To: RDA Board
and
RDA Steering Committee

From: Gordon Dunsire, Chair, RSC

Subject: Annual report for 2015

This is the Annual Report of the Joint Steering Committee for Development of RDA (JSC) – now the RDA Steering Committee (RSC) – to the RDA Board (formerly the Committee of Principals) for the calendar year 2015. The Chair of the RSC, Gordon Dunsire, prepared the report with assistance from the RSC and RSC Secretary, Judith A. Kuhagen.

PEOPLE

Membership

The initial plan for the transition from the current structure of the JSC was for the representation of the UK’s Chartered Institute of Library and Information Professionals (CILIP) to end after the November 2015 meeting. However, because the CILIP representative to the JSC was unable to attend the JSC meeting, the timetable was brought forward to the annual meeting of the joint CILIP-BL Committee on RDA (http://www.slainte.org.uk/aacr/) on September 10, 2015. The separate representations of the communities of the British Library and CILIP were merged to form a UK RDA community, with Alan Danskin, formerly the representative of the British Library and current Chair of EURIG, becoming the UK representative on the JSC. This arrangement is temporary.
The JSC -- November 2015

Left to right in the above photo, the membership of the JSC shown at the November 2015 meeting was as follows:

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
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<tbody>
<tr>
<td>Chair, Committee of Principals</td>
<td>Simon Edwards</td>
</tr>
<tr>
<td>Chair, JSC</td>
<td>Gordon Dunsire</td>
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<tr>
<td>Australian Committee on Cataloguing</td>
<td>Ebe Kartus (Australian Catholic University)</td>
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<tr>
<td>Secretary, JSC</td>
<td>Judy Kuhagen</td>
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<tr>
<td>American Library Association</td>
<td>Kathy Glennan (University of Maryland)</td>
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<tr>
<td>United Kingdom</td>
<td>Alan Danskin (British Library)</td>
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<tr>
<td>Canadian Committee on Cataloguing</td>
<td>Pat Riva (attending for William Leonard)</td>
</tr>
<tr>
<td>Special guest/Vice-Chair, EURIG</td>
<td>Verena Schaffner</td>
</tr>
<tr>
<td>Library of Congress</td>
<td>David Reser</td>
</tr>
<tr>
<td>Deutsche Nationalbibliothek</td>
<td>Susanne Oehlschlager (attending for Christine Frodl)</td>
</tr>
<tr>
<td>JSC Examples Editor</td>
<td>Kate James</td>
</tr>
</tbody>
</table>

**JSC Groups**

Five new working groups, identified below by an asterisk, were established.

The **JSC Aggregates Working Group** membership was:

- Catherine Amey (National Library of New Zealand Te Puna Mātauranga o Aotearoa)
- Greta de Groat (Stanford University, USA)
- Gordon Dunsire (JSC), *Co-chair*
- Deborah Fritz (The MARC of Quality, Inc., USA), *Co-chair*
- Francis Lapka (Yale Center for British Art, USA)
- Françoise Leresche (European RDA Interest Group/Bibliothèque nationale de France)
- Melissa Parent
- Verena Schaffner (European RDA Interest Group/Austrian Library Network)
- Chris (Christine) Todd (National Library of New Zealand Te Puna Mātauranga o Aotearoa)
- Valerie Weinberg (Library of Congress, USA)

The **JSC Capitalization Instructions Working Group** membership was:

- Sue Andrews (University of British Columbia, Canada)
- Carlo Bianchini (University of Pavia, Italy)
- Anders Cato (European RDA Interest Group/Danish Agency for Culture)
- Ageo Garcia (Tulane University, USA)
Mauro Guerrini (University of Florence, Italy)
Anita Krawalski (Deutsche Nationalbibliothek, Germany)
Pat Riva (Bibliothèque et Archives nationales du Québec, Canada), Chair
Marja-Liisa Seppälä (National Library of Finland)
Larisa Walsh (University of Chicago Libraries, USA)

The **JSC Fictitious Entities Working Group** membership was:

- Gordon Dunsire (JSC)
- Mary Anne Dyer (Virginia Commonwealth University, USA)
- Sandra Macke (Multnomah County Library, Oregon, USA)
- Robert Maxwell (Brigham Young University, USA)
- Richard Moore (British Library)
- Gayle Porter (Chicago State University, USA)
- Mark Scharff (Washington University in St. Louis, USA)
- Amanda Sprochi (University of Missouri, USA), Chair
- Stephanie Zutter (National Library of Luxemburg)

The **JSC Music Working Group** membership was:

- James Alberts (Library of Congress, USA)
- Anders Cato (Danish Agency for Culture/European RDA Interest Group)
- Jean Harden (University of North Texas, USA)
- Damian Iseminger (New England Conservatory, USA), Chair
- Kevin Kishimoto (University of Chicago, USA)
- Daniel Paradis (Bibliothèque et Archives nationales du Québec, Canada)
- Raymond Schmidt (Wellesley College, USA)
- Tracey Snyder (Cornell University, USA)
- Valerie Weinberg (Library of Congress, USA)
- Steve Yusko (Library of Congress, USA)

The **JSC Places Working Group** membership was:

- Christian Aliverti (Swiss National Library)
- Gordon Dunsire (JSC), Chair
- John Hostage (Harvard Law School Library, USA)
- Kate James (Library of Congress, USA)
- Kevin M. Randall (Northwestern University Library, USA)
- Esther Scheven (Deutsche Nationalbibliothek)

The **JSC RDA/ONIX Framework Working Group** membership was:

- John Attig (Pennsylvania State University, USA)
- Graham Bell (Editeur)
- Alan Danskin (British Library)
The JSC Relationship Designators Working Group* membership was:

- Gordon Dunsire (JSC), Chair
- Ebe Kartus (Australian Catholic University)
- Françoise Leresche (Bibliothèque nationale de France/European RDA Interest Group)
- George Prager (New York University Law School Library, USA)
- Pat Riva (Bibliothèque et Archives nationales du Québec, Canada)
- Mirna Willer (ISBD Review Group)

The JSC Technical Working Group membership was:

- John Attig (Pennsylvania State University, USA)
- Gordon Dunsire (JSC), Chair
- Deborah Fritz (The MARC of Quality, Inc., USA)
- Sarah Hartman (Deutsche Nationalbibliothek)
- Diane Hillmann (Metadata Management Associates, USA)
- Ricardo Santos Muñoz (Biblioteca Nacional de España/EURIG)
- Marja-Liisa Seppälä (National Library of Finland/EURIG)

Because the JSC Translations Working Group* was established near the end of the year, the membership had not been decided.

