Report

Attached is the annual report of the Joint Steering Committee for 2005.

## 2005 ANNUAL REPORT

This document contains the report of the Joint Steering Committee for Revision of AACR (JSC) to the Committee of Principals for AACR (CoP) for the calendar year 2005. The Chair of JSC, Deirdre Kiorgaard, has prepared the report.

### Membership

The membership of the Committee was as follows:

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|---|--|
| <b>American Library Association:</b>  | Jennifer Bowen<br>(University of Rochester Libraries)                        |
| <b>Australian Committee on Cataloguing:</b>                                 | Deirdre Kiorgaard<br>(National Library of Australia)                         |
| <b>British Library:</b>   | Sally Strutt   |
| <b>Canadian Committee on Cataloguing:</b>                                   | Margaret Stewart<br>(Library and Archives Canada)                            |
| <b>CILIP: Chartered Institute of Library and Information Professionals:</b> | Hugh Taylor<br>(Cambridge University Library)                                |
| <b>Library of Congress:</b>   | Barbara Tillett  |
| <b>Chair:</b>   | Sally Strutt until 14 October 2005<br>Deirdre Kiorgaard from 15 October 2005 |
| <b>Secretary:</b>   | Nathalie Schulz  |

### Meetings

Two meetings were held in 2005. The first, hosted by the American Library Association representative, was held in Chicago on 24-28 April 2005. The second was hosted by the British Library representative in London on 10-14 October 2005. During the April 2005 meeting, the JSC met jointly with the Committee of Principals (CoP).

## **New Approach – From AACR3 to RDA**

During 2005, the JSC and Committee of Principals decided to take a different approach to the new edition. This new approach acknowledges that the current environment is very different from that in which AACR2 was developed: digital resources pose new challenges, and the records produced by the rules are used in a digital environment. *RDA — Resource Description and Access* is now envisaged as a new standard for resource description and access, designed for the digital world.

In order to carry this forward, JSC and the Committee of Principles decided to establish an effective project management structure for RDA and to appoint a project manager. Marjorie Bloss was appointed as RDA Project Manager in October 2005. The JSC strategic plan was also comprehensively revised to reflect goals and strategies for the development of RDA in the period from 2005-2008, and the JSC policy document was revised to reflect a new relationship between JSC and the constituencies during the content development phase of RDA.

During the second half of 2005, the JSC worked with the co-publishers to develop specifications for the functional requirements of a Web-accessible version of RDA. In late 2005/early 2006 a prototype was created for use in focus groups, and this was demonstrated at ALA Midwinter and with members of CILIP/BL and the Library of Congress.

## **Project schedule**

Work on RDA has been scheduled as follows:

- Oct. 2005-April. 2006: Completion of draft of part I, and constituency review
- May 2006-Sept. 2006: Completion of draft of part II, and constituency review
- Oct. 2006-Apr. 2007: Completion of draft of part III, and constituency review
- May 2007-Sept. 2007: Completion of General Introduction, Appendices, and Glossary
- 2008: Publication

The program of work developed at the October 2005 meeting in London may be found in the minutes for that meeting (item 59).

## **2005 update**

The final update to AACR2 was published in 2005. This update contained rule revisions approved by the JSC in 2004.

## **RDA Content development**

- *RDA Objectives and Principles*

During 2005, JSC discussed the objectives and principles guiding the development of parts I and II of RDA. A draft statement was made available on the JSC Web site.

- ***RDA Part I***

At the October 2005 meeting, the JSC discussed the Editor's first draft of RDA part I. Detailed constituency comments on the December 2004 draft of AACR3 part I were discussed in the context of the new draft. The JSC also discussed proposals from the constituencies relating to:

- levels of description, access, and authority control
- sources of information
- simplification of the instructions, using the instructions on recording publication information as an example
- instructions for archival and manuscript resources
- the musical presentation statement

For details on the decisions made at the meeting, see the Outcomes (see <http://www.collectionscanada.ca/jsc/0510out.html>).

JSC reviewed the second Editor's draft of part I in November 2005, and a revised draft of part I for constituency review was issued in December 2005. The draft of chapter 3 was issued in January 2006.

- ***RDA Part II***

Prior to the April 2005 meeting, the Editor created a draft of part II for discussion by the JSC. Because of the change in direction, this was discussed only at a general level.

