

Core: Leadership, Infrastructure, Futures
(A division of the American Library Association)
Metadata and Collections Section
Committee on Cataloging: Description and Access

**Minutes of the meeting held at the
2024 ALA Annual Conference in San Diego, California
June 29 & July 1, 2024**

Members present:

Amanda K. Sprochi, Chair
Kathy Glennan, Vice-Chair
Amanda L. Ros, Past-Chair
Mary A. Burns
Brian Patrick Clark
Erin Grant
Jeanette Norris
Karl Pettitt
Amanda Zhishan Xu
Richard Guajardo, Webmaster
Charlotte L. Cotter, Intern

North American RDA Committee Representatives present:

Robert L. Maxwell, NARDAC
Adam L. Schiff, NARDAC

Ex-officio representatives present:

Melanie Polutta, LC
Kate James, OCLC
Hank Young, PCC (represented by Honor Moody)

ALA Liaisons present:

Alyssa Koclanes, ACRL (present 7/1)
Laura Doublet, ACRL-RBMS (present 6/29)
Jia Xu, CC:AAM
Sharolyn Swenson, CRCC
Cate Kellett, GODORT
Timothy Ryan Mendenhall, LC Romanization Table Review Board
Robert L. Maxwell, LC Romanization Table Review Board
Min Zhang, MAGIRT (present 6/29)
Timothy Ryan Mendenhall, MIG
Daniel Jergovic, SAC

Non-ALA Liaisons present:

Ryan Tamares, AALL

Diane Napert, ARSC (6/29)

Thomas M. Dousa, CLA

John F. Myers, MAC

Chelsea Hoover, MusLA

Kelley McGrath, OLAC (represented by Laura McElfresh)

Rebecca Wiederhold, SAA

Notes:

- I. The minutes do not necessarily record discussions in the order in which they occurred. Material may have been rearranged to collocate items related to specific topics for clarity.
- II. While recordings of the CC:DA meetings were made, the transcription process is laborious. Only in some cases are exact quotes included.
- III. In CC:DA minutes, a “vote of the Committee” indicates a poll of the actual voting members rather than of representatives/liaisons of particular agencies or groups. These votes are a formal representation of Committee views. The Chair rarely votes except to break a tie. The term “straw vote” indicates a poll of the ALA and other organizational representatives/liaisons to CC:DA who are present. Such votes are advisory and are not binding upon the Committee. Where no vote totals are recorded, and a CC:DA position is stated, the position has been determined by consensus.
- IV. In CC:DA minutes, the term “members” is used to apply to both voting and nonvoting appointees to the Committee. Where a distinction is necessary, the terms “voting members” and “liaisons” are used.
- V. Abbreviations and terms used in these minutes include:

3R Project = RDA Toolkit Restructure and Redesign Project**AALL** = American Association of Law Libraries**AAP** = Authorized access point**ABA** = LC Acquisitions and Bibliographic Access Directorate**ACRL** = Association of College and Research Libraries**AFOS** = Acquisitions, Fiscal, Overseas, and Support Division**AJL** = Association of Jewish Libraries**ALA** = American Library Association**ALAIR** = American Library Association Institutional Repository**ALCTS** = Association for Library Collections & Technical Services [Historical use only]**AP** = Application profile

ARLIS/NA = Art Libraries Society of North America
ARSC = Association for Recorded Sound Collections
Atla = American Theological Library Association
BIBCO = Monographic Bibliographic Record Program (PCC)
BIBFRAME = Bibliographic Framework Initiative
BIG = BIBFRAME Interoperability Group
BSR = BIBCO Standard Record
CC:AAM = Core/Metadata and Collections Section/Committee on Cataloging: Asian and African Materials
CC:CYM = Core/Metadata and Collections Section/Committee on Cataloging: Children's and Youth Materials
CC:DA = Core/Metadata and Collections Section/Committee on Cataloging: Description and Access
CCC = Canadian Committee on Cataloguing
CEAL = Council on East Asian Libraries
CIP = Cataloging in Publication
CLA = Catholic Library Association
Core = merged division including ALCTS, LITA, and LLAMA [not an abbreviation]
CRCC = Core/Continuing Resources Cataloging Committee
CSM = Classification and Shelflisting Manual
CSR = CONSER Standard Record
CYAC = Children's Literature and Young Adults Cataloging
DCMI = Dublin Core Metadata Initiative
DCRM(B) = Descriptive Cataloging of Rare Materials (Books)
DCRM(C) = Descriptive Cataloging of Rare Materials (Cartographic)
DCRMR = Descriptive Cataloging of RDA Materials (RDA Edition)
EURIG = European RDA Interest Group
Folio = See LCAP
FRBR = IFLA's Functional Requirements for Bibliographic Records
FRBRoo = FRBR-object-oriented
GODORT = ALA/Government Documents Round Table
ICP = International Cataloging Principles
IFLA = International Federation of Library Associations and Institutions
IFLA-LRM = IFLA-Library Reference Model
LRMoo = LRM-object-oriented (formerly FRBRoo)
ISBD = International Standard Bibliographic Description
ISBDM = International Standard Bibliographic Description for Manifestation
ISBN = International Standard Book Number
ISNI = International Standard Name Identifier
ISSN = International Standard Serial Number
LC = Library of Congress
LCAP = Library Collections Access Platform (a.k.a. Folio, LC's ILS)
LC/NAF = LC/NACO Authority File
LC-PCC PSs = Library of Congress Policy Statements

LCDGT = Library of Congress Demographic Genre Terms
LCGFT = Library of Congress Genre/Form Terms
LCMPT = Library of Congress Medium of Performance Thesaurus
LCSH = Library of Congress Subject Headings
MAC = MARC Advisory Committee
MAGIRT = Map and Geospatial Information Round Table
MARC = Machine-Readable Cataloging
MedLA = Medical Library Association
MGD = Metadata Guidance Documentation
MIG = CORE/Metadata Interest Group
MulDiCat = IFLA's Multilingual Dictionary of Cataloguing Terms and Concepts
MusLA = Music Library Association
NAR = Name Authority Record
NARDAC = North American RDA Committee
NASIG = North American Serials Interest Group
NHP = Non-human personage
NISO = National Information Standards Organization
OCR = Optical Character Recognition
OLAC = On-line Audiovisual Catalogers
OMR = Open Metadata Registry
ORDAC = Oceania RDA Committee
PCC = Program for Cooperative Cataloging
PoCo = PCC Policy Committee
PSD = Policy and Standards Division of the Library of Congress
RBMS = ACRL/Rare Books and Manuscripts Section
RBMS-BSC = ACRL Rare Books and Manuscripts Section, Bibliographic Standards Committee
PTCP = Policy, Training, and Cooperative Programs Division
RSC = RDA Steering Committee
RDA = Resource Description and Access
RDF = Resource Description Framework
RUSA = Reference and User Services Association
SAA = Society of American Archivists
SAC = Core/CCS/Subject Analysis Committee
SCA = PCC Standing Committee on Applications
SCS = PCC Standing Committee on Standards
SCT = PCC Standing Committee on Training
SES = String encoding scheme
SHM = Subject Heading Manual
SLA = Special Libraries Association
URI = Uniform Resource Identifier
VES = Vocabulary encoding scheme
WEMI = Work/Expression/Manifestation/Item, the FRBR group 1 entities
WCAG = Web Content Accessibility Guidelines

**Find other abbreviations at: <http://www.ala.org/tools/topics/acronyms>*

Saturday, June 29, 2024, 1:00-4:00 p.m.