At the November meeting, the JSC decided to establish two additional working groups in early 2016: archives and rare materials.

Collaboration with Other Groups

JSC members are liaisons to these groups:

- Alan Danskin to the European RDA Interest Group (EURIG)
- Alan Danskin to ONIX
- Gordon Dunsire to IFLA’s FRBR Review Group
- Gordon Dunsire to the ISSN International Centre
- Christine Frodl to the IFLA ISBD Review Group (Gordon Dunsire substituting for Christine Frodl).
Protocols were established between the JSC and the FRBR Review Group and between the JSC and the ISSN International Centre. The RSC will continue to seek collaboration with similar groups responsible for the development and maintenance of bibliographic and other standards related to RDA.

The JSC Chair was a liaison to the Committee of Principals of RDA.

The JSC Chair and the JSC Secretary were liaisons to the RDA Development Team, managed by ALA Publishing on behalf of the Co-Publishers.

Certificates of Appreciation

The JSC approved certificates of appreciation to the following individuals:

- Paul Cunnea, Graeme Forbes, and Gill Hamilton for contributions to the local organization of the JSC meeting 2015 and related events
- Carol Campbell and Francine Millard for contributions to the local organization of the RLS-athon 2015
- Alan Danskin, Galen Jones, and Susanne Oehlschläger for contributions to the development of RDA as a member of the JSC
- Deborah Fritz, Richard Fritz, Diane Hillmann, and Jon Phipps for contributions to the promotion of RDA
- Jennifer Baxmeyer, Barbara Bushman, Kathy Glennan, Ebe Kartus, Robert Maxwell, Jean Pajerek, Melanie Polutta, Chris Todd, Susan Wynne, and Thurstan Young for contributions to the Jane-athons promoting RDA

PROCESS AND COMMUNICATION

RDA-L, the JSC websites, and Google Drive

Activity on RDA-L, an electronic forum for discussion of RDA, as of December 1, 2015:

- 3185 subscribers (2927 subscribers in December 2014)
- 1835 messages posted from January-November 2015 (2452 for the same period in 2014)

Over 35 countries are represented by RDA-L subscribers.

The new Drupal website was made public in June 2015. It includes a link to the earlier, now archived, site. Documents posted before June 2015 are represented by links to the earlier site; documents issued after May 2015 are posted on the new site. On November 6, the site and its URL were updated to reflect the new name of the committee.
The JSC, assisted by James Hennelly, used Google Drive throughout the year. That tool enabled the JSC to track progress on various activities (e.g., discussing and agreeing to “Fast Track” changes, sharing information on proposals they intended to prepare, registering agreement for revised proposals).

**Meetings**

The JSC had its annual meeting in Edinburgh, Scotland, from 2-6 November 2015 at the National Library of Scotland. Simon Edwards, Chair of the Committee of Principals, attended the meeting.

53 observers from 18 countries (Belgium, Croatia, Czech Republic, England, Finland, France, Germany, Iceland, Italy, Latvia, Netherlands, Scotland, Slovenia, Spain, Sweden, Switzerland, United States, and Wales) attended public sessions of the meeting.

Auxiliary events in Edinburgh brought the overall attendance to 100+ and included:

- a meeting of area music librarians with Damian Iseminger, chair of the JSC Music Working Group, and Massimo Gentili-Tedeschi, chair of the ISBD Review Group, hosted by Edinburgh University Library.
- visits by observers to rare materials departments at Edinburgh University Library and the National Library of Scotland.
- a meeting of the ACRL/RBMS Descriptive Cataloging of Rare Materials Task Force (ALA DCRM Task Force) hosted by the National Library of Scotland.
- a seminar on rare materials and RDA on November 6 organized by the Cataloguing and Index Group Scotland and an international committee of rare book cataloguing experts.
- an RLS-athon on November 9 organized by the Cataloguing and Index Group Scotland and the JSC.

At the end of the last session on November 6, the Joint Steering Committee for Development of RDA became the RDA Steering Committee. At a reception in Edinburgh’s City Chambers that evening, more steps were taken to move to the new governance model:

- renaming the JSC as the RDA Steering Committee (RSC)
- renaming the Committee of Principals as the RDA Board
- moving the JSC website to a new domain for the RSC (http://rda-rsc.org, with redirects from the earlier site).

The National Librarian of Scotland, Dr. John Scally, welcomed the JSC and 50 guests to the reception. Simon Edwards, Chair of the RDA Board, and Gordon Dunsire, Chair of the RSC, thanked the National Library of Scotland for its generous hosting of the JSC meeting and thanked the Library and BDS: Bibliographic Data Services for sponsoring the reception.
RDA CONTENT

RDA Instructions

Changes from 33 documents (both successful proposals and recommendations from working group advisory papers approved during and after the November 2014 meeting) were added to RDA Toolkit in the April 2015 Update. The changes were documented by the JSC Secretary in “Sec final” versions of those proposals posted on the website.

August 3 was the deadline for proposals, discussion papers, and advisory papers for the November 2015 meeting. October 5 was the deadline for constituency responses to those proposals and papers. 38 documents were submitted for the November 2015 meeting:

- ALA: nine proposals and a discussion paper
- BL: three proposals, a discussion paper, and a BL rep paper
- CCC: four proposals
- LC: three proposals
- JSC Aggregates Working Group: one advisory paper
- JSC Capitalization Instructions Working Group: one advisory paper
- JSC Fictitious Entities Working Group: one advisory paper
- JSC Music Working Group: seven proposals and three discussion papers
- JSC Places Working Group: one advisory paper
- JSC Technical Working Group: two advisory papers

Changes to RDA resulting from proposals approved by the JSC during the 2015 meeting and subsequent email exchanges will appear in the April 2016 update of RDA Toolkit. The text of approved proposals will be issued as documents labeled as “Sec final” versions and posted on the RSC website during February 2016. A table listing the JSC decisions/actions for all proposals and papers will also be posted on the website. Some of the major decisions taken are summarized in the Outcomes of the November 2015 JSC meeting.