In May 2005, the JSC Chair issued a call to the constituencies for proposals to simplify AACR2 chapter 21 special rules for musical works, art works, legal works, religious works, and academic works. CCC, LC, ALA and CILIP submitted proposals, and all constituencies made comments. In those areas where there was agreement, the Editor will make changes in the preliminary draft of part II that will be issued to the JSC in March 2006.

## **Outreach and Communication**

Significant steps were made during 2005 both to identify key stakeholders and to improve communication and outreach with stakeholders.

- ***New and improved ways of communicating***

One very positive step in improving communication with stakeholders was making the December 2005 draft of RDA part I publicly available on the JSC Web site.

Also established in 2005 was the RDA discussion list, RDA-L, which has been both positively received and extensively used for discussion. The Project Manager and JSC

have also developed FAQs for inclusion on the Web site (see <http://www.collectionscanada.ca/jsc/rdafaq.html>).

In order to communicate and provide context for the new approach taken by RDA, the Editor prepared a Prospectus. The Prospectus, including a draft outline of all chapters, was mounted on the JSC Web site in July 2005 and a Web form provided for comments. A revised version of the Prospectus was issued following the October 2005 meeting (see <http://www.collectionscanada.ca/jsc/rdaprospectus.html>).

After each of the JSC meetings, executive summaries were devised and made available to other communities. These were in addition to the detailed outcomes statements that are traditionally posted on the JSC Web site to inform the constituencies and the wider cataloguing community.

During 2005, there were 20 formal presentations on RDA at locations around the world; a list of these is maintained on the JSC Web site (see <http://www.collectionscanada.ca/jsc/rdapresentations.html>). These presentations were given both by JSC members and by members of the constituencies. In order to assist those making presentations on RDA, the text of a general presentation RDA is maintained on the JSC Web site, along with translated versions in Chinese, French and Spanish.

- ***Links with specific communities***

The JSC received responses to the December 2004 draft of AACR3 from rule makers in France, Korea, Germany, China, Spain, Russia, and from the ISSN International Centre. The JSC has been in contact with rule makers from other countries, and provided comments on Italian headings rules.

During the October 2005 meeting, the JSC met with representatives of the UK book industry, and the two groups agreed to continue discussions regarding the potential for interoperability between the two communities' metadata sets, particularly between RDA and the International Standard Text Code (ISTC) and the proposed ISO Party Identifier.

- ***RDA Outreach Group***

During 2005, an Outreach Group was formed to support the JSC. Matthew Beacom (ALA) is Chair of the group, and the members are: Everett Allgood (ALA); Robina Clayphan (CILIP/BL); Ebe Kartus (ACOC); Christine Oliver (CCC)

Significant activities of the Outreach Group during 2005 include:

- A presentation to the Program for Cooperative Cataloging (PCC) on the relation between RDA and PCC (ALA Annual, June 2005)
- Preparation of a series of RDA-update sessions at ALA Midwinter meetings and Annual conventions.

- Consultation with DCMI community at Dublin Core Metadata Initiative 2005 conference

## **JSC Working Groups**

In addition to the RDA Outreach Group mentioned above, there were two JSC Working Groups working on content development for RDA in 2005. Members of these groups are listed below with their constituency affiliations.

### **RDA Examples Group**

**Chair:** Denise Lim (CCC)

**Members:** Catherine Argus (ACOC); John Bowman (CILIP/BL); Pat Riva (CCC); David Sommerfield (LC); Jay Weitz (ALA)

The Group prepared a status report for the October 2005 meeting, and will submit a report on all examples in part I of RDA in time for the April 2006 meeting.

### **GMD/SMD Working Group**

**Chair:** Patricia Thurston (ALA)

**Members:** Ann Chapman (CILIP/BL); Ebe Kartus (ACOC); Daniel Paradis (CCC); Helena Zinkham (LC)

This working group formed in July 2005 and charged with identifying terms to indicate type and form of content, and type and form of carrier. The Group presented a report in January 2006, and constituency responses will be discussed at the April 2006 meeting.

## **Acknowledgements**

I would like to thank the following:

- The outgoing Chair, Sally Strutt, for her leadership and for enabling a smooth transition.
- The Secretary, Nathalie Schulz, for her continued professionalism, support and patience.
- The members of the JSC constituencies and working groups, for their valuable contributions to developing the content of RDA, and for communicating the value of RDA to others.

**Deirdre Kiorgaard**

**Chair, Joint Steering Committee for Revision of AACR**