Marriott Marquis, Marina Salon E

1627. Welcome and opening remarks: Chair

Amanda Sprochi, **Chair**, called the meeting to order at **1:00 p.m.** She welcomed voting members, liaisons, representatives, and visitors.

1628. Introduction of members, liaisons, and representatives: Group

The **Chair** invited committee members, liaisons, and representatives to initial a roster sheet and audience members to sign a separate attendance sheet. The **Chair** invited committee members, liaisons, and representatives to introduce themselves.

1629. Adoption of agenda: Chair

The **Chair** added one change: **Mendenhall** will be reporting on the romanization tables. His report will be added into the agenda when there is time.

The **Chair** invited a motion to adopt the agenda as revised. **Glennan** moved to adopt the agenda as revised; seconded by **Ros**. Motion carried unanimously.

1630. Approval of minutes of 2024 Midwinter Virtual Meeting: Chair

[[CC:DA/M/1605-1626](#)]

The **Chair** asked for corrections to the meeting minutes. There were none. However, a number of changes had been submitted electronically prior to the meeting. The **Chair** invited a motion to accept the minutes as corrected. **Glennan** moved to accept the minutes as corrected; seconded by **Burns**. Motion carried unanimously.

1631. Report from the Chair [[CC:DA/Chair/2023-2024/4](#)]

The **Chair** reviewed highlights from the Chair's Report for February 2024-June 2024. The full report is available online in ALAIR: <https://hdl.handle.net/11213/22615>.

- The **Chair** reiterated the charge of CC:DA.
- The **Chair** has continued the recruitment of liaisons and representatives from ALA units and non-ALA organizations who have vacancies.
 - Continued to reach out to the Public Library Association and the Medical Library Association, both of which have traditionally had liaisons on CC:DA. However, there has been no response.
 - IFLA has traditionally had a representative on CC:DA; however, that representative has retired. IFLA is currently reorganizing its procedures for liaison and committee recruitment and appointment. CC:DA will keep contacting them

and ideally there will be a representative from IFLA soon.

- CYM is in limbo due to lack of leadership. CC:DA has a current representative member who is rotating off. The **Chair** is waiting to see how the situation resolves itself before CC:DA finds someone to fill that position if CYM remains constituted.
- The **Chair** recognized the members who will be rotating off or moving to other positions after ALA Annual.
- The **Chair** recognized the members who will be joining CC:DA at the conclusion of ALA Annual and welcomed them to the committee.
- CC:DA has responded to requests for comments by the RSC:
 - RDA/ORDAC/2024/1
 - RDA/TechnicalWG/2024/1
- Task Forces
 - CC:DA created one new task force, the Task Force to Review ISBDM with **Glennan** as Chair of the committee. The Task Force will provide a report during this meeting.
 - CC:DA Procedures Task Force finished their work. The new procedures document was voted on by CC:DA membership and then sent to senior leadership who ratified it.
 - The Documents Online Repository Task Force, chaired by **Guajardo**, has continued their work and will provide a report during the meeting.
 - The Task Force on Personal Names in Official RDA also continues its work and is expected to provide a report during the meeting.

1632. Report of the CC:DA webmaster: **Guajardo**

Guajardo reported on his work as CC:DA webmaster.

- **Guajardo** and others continue work on an ongoing project to migrate CC:DA's old WordPress blog to an updated platform maintained by ALA.
- The blog contains valuable information that CC:DA would like to have access to for permanent retention.
- One of the urgencies for the data migration is the inability to access the site during some periods. It disappears sometimes during holidays, weekends, or late at night and reappears after some unknown interval.
- Specifically, CC:DA has asked the Core Web Committee to migrate CC:DA's existing WordPress platform to an updated platform maintained by ALA.
- This has not yet happened; **Guajardo** anticipates that this will hopefully happen in the next year.
- CC:DA has a liaison to the Core Web Committee, however, she is leaving the committee, and the project will mostly fall to the current Chair. **Guajardo** hopes that person will continue as past Chair; otherwise, CC:DA will have to regroup on this front.

1633. Report of the MAC Representative: **Myers** [[CC:DA/MAC/2024/2](#)]

The full report is available online in ALAIR: <https://hdl.handle.net/11213/22799>. **Myers**

addressed highlights of the report of interest to this committee.

- One proposal and six discussion papers were taken up.
 - The proposal passed, based on a previous discussion paper.
 - One of the discussion papers was moved for fast-tracking; the other five will return as proposals.
- On a personal note:
 - **Myers** will be rotating off of CC:DA as Mac Liaison after ALA Annual 2025.
 - Seeking interest for MAC representative to CC:DA - interested parties should reach out to **Myers**.

1634. Report from the Library of Congress Representative: Polutta [[CC:DA/LC/2024/2](#)]

The full report is available online in ALAIR: <https://hdl.handle.net/11213/22798>. **Polutta** addressed highlights of the report of interest to this committee.

- PTCP hired a Program Specialist, Sarah Kosteletzky, who is in a 3-year position leading a project to evaluate and adjust subject headings for Indigenous peoples, with a primary focus on headings of Indians of North America and subject headings under that.
- PTCP also has a temporary Junior Fellow, Alaina Economus, who is assisting Heidy Berthoud with classification revisions related to Slavic materials.
 - Currently working on Kyivan Rus and the Baltic states.
- Description Cataloging Manual has been updated:
 - To reflect corrections that are needed to Family Name Authority Records as part of implementation of change in policy to allow name authority records for family names as subject access points.
 - 022 (ISSN) implementation that is moving forward with new field 023.
 - 376 (Family Information) added instruction not to use \$d.
- Update in Classification and Shelflisting Manual:
 - Allowing implementation of 053 classification number to be used in name authority records for literary authors of juvenile materials.
 - This is fully published and ready to be implemented.
- ISSN updates:
 - There are ongoing improvements coming for the ISSN Uplink system.
 - LC is continuing the ongoing international cooperative music bibliographical projects with MusLA, focused on getting more serials the ISSNs that they need to have.
 - 023 implementation for Cluster ISSN concept.
- Romanization:
 - MARC discussion paper 2024-DP11 re: recording transliteration standards in data provenance subfields was discussed and is open for more input.
- BIBFRAME working on development for MARVA:
 - Development is ongoing, however, these developments are not ready to be publicly announced.
- LCAP:
 - The Acquisitions module will be implemented first, this fall, with Metadata to follow next year.

- Exact timelines are not clear.
- RDA:
 - LC has continued to make updates to policy statements and MGDs based on the report of the PCC RDA Test Task Group -
 - Most policy statement updates are finalized.
 - Ones that are remaining have to do with further updates to boilerplate language and with updates or additions of links to MGDs.
 - Current work on the MGDs is an ongoing process; LC does not have to wait for the RDA update cycle and is making changes and uploading them as they are happening. At the end of the MGDs document, an update history will indicate the date of the most recent update and a summary of the changes.
 - String encoding scheme MGDs:
 - Seven are ready and waiting to be uploaded, and then added policy statements will be added to link to them.
 - Three are still being worked on.
- LCSH:
 - LC has made a change to schedule for subject editorial meetings -
 - However, they are having discussions to address feedback received on lack of enthusiasm for that change.
 - Change in policy for family name NARs as subject access points has been implemented - this includes the full update of H 1631 (Genealogy and Family Names) and the creation of H 1631.5 (Family Names: Headings and References).
 - Change from the Music Division for the music form subdivision. H1610 (Musical Compositions) List 1 can be applied to all headings for forms of music regardless of whether they mention a medium of performance.
 - **Polutta** referred participants to her report for the list of special lists that have been processed - LC continues to receive proposals for changes in subject authority records.
 - Trying to implement a process to handle projects in a more efficient manner due to volume and speed of projects coming in.
- LCC:
 - Project to revise classification schedules for Former Soviet republics and related history section impacts continues with focus on Kyivan Rus.
 - Project to relocate and expand classification of comics by other regions or countries is close to being ready.
 - These projects take a long time to add to the ClassWeb system because they have to edit them one by one; one of their requests is to be able to do these as batch edits, which would significantly speed up this process.
 - Caption updates related to already existing subject headings are in process.
- LCGFT:
 - New instruction sheet published on Cartographic Materials, J 215.
 - LC has developed self-paced internal training for LC catalogers to use LCGFT. Catalogers have been asked to take the training and are now being encouraged to use them.
 - Working on Genre terms for Dance as a result of another project in classification

and subject headings.

