

**To:** Committee of Principals for AACR  
Joint Steering Committee for Development of RDA

**From:** Margaret Stewart, Chair, JSC

**Subject:** 2008 Annual Report

Attached is the annual report of the Joint Steering Committee for 2008.

## 2008 ANNUAL REPORT

This document contains the report of the Joint Steering Committee for Development of RDA (JSC) to the Committee of Principals for AACR (CoP) for the calendar year 2008. The Chair of JSC, Margaret Stewart, prepared the report with the assistance of the JSC Secretary, Nathalie Schulz.

### Membership

The membership of the Committee was as follows:

<b>American Library Association:</b>	John Attig (Penn State University Libraries)
<b>Australian Committee on Cataloguing:</b>	Deirdre Kiorgaard (National Library of Australia)
<b>British Library:</b>	Alan Danskin
<b>Canadian Committee on Cataloguing:</b>	Margaret Stewart (Library and Archives Canada)
<b>CILIP: Chartered Institute of Library and Information Professionals:</b>	Hugh Taylor (Cambridge University Library)
<b>Library of Congress:</b>	Barbara Tillett
<b>Chair:</b>	Deirdre Kiorgaard (until 31 December 2008)
<b>Secretary:</b>	Nathalie Schulz

### Meetings

One meeting was held, in Chicago from 13-22 April 2008. At this time, a joint meeting was held with the Committee of Principals and the co-publishers.

### Release of RDA Full Draft

The major focus of 2008 was preparing for the release of the full draft of RDA for constituency review. Prior to 2008, RDA draft chapters for constituency review were PDF versions of Microsoft Word chapters prepared by the Editor. During 2008, in preparation

for the RDA online product, the draft was converted to XML under the co-ordination of the co-publishers. It was intended that the Editor and Chairs of the Examples Groups would make any further changes to RDA content in an online authoring system.

At the joint meeting of the CoP and the JSC in April 2008, it was decided that the full draft for constituency review would be issued in August 2008 in a pre-release version of the online product. The announced release date was subsequently adjusted to mid-October 2008. When it became clear that the software would not be available for the release of the full draft, PDFs were created and posted on the RDA Web site on November 17, 2008.

During the period from May to September 2008 it became evident that the authoring system could not be used as a collaborative editing tool as expected. Final changes to the content were keyed by a third party, leaving insufficient time for thorough proof reading and corrections.

The delay in the release of the full draft for review curtailed the time allocated for the review and meant that it coincided with the Christmas period. In addition, although RDA content had been developed for use within an online product, reviewers had to assess RDA content in a linear manner and contend with PDFs containing errors. These factors had a significant negative impact on both the quality of the review and, more broadly, on the credibility of the RDA project.

## **RDA Content development**

The completion of a draft of all RDA chapters and appendices was a significant accomplishment and marked the culmination of a very intense period for the JSC, the RDA Editor and the JSC Working Groups.

Although the JSC had a very productive meeting in April 2008, a number of comments and issues required further discussion and resolution following the meeting. The RDA review wiki, hosted by the National Library of Australia, proved to be a valuable tool for working through outstanding comments in priority order. In addition, the JSC held nine conference calls to reach consensus on various issues. Resolution of some complex issues was deferred until after the first release of RDA ([5JSC/Sec/6](#)).

Highlights of the work undertaken in 2008 include:

- Consideration of outstanding constituency comments on RDA Sections 2-4, 9
- Decisions on remaining priority issues related to RDA Chapter 3 (Carrier)
- Review of the RDA Introduction
- Determination of RDA core elements
- Designation of roles in RDA ([5JSC/LC/11](#))

Several other significant tasks were undertaken in 2008.

The LC representative drafted Appendix K (Relationships between persons, families, and corporate bodies) and the ALA representative prepared Appendix J (Relationships between works, expressions, manifestations, and items) for inclusion in the RDA full draft. As the JSC constituencies have not reviewed these two appendices, the JSC has specifically invited comments on them for consideration at the March 2009 meeting.

In February 2008, the Library of Congress proposed a number of changes to the instructions on constructing preferred titles for musical works and expressions ([5JSC/LC/12](#)). At the April 2008 meeting, the JSC decided that due to the specialist nature of the proposal, it would be preferable for experts from some of the constituencies to meet to discuss the responses. This meeting was held in May 2008 at LC. A follow-up document has been issued and constituency comments will be discussed at the March 2009 meeting.

The JSC benefited from the assistance of a Glossary Editor to develop the RDA Glossary. Sally Strutt took on this role and focused on definitions of terms in the former part A of RDA. Nathalie Schulz took over this role and worked on terms arising from the former part B of RDA, and made final changes.

## **RDA transition documents**

Although training in RDA is not the responsibility of the JSC, the JSC gave some thought to what assistance could be given to people reviewing the full draft. The following documents were prepared to assist with the transition from AACR2 to RDA:

- [5JSC/Chair/14](#) (Using RDA with bibliographic and authority records)
- [5JSC/Chair/15](#) (RDA Core elements and FRBR user tasks)
- [5JSC/Sec/7](#) (Changes to AACR2 instructions)

In addition, some sample workflows were provided with the full draft to give an indication of how RDA could be used.

## **JSC Working Groups**

The JSC has relied heavily on specially formed working groups, and the members of these working groups have made a substantial ongoing contribution to the content of RDA. Members of the Working Groups are listed below with their constituency affiliations.