The “Fast Track” process was used by the JSC to make straightforward changes to correct and improve text in RDA during the year. The JSC Secretary documented these minor revisions in “Sec” documents that are posted on the website.

There were five releases of RDA Toolkit in 2015:

February release:
- 60 corrections/minor revisions of instructions and/or examples
- 5 new and revised relationship designators + definitions
4 new and revised glossary terms + definitions
2 new terms in vocabulary list

April release (in addition to changes from 2014 proposals):
19 corrections/minor revisions of instructions and/or examples
15 new and revised relationship designators + definitions
19 new and revised glossary terms + definitions

August release:
68 corrections/minor revisions of instructions and/or examples
17 new and revised relationship designators + definitions
19 new and revised glossary terms + definitions

October release:
120 corrections/minor revisions of instructions and/or examples
12 new and revised relationship designators + definitions
11 revised glossary definitions

December release: no changes in RDA content (Finnish translation added)

**RDA Controlled Vocabularies**

Version 2.2.0 of the RDA element vocabularies was released in May 2015. This version synchronized the RDA element set vocabularies with the April 2015 release of RDA Toolkit, and added 5 newly-published value vocabularies. Partial French, German, and Spanish translations of the value vocabularies were also included.

Version 2.3.0 was released in June 2015 to correct some minor errors. Version 2.3.1 was released in October 2015 to synchronize with the October 2015 update to RDA Toolkit. This release also added the Toolkit Glossary forms of labels and definitions for the RDA element sets and value vocabularies.

The number and types of element published by the end of 2015 are:

- 269 Agent properties
- 268 Expression properties
- 60 Item properties
- 254 Manifestation properties
- 296 Work properties
- 824 Unconstrained properties
- 4 Meta-element properties
- 33 RDA/ONIX Framework elements
- 8 Classes

Fourteen value vocabularies for the RDA/ONIX Framework for resource categorization were published in the RDA Registry, along with 4 sets of RDA refinements to the vocabularies.
The RDA Development Team developed and published linked data maps between ISBD and RDA, ISBD and RDA/ONIX Framework, and RDA and RDA/ONIX Framework. 31 issues raised in the GitHub RDA-Vocabularies project were closed; 28 remain open.

OUTREACH

JSC Work with External Communities

Details of JSC work with external communities are given in the liaison reports in the Appendices.

Jane-athons

The first full Jane-athon, a hackathon for creating RDA linked data about the works of Jane Austen and related resources, took place January 30, 2015 in Chicago during ALA Midwinter. The attendees used RIMMF (RDA in Many Metadata Formats) to create RDA/FRBR entity records from imported MARC 21 records or as born-RDA, and link them using RDA designators. RIMMF is an editor for data that conforms to RDA Toolkit and the RDA Registry.

Similar events took place around the world in 2015; “Jane-athon” has become a generic term for these events:

- London, England in May: Agatha Christie and her works
- San Francisco, California, USA in June: Jane Austen and her works
- Wellington, New Zealand in October: Maurice Gee and his works
- Edinburgh, Scotland in November: Robert Louis Stevenson and his works

A total of 230 people attended the five Jane-athons in 2015.

Further information about the Jane-athons, and free downloads of RIMMF and RDF data to use with RIMMF, are available at the R-balls website: http://rballs.info/

RDA IMPLEMENTATION FOR JSC NATIONAL LIBRARY COMMUNITIES

DNB and the German-speaking library networks: The project for the implementation of RDA in the libraries and library networks in Germany, Austria and German-speaking Switzerland has come to a successful end. After a long and intensive period of training, all partners in the project have started cataloguing according to RDA. A focus in 2016 will be the support for an implementation of RDA for those libraries not organized in the Committee for Library Standards or not in a library network; these libraries are mostly public libraries or libraries with special collections.
All information about RDA in the German-speaking countries is available here [https://wiki.dnb.de/display/RDAINFO/RDA-Info](https://wiki.dnb.de/display/RDAINFO/RDA-Info) (in German language only).

Appendices:

- report of the JSC Chair
- report of the JSC Secretary
- report of the JSC Examples Editor
- report of the JSC Aggregates Working Group
- report of the JSC Capitalization Instructions Working Group
- report of the JSC Fictitious Entities Working Group
- report of the JSC Music Working Group
- report of the JSC Places Working Group
- report of the JSC RDA/ONIX Framework Working Group
- report of the JSC Relationship Designators Working Group
- report of the JSC Technical Working Group
- report of the JSC Translations Working Group
- report of the JSC liaison to EURIG
- report of the JSC liaison to the IFLA FRBR Review Group
- report of the JSC liaison to the IFLA ISBD Review Group
- report of the JSC liaison to the ISSN International Centre
- report of the JSC liaison to ONIX
2015 report of the JSC Chair

This report covers the period January-October 2015.

The JSC Chair participated in the following conferences and meetings:

- 30 January-2 February 2015: ALA Midwinter Meeting, Chicago, Ill., USA. A presentation on “Blade runner: my first R-Ball” was given to the first Jane-athon on 30 January 2015; a presentation on “RDA in the wild: taking RDA into the global” was given to the RDA Forum on 1 February 2015; a presentation on “What is an RDA subject?” was given to the SAC meeting on 2 February 2015.
- 20 May 2015: CILIP CIGS 2015 Post AGM Seminar: RIMMF 3 & RDA data balls, National Library of Scotland, Edinburgh. A presentation on “RDA data, r-balls, and Jane-athons” was given to the seminar.
- 27 May 2015: CILIP CIGS seminar: RDA for Implementers, National Library of Scotland, Edinburgh. A presentation on “RDA development and implementation overview” was given to the seminar.
- 26-29 June 2015: American Library Association Annual Conference, San Francisco, Calif., USA. A presentation on “Engaging with RDA: governance and strategy” was given to RDA Forum on 27 June 2015. A version of the same presentation was given to ALA CC:DA on 29 June 2015.