- LCDGT
 - Special list put forward to move toward using post-coordination with a combination of “Family member of [demographic group]” and [Type of family member] to simplify the number of headings that can be proposed.
 - Recent discussion on moving towards implementation of LCDGT for age-range categories for juvenile materials (instead of adding new form subdivisions for different age ranges).
- CYAC
 - Continues with its revision of automatically loaded headings - this is going to take a long time.
 - A current project is completing a Fiction memo.
 - CYAC went forward with the change of “Racially mixed people” to “Multiracial people.”

The **Chair** asked whether there was any news on the application profiles.

Polutta answered that there has not really been any news. She said the PCC task force has been working on them and that LC was waiting on the outcome of that work themselves.

Honor Moody, Metadata Creation Manager at Harvard University and Co-Chair of the SCS, said she will be sure to add an update on the status of the Metadata Application Profile if one is not already in **Young**’s formal report.

Mark Scharff, Music and Special Collections Catalog Librarian at the Washington University of St. Louis University Libraries, asked about the training that was mentioned for LCGFT, specifically if **Polutta** had any notion of how that may tie into LC’s decision to get away from using LCSH for form-genre headings.

Polutta answered that while they do not have a fully formed plan for getting rid of form-genre subdivisions, they are moving in that direction; having training was always a preliminary step before asking catalogers to use LCGFT. They are looking into how to move forward on this.

Scharff asked whether it was too early to say that there was a calendar on this topic, to which **Polutta** replied that it is too early for a calendar.

Zhang asked for clarification on LCGFT instruction: when LC mentions LCGFT instruction, would that mainly be for book catalogers? Because we [map and cartographic materials catalogers] have been using that.

Polutta answered that, yes, the new training is mainly for book catalogers. She acknowledged that map catalogers have already been using LCGFT, as well as music. Motion pictures have been wanting to, but **Polutta** is not sure if they have. LC is aware that they have been implementing and welcomes feedback.

The **Chair** asked whether the trainings [for LCGFT] that LC has developed will be up on the website for LCGFT.

Polutta answered that, currently, those trainings are specifically targeted internally for LC catalogers. Her understanding is that once catalogers have gone through it, they will have catalogers fill out a survey so that the trainings can be improved. LC does want to develop training for an external audience, but it will be different from trainings currently being used by LC.

The **Chair** expressed that having LC trainings for an external audience would be great. She added, “if you’re not using genre headings, you should be,” with which **Polutta** concurred, adding, “we want you to be using genre form headings.”

Schiff suggested that if LC is doing the training for external audiences, they might partner with other agencies or groups like PCC which have been implementing these for a long time.

Maxwell brought up the topic of juvenile / children’s materials, and asked whether recent subject heading changes are a preliminary step in getting rid of form subdivisions and instead using 385.

Polutta answered that, yes, this is part of the move toward getting rid of form subdivisions. Getting rid of form subdivisions is going to be one big project that has not been defined clearly enough yet to this extent, however this is part of it. For juvenile materials, LC was never going to put a heading for “Juvenile literature” in LCGFT, so to express that need, we need to put it elsewhere. [Field] 385 is the designated place using LCDGT terms, where LC is putting information as to who is the audience.

The **Chair** asked whether she was understanding correctly when saying that, eventually, sometime in the future, instead of using \$v Juvenile material, one would go with a 385 with whatever specific age group that it is intended for.

Polutta said that is correct. LC already has age group terms in LCDGT, such as preteens, children, and if more specific ones are necessary, these can be proposed.

Adam Baron, Head of Metadata Services at UC Berkeley and Chair of PCC RDA Implementation Task Group, said that the PCC participants meeting tomorrow (Sunday, June 30), TJ Kao will be giving an overview of the draft of the Metadata Application Profiles for BSR. There will be a virtual repeat of this meeting in July.

1635. Transliteration report - Timothy Ryan Mendenhall [[CC:DA/ALA LC Romanization Rep/2024/1](#)]

The full report is available online in ALAIR: <https://hdl.handle.net/11213/22800>. **Mendenhall** addressed highlights of the report of interest to this committee.

Earlier this year, the Chair of the Romanization Review Board, Jessalyn Zoom, suggested that a task force be formed to author a discussion paper on how to record transliteration schemes in

MARC. There were two use cases discussed in that paper.

- 1) From SCS, Task Group on Evaluating Non-Latin Script References, which sought to record some sort of code in authority records for variants to indicate transliteration schemes.
- 2) BCP 47 Standard, which can be used to record a number of uses of string or textual data, including language, script, transliteration scheme and other aspects related to text data. This standard is widely deployed in environments, including HTML and RDF; in RDF, BCP 47 is the only permissible standard for documenting language, script, etc. of data.

Mendenhall suggested to Jessalyn Zoom that he give a report on this topic at CC:DA because some of the comments from the community, and specifically during the recent MAC meeting around the discussion paper, suggested that some of the issues would merit being elevated to a broader forum related to RDA; specifically, the British Library suggested that tagging translation and accommodating BCP 47 might be something that perhaps should be discussed by the RSC.

Mendenhall noted that this topic did come up in the past, when data provenance fields were first introduced to MARC Standard. At the time, discussion was inconclusive about how to accommodate transliteration in provenance data. The compromise reached at the time was that it would be recorded using category code source consulted.

In the discussion, **Pat Riva**, who was working on the release of the LRMoo model, which is something of a successor to FRBROO ontology, noted that a specific class for transliteration schemes and the specific relationship to relate a transliteration scheme to nomen has been introduced, but this is not in RDA. So, transliteration is mentioned in RDA, but is not in the framework like it is in the LRMoo model.

One concern raised by the British Library and the Canadian Committee on Metadata is determining where it fits in RDA: is it data provenance or is it something else? Therefore, this might be something for the broader RDA community to think about.

One issue raised in the discussion paper is related to the use of BCP 47 for linked data applications and its possible difficulties in interacting with RDA. For linked data applications, BCP 47 must be used, but it has a syntax for combining what are currently separate elements in RDA: language, script, etc. It is not a simple matter to combine separate data elements into a single BCP tag. Therefore, how BCP 47 in linked data applications could interact with RDA standards is also something the broader RDA community should think about.

The **Chair** asked whether there is anything **Mendenhall** would like CC:DA to do on this topic. Is the right course to be aware of and follow it and then comment as materials are released on this topic?

Mendenhall answered that he did not have anything specific in mind, however, he brought it to CC:DA since the British Library and the Canadians in particular thought that this is something that someone should bring up with RSC.

The **Chair** said that she assumed that the transliteration schemes being used by the British Library are not necessarily the same that we are using.

Maxwell added clarification on what the British Library and others were envisioning, saying that recording transliteration schemes would allow catalogers to indicate that, for instance, this 400 cross-reference field in the authority file is in Wade-Giles and the other is in pinyin.