### **RDA Examples Group 1**

**Chair:** Denise Lim (CCC – resigned from the Group in 2008)

**Members:** Catherine Argus (ACOC); John Bowman (CILIP/BL – resigned from the Group in 2008); Kevin Randall (ALA); Pat Riva (CCC); David Sommerfield (LC); Jay Weitz (ALA)

This group is responsible for Section 1 (Chapters 1-4), and Section 2, Chapter 7 of RDA. After the retirement of Denise Lim from LAC, the JSC Secretary took on the role of making updates to examples in these chapters.

### **RDA Examples Group 2**

**Chair:** Adam Schiff (ALA)

**Members:** Catherine Argus (ACOC); Joan Biella (LC – resigned from the Group in 2008); John Bowman (CILIP/BL – resigned from the Group in 2008); Kim Doyle (LAC); David Sommerfield (LC); Aaron Taub (LC); Jay Weitz (ALA); Kathy Winzer (ALA)

This Group is responsible for all other chapters of RDA.

Both Examples Groups (and the Chairs of the Groups in particular) worked diligently throughout the year meticulously checking and updating the examples included in the full draft for constituency review. The Groups also prepared the complete examples issued as Appendix M.

### **Appendices Working Group**

**Chair:** Judith Kuhagen (LC)

**Members:** John Attig (ALA); Kathy Glennan (ALA)

During the year, the Group finalized the appendices on Capitalization, Abbreviations, and Initial Articles.

### **Outreach and Communication**

During 2008 members of the JSC, the RDA Outreach Group, and other people connected to the development of RDA, gave 29 formal presentations on RDA in locations around the world. (A list of presentations is maintained on the JSC Web site: <http://www.collectionscanada.ca/jsc/rdapresentations.html>).

The JSC and CoP hosted a successful IFLA Satellite Conference on RDA in August 2008. The RDA Project Manager co-ordinated the development of an RDA brochure for distribution at this event and at other presentations.

The RDA discussion list, RDA-L, now has 1095 subscribers from 38 countries.

### **RDA Outreach Group**

In 2008, the membership of the group was as follows:

**Chair:** Christine Oliver (CCC)

**Members:** Everett Allgood (ALA); Matthew Beacom (ALA – resigned from the Group in 2008); Robina Clayphan (CILIP/BL – resigned from the Group in 2008); Gordon Dunsire (CILIP); Ebe Kartus (ACOC)

The Group continued to work with the Project Manager, and individual members of the Group were involved in giving presentations on RDA.

### **Links with specific communities**

- ***IFLA Cataloguing Section***

Margaret Stewart continued as the JSC liaison to the ISBD Review Group (ISBD RG).

At the April 2008 meeting, the JSC discussed concerns raised by the ISBD RG and IFLA FRBR Review Group regarding some elements that are required in ISBD and in FRBR and not in RDA. The JSC subsequently made some revisions to align more closely with ISBD and FRBR.

Appendix D of RDA contains a section on ISBD presentation, and at the request of the Group those ISBD elements designated as mandatory in the consolidated edition of the ISBD have been marked. The ISBD RG also reviewed the instructions on ISBD punctuation in Appendix D, and as a result, some changes were made.

In the second part of the year, the JSC constituencies were asked to consider two proposals from the ISBD RG, which related to the ongoing ISBN/ISSN/AACR2 harmonization (see [5JSC/Chair/13](#) series).

The JSC submitted comments on the draft *Statement of International Cataloguing Principles* during the worldwide review period.

- ***Rule makers in other countries***

Rule makers in France, Germany, Norway, and Sweden submitted formal responses to the draft of RDA Sections 2-4, 9. The JSC provided some written feedback on their comments on this draft and previous drafts issued for review.

- ***RDA and MARC 21***

During 2008, an RDA/MARC Working Group was established to collaborate on the development of proposals for changes to the MARC 21 formats to accommodate the encoding of RDA data. The Group has prepared a number of proposals and discussion papers for MARBI, which are listed at:

<http://www.collectionscanada.ca/jsc/rdamarcwg.html>.

Mappings from MARC 21 Bibliographic and Authority Formats to RDA can be found in appendices D and E.

- ***Dublin Core Metadata Initiative (DCMI)***

The DCMI RDA Task Group continued their work on registering the RDA data element set and RDA controlled vocabularies in the National Science Digital Library (NSDL) Metadata Registry. The JSC will be reviewing the registry entries following the March 2009 JSC meeting.

The JSC is working with the Group on the DC-RDA mapping for inclusion in Appendix D of RDA.

- ***MODS/MADS***

Following the release of the full draft for constituency review, the MODS/MADS Editorial Committee offered to prepare a MODS-RDA mapping as part of the RDA product. The JSC accepted this offer and will review a draft mapping at the March 2009 meeting.

## **Acknowledgements**

I would like to thank the following:

- The outgoing Chair, Deirdre Kiorgaard, for her exceptional leadership and dedication, and for her diligence in ensuring a smooth transition.
- The Chairs of the Examples Groups 1 & 2, Denise Lim and Adam Schiff, and the Chair of the Appendices Working Group Judy Kuhagen, and each of the members of those groups, for their perseverance and meticulous attention to the task at hand. Special thanks to Nathalie Schulz for taking over the remaining tasks relating to the Group 1 Examples.
- The Editor, Tom Delsey, for his sustained focus through many challenges.
- Nathalie Schulz, for her outstanding contribution as JSC Secretary.
- The JSC for their concerted efforts and valuable contributions to developing the content of RDA.
- The RDA Project Manager, Marjorie Bloss, for her ongoing support and for her significant role in making the IFLA Satellite Conference on RDA a success.
- The members of the Committee of Principals for their continuing sponsorship of the RDA development process.

**Margaret Stewart**

**Chair, Joint Steering Committee for Development of RDA**