Links to presentations are available at http://www.gordondunsire.com/presentations.htm

The JSC Chair attended the following meetings:

- 3 February 2015: RDA Toolkit Technical Committee, Philadelphia, Pa., USA.
- 27-30 April 2015: Committee of Principals of RDA, Chicago, Ill., USA.
- 27 June 2015: ALA CALM, San Francisco, Calif., USA.
- 28 June 2015: ALA ACRL RBMS, San Francisco, Calif., USA.
- 14-20 August 2015: IFLA World Library and Information Congress, Cape Town, South Africa.
- 18 August: IFLA 2016 RDA Satellite Organizing Committee, Cape Town, South Africa.
- 21 August 2015: FRBR Review Group meeting on FRBR-LRM, Cape Town, South Africa.

The JSC Chair also participates in online meetings of:

- CILIP CIG E-forums on RDA.
- RDA Development Team.
- JSC working groups.

The JSC Chair authored the following publications related to RDA:


Links to publications are available at
http://www.gordondunsire.com/publicationsrecent.htm

Submitted by: Gordon Dunsire, Chair, JSC
Date: 20 October 2015
2015 report of the JSC Secretary

After the November 2014 meeting:

- monitored/managed the comments on the revised proposals and 31 Sec final drafts of approved proposals (some Sec final drafts in revised versions)
- posted Sec final documents on JSC website
- updated the Actions document on Google Drive and sent reminders to JSC about deadlines
- prepared public and restricted versions of meeting minutes
- prepared certificates of appreciation for Chair’s signature
- helped Chair prepare annual report
- updated Policy documents per meeting decisions
- drafted policy document on preparing proposals and discussion papers for JSC
- updated Editing guide with appendix from the JSC Examples Editor per meeting decisions

To update the RDA content via February, April, August, and October releases of RDA Toolkit:

- coordinated the Fast Track log process
- collected corrections from JSC, translators, and Toolkit users
- received example revisions from the JSC Examples Editor
- identified changes needed for editorial consistency
- followed up on changes identified by the Technical Working Group
- made changes to 384 instructions/examples resulting from approved Fast Track entries, corrections, example revisions, editorial rewording for consistency, and Technical Working Group recommendations (includes 100 instructions revised for editorial consistency)
- for the April release, prepared the changes from the 31 Sec final versions of approved proposals
- continued learning how to make changes in the CMS files but switched to doing the editing using oXygen Editor
- prepared listing of types of edits for Jamie Hennelly to use in preparing training materials for CMS
- proofread changes on stage site and in pdfs from that site
- added to Translations Working Group in October

To communicate with cataloguing communities:

- posted documents (proposals, discussion papers, responses to documents, policy documents, Chair documents) on JSC website
- posted announcements on JSC website
• sent emails about documents and announcements to group of RDA colleagues and JSC, to RDA-L, CATSMAIL (list of IFLA Cataloguing Section), and other lists as appropriate (e.g., BibFrame, Program for Cooperative Cataloging); added EURIG list in October

• revised content moved from old site to new Drupal website and added new content

As member of RDA Development Team:

• participated in conference calls about RDA Registry, Jane-athons, and other development issues
• attended all-day meetings at end of ALA Midwinter Meeting and ALA Annual Conference
• reviewed spreadsheets and other documents for metadataregistry.org and rdaregistry.info
• assisted with registration and other arrangements on day of Jane-athons preceding ALA Midwinter Meeting and ALA Annual Conference

Assisted in planning for 2015 meeting:

• initiated arrangements for hotel and travel with ALA Publishing staff member
• posted announcements about meeting and observers on JSC website
• developed agenda with Chair
• collected names of observers, sending them additional public documents and information about the meeting
• sent emails to JSC and observers about meals
• prepared documents for the meeting: (e.g., instructions listed in proposals/discussion papers and in responses, remaining action items from 20154 meeting, unresolved Fast Track entries from 2015)

Contributed to planning for initial transition to new governance:

• Emails and conference calls with Committee of Principals Chair and JSC Chair to document current procedures
• Reviewed documents about stages of transition
• Prepared draft revisions for segments of to-be-renamed website to be active as of November 6

Submitted by: Judith Kuhagen, Secretary, JSC
Date: 19 October 2015
2015 report of the JSC Examples Editor

At the 2014 JSC meeting a new procedure for examples in approved proposals was implemented. The Examples Editor was responsible for providing examples for approved proposals, and the JSC Secretary inserted them into the Sec final drafts, which were then sent to the JSC for review. This procedure seemed to improve identification and correction of examples in other chapters that were not part of the proposal, but were affected by the proposal. It also facilitated more diversity in examples to have someone focused on the examples overall so that a balance of languages, formats, etc., could be considered. Many examples from proposals were used, and the Examples Editor said suggestions for examples were welcome.

A new procedure for examples in Toolkit releases was also introduced in which the Examples Editor managed most examples changes for the Toolkit updates without submitting them for the Fast Track (FT) process. JSC members sent changes/questions to the Editor. The Editor submitted all examples changes to the JSC Secretary for inclusion in the Sec document listing all changes to be included in a Toolkit release. The Examples Editor also commented on FT submissions when examples were affected to ensure changes in instructions and examples were synchronized.

For the 2015 Toolkit releases, example additions, deletions, and corrections (excluding those from proposals) were made in the following chapters: 1-3, 5-7, 9-11, 16, 17, 19-22, 31, Appendix A, and Appendix F. In addition to those changes initiated by the Examples Editor, changes were prompted by JSC members, the JSC Secretary, emails from the RDA Toolkit Feedback feature, RDA translators, and catalogers using RDA. The first example using Armenian script in the Toolkit was added in the October 2015 release.

Both the authority and the bibliographic complete examples were updated. MARC format and RDA changes were incorporated. In addition, some examples were replaced and added to better reflect the array of RDA elements and instructions. A column indicating the RDA entity for each element was added to the bibliographic examples. Some examples of authorized access points were added to the bibliographic and authority examples due to popular request.

For 2016, the Examples Editor anticipates adding smaller files (e.g. 1-3 examples) of specific types of resources and entities to the Toolkit website that will be listed separately from the two existing sets. These new examples will show other formats besides the RDA element set view and the MARC encoding view. The existing sets are seen as a teaching tool for catalogers and a means to provide some examples for those interested in learning more about RDA generally. The new sets are intended for those already familiar with RDA looking for better visualizations of relationships and more specialized types of examples (e.g., a book of the Bible, a head of state, a photograph). Input from the JSC and appropriate working groups will be solicited for the new complete examples.