The **Chair** underscored what **Maxwell** had said, saying that one of the use cases would be for the 400 cross-reference fields in authority records to label which transliteration scheme is being used. This could be useful for catalogers who are less familiar with the particular languages and transliteration schemes. The **Chair** expressed that if anyone had any comments about this or the discussion paper, they should direct them to **Mendenhall** so that he can bring them to the task force.

Schiff pointed out another use case for recording transliteration schemes: there is sometimes copy from OCLC from agencies that do not use RDA or ALA-LC romanization, and if there was a way for them to specify which romanization scheme they are using, it may be easy to run some kind of conversion to ALA-LC romanization, such that a cataloger who may not be able to read that language may still be able to generate a bib record.

Additionally, **Schiff** put out the question of whether CC:DA or any of its members would be interested in participating in writing the proposal that will go to the MARC Advisory Committee.

Mendenhall mentioned that the group that authored the discussion paper will be drafting a formal proposal, but they have some time to work on it - looking at September to December of this year. They had a short turnaround time for this particular paper. They did get input from assorted groups and individuals, but it would appreciate any other input or expertise.

James cited Riva's previous comment regarding transliteration scheme modeling in LRMoo, and raised a question about the nature of the nomens and relationships associated with transliteration schemes. **James** also brought up the "scheme of nomen," which is already in RDA.

Mendenhall said that he can't speak so much to clarify that; he has not looked at LRMoo yet himself. **Mendenhall** said he knows that in LRMoo, there is a class for transliteration scheme and a relationship element to relate a transliteration scheme to a nomen, but he does not want to say more. **Mendenhall** referred to a link to the recording where Riva gives those comments. The scheme of nomen is brought up in British Library comments. That was discussed at an earlier phase when the data provenance elements first came into MARC a couple of years ago. The discussion of whether the transliteration scheme could fall into the concept of nomen was inconclusive.

Mark Scharff, from the Washington University of St. Louis, asked about how cases in which catalogers may not know what the transliteration scheme is will be accounted for. Transliterations that show up as references in authority records sometimes simply come from the New York Times, and catalogers may not know what that transliteration scheme is. How is that accounted

for / how will that be accounted for?

Mendenhall answered that if this effort became implemented, it would be more likely to be implemented in linked data environments. He said that in tools like Sinopia, there is a widget built in that allows users to select from different schemes, and there may be an option for standard schemes used by, say, the New York Times. But if the transliteration scheme is truly informal, he is not sure how to account for that. One could always omit that information, or **Mendenhall** was unsure whether there possibly was a valid code for transliteration scheme unknown in BCP 47. In any event, communities will have to develop practices to deal with this.

Jumping back to the use cases, **Mendenhall** added that another possibly imminent use case is as it relates to MARC: in the next year, there will be a large volume of MARC converted from BIBFRAME (BIBFRAME first cataloging), and, while strictly speaking, one does not need transliteration scheme data for MARC to work, it might be good to keep it if it is there.

Maxwell, speaking in his capacity as a NARDAC representative, provided a reminder about how proposed changes to RDA get to the RSC through NARDAC. He said that the way things get to RSC is not that NARDAC goes to RSC, but that NARDAC's constituents make the proposal. Therefore, if there is a feeling that, because of this, there are changes that need to be made to RDA, NARDAC needs a proposal.

The **Chair** asked **Mendenhall** whether the task force expects to have a whitepaper or proposal come out for CC:DA to respond to or is this something CC:DA needs to develop and send up to the RSC.

Mendenhall said that initially there will be a MARC proposal resulting from this effort, but if this community feels changes are necessary to RDA, then CC:DA would have to submit a proposal to NARDAC.

Glennan said that there should be discussions, at least at some level, with the RSC Technical Working Group. This committee would be ill advised to proceed with something that we think would have an impact on RDA in a technical way without running it by that technical group to see what their feedback is. Getting their feedback would be important before the committee invests a lot of time and effort into something not technically compatible with RDA.

Mendenhall agreed that **Glennan**'s response sounded reasonable. He said that perhaps a good next step, possibly during the drafting process for the MARC proposal, would be to reach out to the RSC Technical Working Group to present comments received and how they relate to RDA and to ask whether they think anything more should be done.

The **Chair** commented that to implement any of this in RDA, there needs to be a proposal to make it compatible or create some guidance or rules such that RDA covers this area. However, she expressed that because the Romanization Table Review Board is working on it, she does not know if CC:DA necessarily wants to step in before there is a clear sense of what the proposal will be.

Schiff countered that they do know - there will be two new codes in the proposal to accommodate the two primary use cases outlined in the original discussion paper, one of which is to accommodate pure tagging of transliteration schemes, and the other would be to accommodate BCP 47 tags.

The **Chair** asked whether there is already a schema or list of codes for transliteration schemes out there or whether that would need to be developed.

Mendenhall answered that BCP 47 uses a standardized list of codes for translation tables. Kevin Ford at LC gave a presentation to the Romanization Table Review Board that went into some of these details. There is a process to get new codes added, but no one, including Ford, is entirely sure of what that entails. There is an agency that you have to run it through, but the specifics of how much labor that entails and turnaround time are less clear.

Schiff added that there is a MARC code list for transliteration schemes, however, it currently has only two entries right now, for ALA-LC and Wade-Giles. He has submitted a list of schemes asking LC to establish codes, but they are still discussing it and the codes have not yet been approved. He surmised it may be because LC is pushing for BCP 47 rather than MARC codes.

The **Chair** said she is thinking ahead to how one would formulate rules in RDA - usually there would be a code list or something to pick from or use. She expressed her inclination to wait until the Romanization Table Review Board writes their proposal to MARC, and then use that for CC:DA to make a proposal for changes to RDA to accommodate those new potential elements. She asked whether this makes sense as a working process.

Mendenhall concurred, adding the caveat that **Glennan** mentioned, namely, the need to run anything planned by the RSC Technical Working Group first before any labor is done there.

In response to the **Chair** asking whether a task force needs to be drawn or whether CC:DA should wait until a proposal comes out, **Mendenhall** said that one possibility is to wait until the group drafts the proposal and opens it up / shares it with CC:DA in draft form to get comments from this community as well as hear from the RSC Technical Working Group. At this point, once the RSC Technical Working Group has reviewed the issue, maybe a task force could be created.

Myers commented on the nomen to nomen concern that **Pat Riva** had mentioned. According to his notes, **Riva** mentioned that transliteration is not explicit in the LRM, but as discussed, the LRMoo version 1 has a more detailed treatment of transliteration, so **Myers** thinks the viability of a change to RDA may hinge on degree to which the RSC is amenable to the impact or influence of LRMoo versus the original LRM. If RDA is strictly tied to LRM, then a change needs to happen in LRM before we can have a change to RDA, unless RSC is flexible with which flavor of LRM to work with, in which case, it seems like there may be a more viable path.

Maxwell said that there are things that are in RDA that are not in LRM.

The **Chair** added that, in her understanding, RDA is an extensible instance of LRM - as long as RDA does not conflict with LRM, then it is fine.

Schiff pointed out that MARC is not tied directly to LRM, either, so if there are use cases for fields or subfields or elements in MARC that don't correspond to RDA, that is also fine.

James agreed with **Maxwell** about the issue of compatibility. She thinks that even though there is not an explicit element for transliteration scheme, scheme of nomen and source consulted both could accommodate the idea of a transliteration scheme in RDA. **James** expressed her view that the world can live without a proposal in RDA, while making this happen in MARC.

The **Chair** reiterated that her inclination was to wait to see the proposal and then possibly craft a response at that point. Is accommodating in MARC enough or do we feel RDA also needs an amendment or addition? She asked whether that sounds reasonable as a course of action.

Honor Moody, Metadata Creation Manager at Harvard University and Co-Chair of the SCS, expressed confusion, because in RDA there is the instruction for recording a transcription standard used for metadata, where it instructs catalogers to record a metadata work as an instance of work, and to record a transcription standard that is used for the metadata work as a work-related manifestation of work. She said she is confused what change would be proposed for RDA in addition to that and how that would work.

Schiff pointed out that the whole idea of possibly making changes to RDA and involving the RSC came from the British Library; they thought that transcription was covered under that instruction.

Mendenhall agreed with **Schiff** and added that he thought the authors of this paper did not want to tread into RDA waters; it was only because it came up from major constituencies that the group thought it was worth raising to the broader CC:DA community.

The **Chair** said that this is another reason why it would be good to see what the task force comes up with first and then to have CC:DA to review it and run it by the Technical Working Group. The Technical Working Group may say that a certain instruction from RDA already covers that, or they may say that RDA doesn't cover that and that it is a gap that needs to be filled. The **Chair** expressed a desire not to form a task force simply to spin their wheels. Once the proposal has been released, CC:DA can either discuss it during a meeting or virtually to see if anything needs to be addressed.

Myers noted that the preliminary intention for the scheduling of the MARC Advisory Committee places it after whatever happens in wintertime for ALA, so that is looking like the last week of January 2025. This is something to keep in mind in terms of aligning with CC:DA meetings.

The **Chair** responded that that was why CC:DA may have to craft a response in the interim virtually based on when the preliminary draft comes out.

Mendenhall said they will probably have something drafted well ahead of the December-ish deadline. Returning to **Moody's** comments, **Mendenhall** shared his thoughts about how the Technical Working Group and other higher level groups might react. His biggest question mark was BCP 47, since it combines things that are treated separately in RDA, which possibly may need to be addressed - or possibly not. He said he could see it going either way.

The **Chair** reiterated that the uncertainty here is why running it through the Technical Working Group first is a good idea.

Shifting gears, the **Chair** wanted to bring everyone's attention to the RSC's request for response to a short proposal.

Maxwell said that the RSC Religions Working Group put forward a short proposal, which is to be discussed at RDA next month. **Maxwell** asked CC:DA to submit comments on that within a week or two. Then, the RSC Extent Working Group has a rather complicated proposal; however, that is not set to be discussed until October, so there is some time on that.

Schiff added that the religion proposal really just replaces "church etc." with "place of worship," so he believes it will not be too controversial.

Renate Behrens, Chair of the RSC, added a couple of comments on the RSC proposals being discussed and proposals to the RSC in general:

- The Religions proposal seems to be a small one (although one never knows in the cataloging community).
- She stated that the RSC will never push something through if the community needs more discussion or time.
- For the Extent Working Group proposal, the RSC will take a step-by-step procedure. The Extent Working Group Chair, Thomas Brenndorfer, has just provided the draft of the proposal. He will be present at the public session, Tuesday, second week of July to inform everyone about the content of the proposal. However, no decision will be made. First, the RSC will have the final proposal from the Extent Working Group for their November meeting. The RSC has talked extensively with Brenndorfer, Chair of the Extent Working Group, about how communities need time to talk about this, because this will have a big impact on practical cataloging. Another reason that they are implementing the step-by-step process is because the Working Group would like to wait to ISBDM draft.
- She agreed that if the community feels that RDA will have to be impacted, it would make sense to be in touch with the RSC Technical Working Group, through the RSC Secretary.

The **Chair** outlined her plan to upload the RSC Religions proposal up on Connect and asked CC:DA members to take a look at it and send comments on a short turnaround, so that CC:DA can provide comments to NARDAC. The Extent Working Group proposal has also been released, so she will put that proposal up too on Connect for review, but this CC:DA has until the November RSC meeting to submit a response.

[[CC:DA/TF/Digital Online Repository/4](#) and [CC:DA/TF/Digital Online Repository/5](#)]

The full report is available online in ALAIR: <https://hdl.handle.net/11213/22473>. **Guajardo** addressed highlights of the report.

- The Task Force met with ALA Archivist and ALA Archives Programs Officer who gave a tour of the ALAIR and discussed questions and issues about the work and the extent of the work with the Task Force.
- The Documents Online Repository Task Force work is in conjunction / in parallel to what **Guajardo** and others are working on with regards to the CC:DA blog.
- The Core Web Committee put together a sample LibGuides version of CC:DA website for reference, however, the Task Force decided they were interested in a more long-term solution.
- In locating and retrieving past CC:DA documents, the Task Force relied heavily on the Internet Archive, because the documents were not formally live anywhere else.
- The Task Force decided on a two-pronged approach:
 - Work with the Core Web Committee to get the blog migrated due to the unreliability of the current platform and to archive documents currently on the blog.
 - Work with the documents formerly maintained by John Attig on the Pennsylvania State University website.
- Staff at ALAIR put together a landing page for CC:DA and assigned space for archiving of CC:DA collections.
- The Task Force devised a list of categories, or as ALAIR calls them “collections,” within the CC:DA site to organize documents. This also provided a good structure for keeping track of which documents were already archived and which ones remained. They started with Agendas and moved down the list and are currently at Task Force Documents.
 - Agendas
 - Chair documents
 - Committee Operations Documents
 - Including the rosters. The Task Force went back as far as they could for the rosters, however, for the early period there were no individual annual rosters.
 - They do have, however, a chronological / historical list of all CC:DA members back to its inception.
 - Discussion support documents
 - Documents from CC:DA Liaisons / Affiliated Organizations / Individuals
 - JSC/RSC/NARDAC Representative Documents
 - Minutes
 - Task Force Documents
 - Uncategorized documents
- The Uncategorized documents category currently does not have any documents, but the Task Force knows they are there. This category serves as a catch-all: if nothing else, a place to park documents if it could not be determined what the document number should be or was or where it might be best located.
- As of time **Guajardo** compiled the report, 750 documents had been added to ALAIR.

- **Glennan** provided an updated number at 796.
- Their estimate is that there are at least 300 remaining to be located.
- The Task Force has attempted to locate documents that it currently does not have, including some at UC Santa Barbara that were with the Confluence site, however, they did not have any luck there.
- The Task Force has also reached out to former CC:DA members in hopes that they may have some of these documents that predated the first CC:DA website.
- From what the Task Force can tell, John Attig was appointed in 1997, and so the Task Force has been assuming there was no web presence prior to that, but certainly they know there were documents somewhere. Some of those Attig may have added himself afterward, but so far that is not something the Task Force has been able to determine.
- For documents that predate the CC:DA website, the Task Force intended to explore the documents that are on deposit with the ALA print / paper archives, using finding aids to help narrow down the search. They may also consult with the ALA Archivist on what specifically is within the boxes or folders that contain print material on CC:DA prior to its web presence. The Task Force is not sure what is there or whether it is material CC:DA wants to archive, but they do want to take a look in order to make that determination.
- The Task Force has not attempted to be comprehensive in entering metadata for each document at this point. It will be a work in progress, and CC:DA can enhance the metadata further down the line - possibly the work of another task force. The goal of this Task Force, however, was to get documents on ALAIR as soon as possible and, in particular, to prevent loss of access to anything on the blog.
- **Guajardo** referred to the categories and said that CC:DA members could view what documents have already been uploaded by visiting each category.
- Document numbering best practices:
 - Early on, the Task Force decided to use the title field to provide an easy access point for CC:DA document number.
 - The Task Force found documents that did not have a CC:DA number. This brought up questions such as: What are the rules for document numbering? Are they written down? The Task Force determined that as far as known, CC:DA does not have written rules for document numbering.
 - Therefore, the Task Force put together a guide to CC:DA document numbers.