Submitted by: Kate James, JSC Examples Editor
Date: 19 October 2015
2015 report of the JSC Aggregates Working Group

The current Membership and Tasks are published as 6JSC/Chair/18/2015/Rev/1.

The Group liaised with the JSC Relationship Designators Working Group, the JSC Technical Working Group, and the RDA Development Team on related tasks.

Submission to JSC

The Group submitted one proposal document for the JSC meeting in November 2015:

- 6JSC/AggregatesWG/1 (RDA and FRBRoo treatment of aggregates)

Status of tasks

1. Investigate the issues for developing RDA instructions and elements for aggregate resources and prepare a proposals/discussion paper by Aug. 3, 2015.

Status: Ongoing. Partially addressed by 6JSC/AggregatesWG/1.


Status: Ongoing. The Group is discussing a briefing paper, and is monitoring the development of FRBR-LRM with respect to aggregates.

1.2. Investigate the utility of FRBRoo sub-classes of Work, Expression, and Manifestation for the description of aggregates in RDA.

Status: Ongoing. Partially addressed by 6JSC/AggregatesWG/1. One member of the Group, Gordon Dunsire, is a member of the FRBR Review Group and CRM Special Interest Group.

2. Liaise with the JSC Music Working Group and JSC Technical Working Group on issues of mutual interest.

Status: Ongoing. One member of the Group, Valerie Weinberg, is a member of the JSC Music Working Group, and two members of the Group, Gordon Dunsire and Deborah Fritz are members of the JSC Technical Working Group.

Proposals for new tasks

There are no proposals from the Group.

Submitted by: Deborah Fritz and Gordon Dunsire, Co-Chairs, JSC RDA/ONIX Framework Working Group
Date: 19 October 2015
2015 report of the JSC Capitalization Instructions Working Group

The Capitalization Instructions Working Group was set up in late February 2015, as a result of the outcomes of 6JSC/CCC/Discussion/1 Internationalization and RDA, Appendix A Capitalization: Discussion Paper. The membership is drawn widely from constituencies and RDA translation languages, and includes expertise in most of the language families which currently have capitalization instructions in Appendix A. The membership and tasks are published as 6JSC/Chair/17/2015.

Submission to JSC

The Working Group submitted a single discussion paper to the JSC:

• 6JSC/CapitalizationWG/1 (Capitalization Instructions and RDA)

Status of tasks

The Working Group has a single task, detailed in three sub-tasks:

1. Review the content and coverage of RDA Appendix A and prepare a proposal/discussion paper by Aug. 3, 2015.

1.1. Review the instructions on capitalization of RDA elements (A.0-A.9) to ensure these are complete.

1.2. Propose possible paths for presenting the language-specific capitalization instructions in a way that is useful for cataloguers working in the translations of RDA as well as those working in English.

1.3. Identify updates needed in specific languages, where the relevant expertise for that language is available.

The Working Group’s discussion paper focused on presenting options relating to task #1.2, for which feedback is desired. The discussion paper also includes status of some preliminary investigations for tasks #1.1 and #1.3.

For 2016, following the guidance received, the Working Group expects to prepare a model for the future presentation of capitalization instructions for use with RDA, as well as to bring its investigations of the content of the instructions themselves to a more concrete level.

Submitted by: Pat Riva, Chair, JSC Capitalization Instructions Working Group
Date: 17 October 2015
2015 report from the JSC Fictitious Entities Working Group

In 6JSC/Chair/19/2015, the Working Group was charged with 5 tasks. The Fictitious Entities Working Group worked via email and met during the ALA meeting in San Francisco to discuss relevant issues, and submitted discussion paper 6JSC/FictitiousWG/1 in August for the following tasks:

1. We reviewed the RDA treatment of Fictitious persons in the context of a proposed consolidation model of FRBR, which treats fictitious persons as a Name/Nomen of a real person entity; and

2. We investigated the future RDA treatment of fictitious families and corporate bodies under the proposed consolidated model. We also have included fictitious places, pseudonyms, and other non-human entities in our discussion.

We will continue to work on the remaining tasks assigned to the Working Group in the interim and pending decisions by the JSC and the release of the full LRM and FRBR Consolidated models. These include:

3. Investigating the requirements of extending the RDA treatment of fictitious entities to the WEMI entities, and to potential entities such as place, event, object, etc.;

4. Liaising with the JSC Technical Working Group on authority issues; and


The Working Group expects to prepare a model for the inclusion of fictitious entities compatible with the framework of the FRBR consolidated model and the Library Reference Model when they are finalized. We also will investigate a method for implementation compatible with the current legacy MARC authority structure as an interim step toward developing a more robust model fully compatible with BIBFRAME or whatever new system is developed. From this we plan to develop concrete RDA instructions for the inclusion of fictitious entities within RDA.

Submitted by: Amanda Sprochi, Chair, JSC Fictitious Entities Working Group
Date: 20 October 2015
2015 report from the JSC Music Working Group

In 6JSC/Chair/14/2015/Rev/1, 7 tasks were assigned by the JSC to the JSC Music Working Group. The JMWG prepared and submitted RDA revision proposals and discussion proposals for the following tasks:

2. Review *RDA* 6.15 and develop proposals that will align the application of the instructions for use with external vocabularies of medium of performance terms, taking into account *RDA* 0.12 and avoiding references to specific external vocabularies. *Revision proposal submitted as 6JSC/MusicWG/14 and discussion paper submitted as 6JSC/MusicWG/Discussion/2.*

3. Review *RDA* 6.16.1.3.1 and investigate whether the definition of serial number can be expanded and determine if further guidance is needed for recording serial numbers. *Proposal revising* *RDA* *6.16 submitted as 6JSC/MusicWG/13.*

4. Investigate if a new element of Medium of Performance of the Expression is needed in *RDA*. Determine if the addition of this element would assist users in finding, identifying, and selecting musical works whose medium of performance is intended to change with each expression. *Discussion paper submitted as 6JSC/MusicWG/Discussion/3.*

5. Review the instructions at *RDA* 6.28.1-6.28.3 and determine if any of the instructions would be better suited as instructions in *RDA* 6.14 or in chapters 19-20, especially as it concerns the treatment of adaptations, arrangements, and added accompaniments. *Discussion paper submitted as 6JSC/MusicWG/Discussion/1.*

6. Investigate *RDA* 6.28.1.10 and determine if the method for resolving conflicts between authorized access points is too restrictive. *Proposal revising* *RDA* *6.28.1.10 and 6.28.1.10.1 submitted as 6JSC/MusicWG/11.*

7. Investigate 6.28.1.11 and determine if other additions to the authorized access points for compilations of musical works are necessary. *Proposal submitted as 6JSC/MusicWG/12*

In addition to these tasks, the Working Group submitted a revision proposal for the text of part of a larger part at *RDA* 6.14.2.7.1.5 as 6JSC/MusicWG/10 and also submitted two proposals (6JSC/MusicWG/15 and 6JSC/MusicWG/16/rev) that were generated by the Finnish Music Group.