Glennan addressed highlights of the CC:DA Document Numbering Guidelines. The full CC:DA Document Numbering Guidelines are available online in ALAIR:

<https://hdl.handle.net/11213/22461>.

- The Task Force has sent the guidelines to John Attig to see if he had any comments, however, at the time of the meeting, they had not received a reply.
- Essentially, they were putting on paper what had been in Attig's head based on the evidence of what was already in the repository.
- Numbers 1 through 5 of the guidelines are based on numbering used by the RSC currently and the JSC previously.
- The Task Force used this document as a check also when assigning numbering to

documents that lacked numbering.

- In ALAIR, the title is made up of: the CC:DA document number followed by space followed by what they could find as the title of the document.
- ALAIR details:
 - Uses Dublin Core.
 - The documents uploaded get small thumbnail images.
 - The documents uploaded are OCR-ed, therefore, there is pretty significant retrieval on documents.
 - The RSC also uses ALAIR as their repository.
 - CC:DA is one of three metadata sections using ALAIR as their repository (including SAC).
- Assume that CC:DA will continue to use these document numbering guidelines, but at some point, CC:DA needs to approve them.

The **Chair** asked anyone who has or is in contact with those who have CC:DA documents to get in touch with the Task Force.

1637. CC:DA Procedures Task Force: Myers [[CC:DA/Pro/16/2024](#)]

The procedures document is available online in ALAIR: <https://hdl.handle.net/11213/22462>. **Myers** had no additional comments.

The **Chair** provided the following updates:

- After the Task Force finished their work, CC:DA voted on and ratified the CC:DA procedures they drew up, sent the procedures up to CC:DA's parent section, Core Metadata and Collections Section who approved the new set of procedures. Therefore, CC:DA has a new set of procedures in effect. **Myers** posted the final version to the CC:DA Committee Connect Space, and they are also in the repository on ALAIR.

The **Chair** officially discharged the Task Force.

1638. IFLA ISBD for Manifestation Review Task Force: Glennan [[CC:DA/TF/ISBDM/2](#)]

The full report is available online in ALAIR: <https://hdl.handle.net/11213/22439>. **Glennan** reported on highlights of the report.

- ISBDM without the parentheses (versus ISBD(M) for monographs) is an initiative from IFLA. **Renate Behrens** is Chair of the working group currently overseeing ISBDM development. The project has already been ongoing for a couple of years.
- CC:DA's turnaround for the review of ISBDM is short.
- **Glennan** served as the Chair of the CC:DA Task Force formed in February 2024 to participate in and provide a response to the IFLA ISBDM world-wide review.
- The Task Group met more-or-less monthly, but was unable to begin their work until IFLA had kick off for review in late April.
- The Task Group was charged with preparing a review of the draft, considering the effectiveness of the draft, its conformance to LRM, and any implications for RDA. They

were told to present their preliminary findings at CC:DA at ALA Annual, and the approved CC:DA response is due to IFLA in mid-July. The report is finished as of this meeting and the committee needs to vote this week to confer official CC:DA approval so that **Glennan** and the Task Force can submit the response to IFLA.

- In scope:
 - Observations and recommendations about the functional structure
 - Navigation of the tool
 - Overall content including the entity and element structure
 - Vocabulary and string encoding schemes
 - Examples
- Not in scope: Anything that has already been decided (even if the Task Force did not love it), including:
 - The fact that ISBDM is based on IFLA LRM
 - The removal of the concept of areas of description
 - The lack of structural numbering - it is designed to be online tool without a given structure to approach it
 - That the scope of the document is limited to the manifestation as much as possible
- The Task Force report organized by broad categories:
 - Functionality as an online resource
 - Editorial recommendations
 - Relationship to IFLA LRM - specifically, terminology
 - Value vocabulary recommendations
 - Editorial corrections
- Found aspects that the Task Force liked:
 - The Task Force found the Preliminary Assessment section helpful. **Glennan** said it would be something she would refer people to as they try to understand official RDA - how you approach it, how to decide what one takes into consideration before one begins to put metadata down into a record
 - The linked data diagrams
 - Inclusion layout and content of the element reference boxes
 - Clear and logical layout of element categories
 - Examples cover a variety of format types as well as in different languages and scripts related to resources themselves and the metadata descriptions
 - Inline examples linked to the full examples when they can
- Found aspects to be concerned with:
 - Functionality as online resource -
 - Accessibility issues -
 - Visual presentation of hyperlinks (including highlighted links on same color background)
 - Use of background colors to convey meaning
 - Lack of keyword search - but the developers know this
 - Absence of any kind of numbering system beyond page number, which requires counting paragraphs or boxes to make a specific reference
 - Editorial recommendations -
 - Many of the recommendations focused on the introduction

- Enhance the introduction to explain the scope, how element names are structured, the meaning of the background colors (if they persist), when data can be supplied outside of ISBDM
 - Also adding that the tool is based on RDA - that is not in writing anywhere. If it was based on RDA, then they ought to say that.
- Improve the presentation of element name link hotlinks
- Map LRM to other IFLA standards - to LRM and UNIMARC (and it might be nice to map to non-IFLA standards)
- Map or other information to find content from ISBD Consolidated while recognizing the difficulties of creating such map
- There is as of now a stipulation requiring recording height and width for all printed volumes - but there are no examples of doing so. The group wanted to know what the rationale is for this.
- Relationship to LRM terminology -
 - LRM user tasks referred to in passing, but not explicitly named or included, so they should be included
 - Very awkward to implement ISBD just for manifestation, i.e., in isolation. This is because manifestations do not exist in a vacuum - they have creators, works, and so on and so forth. Therefore, there are elements that are needed, but they are not strictly speaking manifestation elements, so it requires awkward workarounds and has resulted in oddities.
 - Clarify use of the term “Subunit”
 - Add or explain the absence of the LRM-E4-A5 Manifestation / Access Conditions
 - Explain why the term diachronic work is used, since it is not in LRM
 - **Glennan** said that if they clarify that ISBDM is based on RDA, perhaps that would become clear
- Value vocabulary recommendations -
 - Consistent naming convention so the value vocabularies match the usage in the element names
 - Significant concerns with extent of aggregated content value vocabulary, which includes terms that are not only used for aggregates (maps, scores, spoken text)
 - Help users understand the subtle differences between terms in this category and those in the category of content value vocabulary, like spoken word versus spoken text.
 - Strong recommendation to work with music librarians to better model and represent musical resources

Glennan indicated that what she would like out of the discussion would be for CC:DA to approve the report, at least in principle, adding any comments that come out of this discussion.

Polutta mentioned that one of her colleagues at LC is also leading a group of three other catalogers to review and write comments. One of the questions **Polutta** discussed with her colleague the other day is: Is ISBDM adequately covering punctuation in the same way that ISBD

traditionally has been doing? Covering connecting punctuation is not as necessary, however, there is still internal punctuation inside the element that is necessary to convey meaning.

Glennan responded that ISBD is envisioned in two scenarios - linked data and relational databases. There is a lot of flexibility in the examples. **Glennan** said that there is a whole section for string encoding schemes. Some are pretty normal, as what one would expect, such as inverting personal names and putting a comma before the dates and a dash between the dates. The only access point instructions present are for manifestations. Since we are not familiar with creating access points for manifestations, they look odd. In terms of separating elements, one kind of has a choice, but it is always the same separator. So, for instance, there are examples of using a vertical pipe between elements. This would be instead of what we think of as ISBD punctuation in separating the different areas. There are a bunch of choices based on how you want to implement it.

Polutta reiterated that it is not punctuation in between elements that concern her as much, but it is the inside of the elements that concerns her.

James said that **Polutta** might be thinking of no collective title situation, where there is a manifestation with no collective title, so one takes each title and then separates them with space semicolon space.

Polutta also brought up the case of the title and statement of responsibility.

James said that, no, that is not there, but based on presentations that she saw and questions that were asked, ISBD Consolidated has those instructions, and this task group indicated that they thought IFLA would keep ISBD Consolidated with those punctuation instructions available, so there is no reason why people couldn't keep using that - it is just not part of ISBDM.

Polutta then asked whether it would be correct to say that ISBDM is not intended to replace the older ISBD.

Glennan does think that it is intended ultimately to replace ISBD Consolidated, but IFLA is not going to take down the PDF of ISBD Consolidated. **Glennan** provided the example of a place SES - suggested SES for the authorized access point of place related to manifestation: Name of place + (qualifier + : + qualifier), so the example looks exactly like what you would do now. Within an element, ISBDM has suggested encoding schemes that look familiar to **Glennan**.

Polutta clarified that part of what she was trying to get at is whether the community is going to have to develop its own documentation to replace what ISBD Consolidated told us how to do. She said that she sort of saw that the answer was going to be yes. Even the publication statement does not concern her as much, but she is concerned about the standards that are inside name of publisher or place of publication. She pointed to the fact that there was a standard for punctuation inside elements and that punctuation conveyed meaning; she asked whether that has gone away.

James said what **Polutta** was talking about in terms of the place of publication with a comma between city and country didn't come from ISBD, but rather is regular punctuation conventions that can be applied. The square brackets are standard for conveying information from outside the

source of information and are not necessarily from ISBD either. For things like the no collective title situation, instead of very specific instructions about a semicolon, it will say something like if there are no words or phrases that can join the titles, add standard punctuation between the titles. **James** said that there is nothing that is preventing anyone from continuing to use the semicolon. It is ultimately up to IFLA what will happen to ISBD Consolidated, but there are many libraries that still use it, and she cannot imagine that there would be some big rush to take it down, especially if libraries are vocal about continuing usage. IFLA is committed to maintaining its publications, and it has been on the website for quite a while.

Schiff asked whether there would need to be new or different MARC codes: What would the value “i” (punctuated according to ISBD) mean? Whose responsibility is it to be thinking about this?

Moody said that her understanding, based on being in the examples group, is that ISBDM was never intended as a standalone product. IFLA started with Manifestation as a proof of concept because it was so radically different from the existing ISBD, and they will build out for a fully LRM compliant in-depth process. The IFLA community has already heard that they cannot have an IFLA standard that is based on linked data or relational databases when some regions of the world do not have reliable electricity. There are conversations at the IFLA level that are happening on all of this as well. **Moody** thinks that, therefore, some of the concerns that everyone has raised today will need to be raised eventually. She wonders whether it would be more helpful to couch feedback in words that assume it will get done as part of the process: “well, clearly you all are going to do this, right?” It would be important for them to hear that from as many constituents as possible and also to emphasize this idea that there is no such thing as a single entity description in a descriptive universe where the entities inherently relate to one another.

Glennan brought up Gordon Dunsire’s presentation at the World-wide Review Introductory kick-off webinar. There was some mention that it might stop here. Her understanding is that this has to be something that can stand alone. They have been working on it for two or three years now, and expanding that to other entities will take that same kind of time. **Glennan** reported that the report does ask: since some of the expression stuff is crammed into ISBDM, once IFLA defines ISBD for expression, what is it going to do with those? Are they going to get deprecated? Are there going to be things that coexist in these separate categories? Is this one element in the manifestation standard going to be better defined in expression? **Glennan** said the Task Force did not go there entirely because of what was remembered of Gordon’s presentation in April.

James added that her recollection is consistent with what **Glennan** reported - that development of ISBD for other entities would depend on future support from IFLA. She recalls that there was a tone that suggested that the person doing the presentation did not think that was going to happen, certainly not for all of the entities for LRM. That is why we have these weird things that are expression elements that are being described as manifestation and why we also have SESs for places in ISBDM. The idea was that we want to record a relationship between a manifestation and a place, so ISBDM provided the SES for places, however, how are we applying an SES for places when we haven’t described the place yet? Overall, **James** says she does not believe we will see an ISBD for all of the other LRM entities (or that if it does happen, by the time it happens, there very well might be something else besides LRM in play).

Moody wondered, then at that point, should the feedback become that ISBDM without other entities becomes meaningless and they should not approve it? If they've spent that much time and effort, either they should develop it for everything else or they should call it a failed experiment.

Glennan expressed that her feeling was that this was out of scope for the Task Force - IFLA had decided to do ISBD for manifestation, and CC:DA can point out problems it causes. In **Glennan's** correspondence with Dunsire regarding the keyword index, they said that what they really need is an underlying CMS. At present, ISBDM spans over 300 web pages that are hand-coded and maintained by 2 people. Therefore, **Glennan** is not very surprised that it has various problems. To really make this viable, it needs to have the kind of underlying structure that RDA has; there are some inconsistencies in wording that come out if you spend enough time looking at it because text blocks are not reusable and are being done individually. Part of that is the financial commitment that IFLA has been willing to make at this point. Creating an online standard versus a PDF is new to IFLA, so **Glennan** thought the best approach was not to overly criticize IFLA for even trying to undertake it in the first place.

Moody clarified that she was thinking of emphasizing it more as a proof of concept. That is, the community would like it a lot more if ISBDM did link to other LRM entities, which would push IFLA to pursue this. At some level, if the development is a function of the hand-coding due to what is available to the working group, **Moody** said that perhaps we should make it clear to IFLA that they should be supporting something more robust. Therefore, she does not see it as negative feedback to the specific product, but as emphasizing that work has been done with nice features, but it is not enough to stop here - IFLA needs to keep going and develop infrastructure that would make it sustainable in the way RDA is.

Mendenhall wondered if it was productive to suggest that the whole project is not necessarily wrong and that it could sustain its current form, but it should not call itself ISBDM but something else.

James added that ISBD Consolidated did not use LRM entities, so we had this nebulous concept of resource that was pretty closely aligned to manifestation but didn't really say that, so her personal opinion is that this is what they were tasked to do, so asking them not to call it that is probably a non-starter. But perhaps a better suggestion would be something like we need a standard based on a different model too if there cannot be one based on all of the entities.

Glennan said that she is probably not comfortable with CC:DA telling the ISBMD Working Group that they named their standard incorrectly. She is most interested that CC:DA should provide constructive feedback that IFLA will take seriously, rather than feedback that they will see as whining or failing to understand their intentions. She came back to the idea of things that are out of scope for the Task Group, but acknowledged that there are challenges here. She also said that if you hate RDA official wording, you will have the same reaction to ISBDM - the same close relationship between, say, AACR2 and ISBD, is there between ISBDM and Official RDA. Long term, she thinks that the close relation to ISBDM and Official RDA is a good thing. What is fair to say is that the deconstruction process is the same, the underlying standard is the same, and then there are some of the same players involved. Furthermore, both are designed for a linked

data environment. While CC:DA should point out where it does not make sense or when it does not understand something, **Glennan** is not inclined to complain too much about the mirroring of possibly convoluted language or reasoning, because that is a choice IFLA has made and also because complaining about language has not made much of an impact on Official RDA so far.

Xu said that the Task Force can take **Polutta**'s comment and put it in CC:DA's response document. **Xu** expressed that she shares the same concern. She catalogs articles and reports with twenty to thirty authors, and she uses vertical pipelines to separate them. She finds that this practice is not user-friendly and that it does not support LRM user tasks for discovery or understandability. Why not separate them with commas, when the entire publishing industry accepts that?