Based on the responses to Working Group proposals and discussion papers submitted for the November 2015 JSC meeting, the Working Group asks the JSC to assign the following tasks for 2016:

- Revise *RDA* 6.15 and 6.28.1.9.1, based on responses to 6JSC/MusicWG/14 and 6JSC/MusicWG/Discussion/2.
- Revise *RDA* 6.14.2.7 and 6.28.2, based on responses to 6JSC/MusicWG/10 and 6JSC/MusicWG/16/rev.
• Revise *RDA* 6.28.1.1-6.28.1.8, based on responses to 6JSC/MusicWG/Discussion/1.
• Prepare a discussion paper regarding new expression elements for numeric designation and key due to issues raised in the responses to 6JSC/MusicWG/Discussion/3.
• Prepare a discussion paper concerning performers as part of authorized access points for musical works, especially as it concerns jazz and popular music.

The Working Group has also been maintaining a list of unresolved issues regarding music-related instructions in *RDA*. The Working Group asks the JSC to assign the following additional tasks for 2016:

• Review *RDA* 7.11. Determine if additional instructions for Recording Details of Place of Capture and Recording Details of Date of Capture are needed.
• Revise the scope and definition of Date of Capture in *RDA* 7.11.3.1 and the Glossary to allow for the recording of multiple dates that are not in a range that are associated with the content of a resource.
• Determine if terms for encoding formats related to musical notation are needed in *RDA*.
• Revise the scope of Plate number for music in *RDA* 2.15.3.1 to better align it with the principle of representation in *RDA* 0.4.3.4. Determine if revisions are needed in *RDA* 2.15.3.3 to support the user tasks of *find* and *identify*.

Submitted by: Damian Iseminger, Chair, JSC Music Working Group
Date: 19 October 2015
2015 report of the JSC Places Working Group

The current Membership and Tasks are published as 6JSC/Chair/12/2015.

The Group liaised with the JSC Technical Working Group on related tasks.

Submissions to JSC

The Group submitted one document to the JSC for online discussion:

- 6JSC/PlacesWG/1 (Place as an RDA entity)

Status of tasks

1. Review the treatment of place as an entity and attributes of other entities in RDA and develop proposals for improving relevant aspects of RDA, including machine-actionability.

Status: Ongoing. Partially addressed by 6JSC/PlacesWG/1.

2. Liaise with the JSC Technical Working Group on issues of element analysis, linked data modelling and categorization relevant to places.

Status: Ongoing. The Group notes the papers submitted by the JSC Technical Working Group to the JSC in 2015, and awaits the outcomes.

3. Liaise with the JSC Jurisdiction Task Group on the treatment of jurisdiction as place.

Status: Ongoing. Awaiting action from the Task Group.

4. Review RDA instructions for places in an international context and develop proposals for improvement.

Status: Ongoing. Partially addressed by 6JSC/PlacesWG/1.

5. Make recommendations for the development of RDA Chapter 27 (Related places) and Appendix L (Relationship designators: Relationships between concepts, objects, events, and places).

Status: Ongoing. Partially addressed by 6JSC/PlacesWG/1.

Proposals for new tasks

There are no proposals from the Group.

Submitted by: Gordon Dunsire, Chair, JSC Places Working Group
Date: 19 October 2015
2015 report of the JSC RDA/ONIX Framework Working Group

The current Membership and Tasks are published as 6JSC/Chair/10/2015/rev/1.

The Group liaised with the JSC Technical Working Group and the RDA Development Team on related tasks.

Submissions to JSC

The Group submitted two documents to the JSC for online discussion:

- 6JSC/ROFWG/3 (Guidelines for proposing new carrier and content categories and terms in RDA)
- 6JSC/ROFWG/3/Categories (RDA carrier and content categories)

Status of tasks

1. Review and take forward recommendation #3 in 6JSC/ALA/Discussion/1.
   a. Recommend labels to supplement RDA controlled vocabularies for resource categorization for application in user friendly displays, in collaboration with the RDA Technical Working Group.


2. Monitor and liaise with any further activities related to 6JSC/ALA/Discussion/1 by ALA’s Task Force on Machine-Actionable Data or its successor.


3. Investigate the application of the ROF, and specifically the Character attribute, to the RDA element "Nature of the content" and the potential element "Nature of the work".
   a. Review the current provision for categorization of resources expressed through movement, taking into account the CCC response to Q1 in 6JSC/LC rep/4.

   Status: Ongoing. Sub-task a. is completed by 6JSC/ROFWG/3/Categories.

4. Create guidelines and explanations on proposing new terms in the RDA carrier type, content type, and media type value vocabularies using qualified ROF categories, based on 6JSC/ROFWG/2, by Apr. 30, 2015.

   Status: Completed. Addressed by 6JSC/ROFWG/3 and 6JSC/ROFWG/3/Categories, approved by the JSC and published in August 2015.

Proposals for new tasks
There are no proposals from the Group.

Submitted by: Gordon Dunseire, Chair, JSC RDA/ONIX Framework Working Group
Date: 19 October 2015
2015 Report of the JSC Relationship Designators Working Group

The current Membership and Tasks are published as 6JSC/Chair/20/2015.

The Group liaised with the JSC Aggregates Working Group and JSC Technical Working Group on related tasks.

Submissions to JSC

The Group did not submit any documents to the JSC.

Status of Tasks

1. Investigate the requirements and review the treatment and structure of relationship designators in RDA Toolkit, and prepare proposal/discussion papers, by Aug. 3, 2015.

   1.1. Clarify the relationship of designators to elements.

   1.2. Clarify the requirements of same-entity and cross-entity designators.


3. Review the use of parenthetical entity qualifiers and investigate alternative approaches to designator labels.

   Status: Ongoing. The Group is monitoring the development of accommodation for RDA Toolkit labels in the RDA Registry.


   Status: Ongoing.

Proposals for new tasks

There are no proposals from the Group.

Submitted by: Gordon Dunsire, Chair, JSC Relationship Designators Working Group
Date: 19 October 2015
2015 report of the JSC Technical Working Group

The current Membership and Tasks are published as 6JSC/Chair/11/2015.

The Group liaised with the JSC Aggregates Working Group, the JSC Places Working Group, the JSC Relationship Designators Working Group, and the RDA Development Team on related tasks.

Submissions to JSC

The Group submitted two proposal documents for the JSC meeting in November 2015:

- 6JSC/TechnicalWG/5 (RDA models for authority data)
- 6JSC/TechnicalWG/6 (RDA accommodation of relationship data)

Status of tasks


2. Monitor the need for value vocabulary representations of the RDA Toolkit relationship elements and designators, following recommendation #7 in 6JSC/CILIP rep/3.


3. Investigate the issue of "cataloguer-friendly" and "user-friendly" labels in metadata based on the FRBR/FRAD models using the RDA Element set and Relationship designators, following recommendation #10 in 6JSC/CILIP rep/3 and the responses from BL and DNB.

   Status: Ongoing. The Group is monitoring the development of accommodation for RDA Toolkit labels in the RDA Registry.

4. Explore the issues related to "statements" as aggregates of RDA elements and make proposals based on findings.

   Status: Ongoing. The Group notes the relevant proposals submitted to the JSC in 2015, and awaits the outcomes.

5. Monitor the development of general models for provenance and other meta-metadata and prepare proposals/discussion papers on their application to RDA in due course.

   Status: Ongoing. The Group is monitoring the development of the Meta-element element set in the RDA Registry.

Status: **Completed**.

7. Prepare a discussion paper as follow-up to DNB/Discussion/3 by Aug. 3, 2015

Status: **Completed**. Subsumed into Task 8.

8. Investigate and prepare proposals or discussion papers on how RDA accommodates relationship data as unstructured data, structured textual notes, authorized access points, and identifiers (including linked data) by Aug. 3, 2015

Status: **Completed**.

**Proposals for new tasks**

- Investigate how RDA accommodates data for inverse relationships.

Submitted by: Gordon Dunsire, Chair, JSC Technical Working Group
Date: 19 October 2015
2015 report of the JSC Translations Working Group

The Translations Working Group was established in September 2015. The terms of reference are published as 6JSC/Chair/23. Because membership is not yet complete for representatives of both full and partial translations of RDA, the working group is just beginning its work.

Charge

The overall charge to the working group is to support and advise the JSC in the development of RDA for non-Anglophone communities.

Tasks

1. Advise the JSC on issues involving translations of RDA.

2. Produce recommendations for developing and refining processes for the translation of RDA.

3. Identify areas of the RDA English text which can be developed to improve clarity for international users.

4. Test the functionality of the RDA Registry for managing multi-lingual vocabularies.

5. Liaise with the RDA Development Team on translations of RDA Reference and the RDA Registry.

6. Identify sources of new partial or complete RDA translations.

Submitted by: James Hennelly, Chair, Translations Working Group
23 October 2015
2015 report of the JSC liaison to EURIG

Membership

EURIG’s 2015 members’ meeting was hosted by the Swiss National Library in Bern, on 14th April. The minutes of the meeting can be found on the group’s Website: [http://www.slainte.org.uk/eurig/docs/EURIG2015/2015_EURIG-AM_minutes_final-draft.pdf](http://www.slainte.org.uk/eurig/docs/EURIG2015/2015_EURIG-AM_minutes_final-draft.pdf)

A “new” executive committee was elected:

Alan Danskin (BL) Chair

Verena Schaffner (Austrian Library Network) Vice-Chair

Anders Cato (Danish Ministry of Culture) Secretary

During 2014-15 EURIG has welcomed two new member institutions:

- National Library of Luxembourg
- National Library of the Czech Republic

RDA Development

EURIG members’ reviewed RDA proposals for 2015 and have submitted responses to the following papers:

6JSC/AggregatesWG/1/EURIG response
6JSC/ALA/37/EURIG response
6JSC/ALA/44/EURIG response
6JSC/ALA/45/EURIG response
6JSC/ALA/Discussion/5/EURIG response
6JSC/BL/26/EURIG response
6JSC/BL/Discussion/1/EURIG response
6JSC/BL/rep/2/EURIG response
6JSC/CapitalizationWG/1/EURIG response
6JSC/LC/32/EURIG response
6JSC/MusicWG/12/EURIG response
6JSC/MusicWG/14/EURIG response
6JSC/MusicWG/16/rev/EURIG response
6JSC/PlacesWG/1/EURIG response

EURIG members have contributed to the work of the following JSC Working Groups:
Aggregates

Françoise Leresche (Bibliothèque nationale de France)
Verena Schaffner (Austrian Library Network)

Capitalization Instructions

Anders Cato (Danish Agency for Culture)
Anita Krawalski (Deutsche Nationalbibliothek)
Marja-Liisa Seppälä (National Library of Finland)

Fictitious Entities Working Group

Richard Moore (British Library)
Stephanie Zutter (National Library of Luxemburg)

Places

Christian Aliverti (National Library of Switzerland)
Esther Scheven ((Deutsche Nationalbibliothek))

Music

Anders Cato (Danish Agency for Culture)

RDA/ONIX

Alan Danskin (British Library)
Françoise Leresche (Bibliothèque nationale de France)

Technical

Sarah Hartmann (Deutsche Nationalbibliothek)
Marja-Liisa Seppala (National Library of Finland)
Ricardo Santos Muñoz (Biblioteca Nacional de España)

EURIG established its own Working Group on the Expression Entity, which is contributing to the evaluation of 6JSC/AggregatesWG/1, and working on its own tasks.

Consultation on RDA governance

EURIG submitted a response to the CoP consultation on RDA governance and strategy and has engaged with the transition process. Consultation with members is underway to enable the establishment of the RDA Europe Region during 2016. The CILIP and BL constituencies have been merged and it is hoped that an interim Europe representative will be nominated before the 2016 JSC meeting.

EURIG will be formally represented by the Vice-Chair, Verena Schaffner, at 2015 JSC meeting.
Simon Edwards has been invited to attend the 2016 Member's meeting, which will be held in Riga, Latvia, 23-25 May.

**RDA Implementation**

**DACH**

Austrian Library Network announced its [first RDA catalogue record](#) on August 17th, 2015

DNB announced the commencement of RDA cataloguing on 1st October.

Fundación Ignacio Larramendi's [ILS DIGIBIB](#) supports RDA cataloguing.

National RDA implementations are also in progress in the following countries:

- Czech Republic
- Finland
- Iceland
- Latvia
- Netherlands
- Sweden

Submitted by: Alan Danskin, Chair, EURIG, and JSC liaison to EURIG

Date: 19 October 2015
2015 report of the JSC liaison to the IFLA FRBR Review Group

The liaison was able to attend the two regular meetings and full-day extra meeting of the FRBR Review Group (FRBRRG) held in Cape Town, South Africa, during IFLA 2015.

The extra meeting was devoted to a discussion of the draft FRBR-Library Reference Model. Several topics of current interest to the JSC were raised, including fictitious entities, aggregates, and the Nomen entity. The FRBRRG expects to hold a world-wide review of FRBR-LRM early in 2016, with final approval in August 2016.

The JSC responded to world-wide reviews of FRBROO and PRESSoo. FRBRRG agreed to take over maintenance and development of PRESSoo from the ISSN International Centre and Bibliothèque nationale de France. PRESSoo is going through the formal approval process for IFLA standards. FRBROO is going through the final stages of the same process. The FRBROO element set was added to the Open Metadata Registry in November 2014.

FRBRRG intends to publish namespaces for PRESSoo and FRBR-LRM in due course, with linked data maps from the FRBRer, FRAD, and FRSAD elements to the LRM elements.

FRBRRG agreed a Protocol between the JSC and the FRBR Review Group, published as 6JSC/Chair/21 in March 2015.

Submitted by: Gordon Dunsire, JSC liaison to FRBR Review Group
Date: 20 October 2015
2015 report of the JSC liaison to the IFLA ISBD Review Group

The *Protocol between the JSC and the ISBD Review Group* published as 6JSC/Chair/13 continues to operate successfully.

The JSC Chair continues to act as a substitute for the JSC Liaison to the ISBD Review Group (ISBDRG), and was able to attend the ISBDRG and ISBD Linked Data Study Group (ISBDLDSG) meetings in Cape Town, South Africa, during IFLA 2015.

Mirna Willer stood down as Chair of the ISBDRG, and was replaced by Massimo Gentili-Tedeschi. Massimo accepted the invitation to attend the JSC 2015 meeting in Edinburgh for the session on serials.

Clément Oury is the new ISSN Network liaison to the ISBDRG and ISBDLDSG.

ISBDRG approved version 3.1 of the *Alignment of ISBD elements with RDA elements*. The version was checked for consistency with the October 2015 updates of RDA Toolkit and the RDA Registry.

The ISBD Unconstrained element set was published in the Open Metadata Registry in August 2015. This allowed the creation of a full set of linked data RDF maps based on the alignment of ISBD with RDA. These maps were published in the RDA Registry ([http://www.rdaregistry.info/Maps/#isbdrda](http://www.rdaregistry.info/Maps/#isbdrda)) in October 2015. The maps from RDA to ISBD require the completion of the alignment of RDA elements with ISBD elements.

The ISBDLDSG continues to develop an alignment between the ISBD and FRBR element sets which is scheduled for completion by the end of 2015. A separate alignment will be developed with the FRBR-LRM after its final version is approved.


A final draft of *Guidelines for use of ISBD as linked data* is expected to be completed by the end of 2015.

ISBDRG published a report on a survey of the use of ISBD and future expectations ([http://www.ifla.org/publications/node/9560?og=628](http://www.ifla.org/publications/node/9560?og=628)) in August 2015. This is part of the preparation for a review of ISBD, to start in 2016. Further discussion took place on the relationship between ISBD and RDA. As a result the IFLA Cataloguing Section was asked, and agreed, to prepare a document showing the relationships between IFLA’s bibliographic standards.

The representative of the ISBDRG on the JSC RDA/ONIX Framework Working Group is Mirna Willer. The RDF maps from ISBD content and carrier types to the Framework were published in the RDA Registry ([http://www.rdaregistry.info/Maps/#rofisbd](http://www.rdaregistry.info/Maps/#rofisbd)) in June 2015, along with the relevant alignments. The ISBDLDSG agreed to develop a
namespace for compound ISBD content and carrier types aligned with the Framework base content and carrier categories.

Submitted by: Gordon Dunsire, JSC Chair, for JSC liaison to ISBD Review Group
Date: 20 October 2015
2015 report of the JSC liaison to the ISSN International Centre

The JSC liaison arranged an ad hoc visit in December 2014 to the ISSN International Centre in Paris, France, with the Chair of the ISBD Review Group, to meet the new Director Gaëlle Bequet and discuss continuing harmonization of RDA, ISBD, and ISSN.

An updated version of ISSN Manual was published in January 2015. It did not include the proposed change of wording for mode of issuance, submitted as 6JSC/ISSN/5.

ISSNIC agreed a Protocol between the JSC and the ISSN International Centre, published as 6JSC/Chair/22 in June 2015.

ISSNIC accepted the invitation to attend the JSC 2015 meeting in Edinburgh for the session on serials, and will be represented by Clément Oury.

Submitted by: Gordon Dunsire, JSC liaison to ISSN International Centre
Date: 20 October 2015
2015 report of the JSC liaison to ONIX

I had a brief, informal meeting with Graham Bell (Editeur) at which we discussed the idea of an RDA Application Profile for ONIX. Graham is interested, but I have not had time to take it forward.

Submitted by: Alan Danskin, JSC liaison to ONIX
Date: 19 October 2015