James thought it was worth pointing out that the elements in ISBDM are not the same as in ISBD Consolidated. She does not think it is worth it to complain about punctuation because it would not be applicable, necessarily, to what is here. She does not think there is any problem with continuing to use the punctuation, but that it is just not going to be part of ISBDM.

Glennan noted that **James**' comment returns to **Schiff**'s earlier comment about how one would indicate that one is punctuating something in ISBDM in the MARC record, because it is not the same standard as ISBD Consolidated in terms of punctuation and elements. There would need some consideration of that after this becomes an official IFLA standard. Back to the website, **Glennan** said that because there is no actual searching, the sitemap is really helpful because it helps users get around, somewhat.

Returning to CC:DA's response, **Glennan** stated that CC:DA needs to get the report in a form to be submitted by the deadline. In her view, she did not see a path for a revised form to go out for a vote by this committee in time to meet the submission deadline. Therefore, she thought it had to be voted on during this meeting.

The **Chair** rephrased the question, asking whether the CC:DA members were relatively happy with letting the Task Force write the report and put it forth as the opinion as CC:DA. She took a straw poll as to whether there were any objections to doing so, of which none were voiced. The **Chair** expressed that she trusted the Task Force because they had become the experts on the topic.

The **Chair** entertained a motion to allow the Task Force to Review ISBDM to put forth their report as the official CC:DA feedback. **Ros** moved; seconded by **Xu**. No additional discussion. Motion passed unanimously.

Schiff recognized **Maxwell** as the recipient of the Margaret Mann Citation and encouraged all present to attend the awards ceremony immediately following the meeting at the Core Presidents' Program and Awards from 4:00 - 5:30 PM in the Convention Center, Room 23.

The **Chair** recessed the meeting at 3:52 p.m. and announced that the next meeting would be held on Monday, July 1, 2024 at 9:00 a.m.

*Monday, July 1, 2024, 9:00 a.m.-12:00 p.m.
Marriott Marquis, Marina Salon E*

1639. Welcome and opening remarks: Chair

Amanda Sprochi, **Chair**, called the meeting to order at **9:00 a.m.** She welcomed voting members, liaisons, representatives, and visitors.

1640. Introduction of members, liaisons, and representatives: Group

The **Chair** invited committee members, liaisons, and representatives to initial a roster sheet and audience members to sign a separate attendance sheet. The **Chair** invited committee members, liaisons, and representatives to introduce themselves.

The **Chair** recognized **Maxwell** as the recipient of the Margaret Mann Citation this year.

1641. Guest: James Hennelly, Director, Digital Reference, American Library Association [[RDA Toolkit Update](#)]

James Hennelly, Director of the RDA Toolkit, provided an update on the RDA Toolkit. His powerpoint slides are available online in ALAIR: <https://hdl.handle.net/11213/22801>.

- Provided information on RDA Toolkit Release in March:
 - Completed Community Resources Space -
 - There are a few more small updates coming in the July release.
 - The material users were used to seeing under Community Resources is now listed under Legacy RDA Instructions. It will stay in that position and never be edited or updated.
 - Anyone is welcome to take that material and copy it to use as a basis for any other community resources they want to build and maintain.
 - One institution has requested to become a Community Resources Contributor: the National Library of Israel
 - They hope to see more examples of contributions to the Community Resources after the July release and they hope that will encourage others to contribute as well
 - Added translations of Alternative Guidance Menu -
 - Refer to the Alternative Guidance Menu as the “Orientation” menu because it is set up along the lines suggested by Elisa Sze, RDA’s Education & Orientation Officer after research and interviewing of MLIS instructors
 - Not in the default - you need to go into profile and select turn on alternative guidance menu
- Provided information on major rebuild of the Drupal Site Update:
 - The site was moved to new servers.

- Rdatoolkit.org and rda-rsc.org were merged.
- Upgraded Drupal versions that the site was on - it is now on the most current Drupal release. This was important because:
 - Previous Drupal versions were about to go unsupported.
 - Rda-rsc site had hacking issues.
 - The upgrade increased the security of the site.
- Created higher profile space for regional committees
 - New web space for RDA regions on the RDA board
 - Now all have a landing page where they can highlight special events or concerns related to their area
 - Regional news can be reused and promoted on other regions' websites
- Provided information on July release:
 - Revisions to some definitions and subproperties in the registry
 - Adding SPARQL Endpoint Query
 - Can be used for developers to extract information more easily from registry
 - Improvements to Translation Template
 - Main improvement was related to translations being previously unable to add their own Alt labels, only be parallel to English alt labels
- Provided updates on RDA Toolkit translations:
 - Spanish translation work started last fall and is being done in Mexico under **Felipe Martínez** who was with the National Library of Mexico, but is now with Thomas University
 - Work has been moving very quickly - the translation group had the reference piece done within four months, and they are hopeful that translation will be done by the end of the year
 - Arabic is likely to be completely to be completed in the next year
 - We should see updates to Catalan and Italian translations in the coming year
 - Hungarian translation underway as well as Portuguese translations
 - Several additions to registry translations: Several Eastern European languages, and updated simplified Chinese. Traditional Chinese translation of registry is coming soon.
- Provided updates on upcoming work for the RDA Toolkit:
 - New release schedule in 2025: only three updates a year, instead of four, happening in February, June, and October
 - The reason for this change is that as they have more translations becoming active and new policy statements, processing all of these files for publication on the same day is strenuous. It takes a long time (days) to run scripts for and process one language.
 - Plan is to release early in the month with English only and in subsequent weeks will roll out translations
 - Planning to possibly add a server and increase processing power to address processing problems and how long it takes
 - One of their big goals for the upcoming year is to expand on examples. There is an Examples Working Group, so there are more people working on examples.

There are international groups working on examples. Jessica Grzegorski and Hennelly will be working on simple input to access the Toolkit, maybe on Drupal side, to allow anyone to submit examples and will be collected and output into a csv file for Examples group to review. They are looking to add more examples into the Toolkit.

- New test of VPAT (testing that you do to see how your website complies with accessibility standards)
 - Completed one in 2020 and it met, but every five years would like to run VPAT again, and especially after Arabic has been put in.

Hennelly opened the floor up for questions, which there were none.

1642. Guest: RSC Chair Renate Behrens [[ALA Annual CCDA Behrens How to implement RDA](#)]

Renate Behrens, current Chair of the RSC, presented on how to implement RDA. **Behrens'** powerpoint is available online in ALAIR: <https://hdl.handle.net/11213/22796>.

- **Behrens** discussed the four levels of hierarchy of where RDA is situated within international standards:
 - The highest level is Principles; ICP is at the Principles level.
 - The ICP will be updated by the end of the year.
 - Stated basic principles that must be as simple as possible.
 - The second highest level is Model; LRM is at the Model level.
 - RDA is completely based and worked out on the basis of LRM. There will never be a contradiction with LRM in RDA.
 - **Behrens** exhorted colleagues to progress slowly with changes, because basic standards need time to change.
 - Must be stable as possible, but cannot be the same for eternity.
 - The third level is Basic standard / framework standard; RDA is at the Basic standard / framework standard level.
 - The final level is Application profiles; ISBDM, DCRM, LC MGDs, and Policy Statements are at the Application profiles level.
- Discussed the proliferation of options in Official RDA:
 - Recognized the presence of many options in Official RDA.
 - To be really international, standards must provide options for international user communities.
 - Received feedback from user communities trying to use original Toolkit, who said it was too prescriptive and not possible for them to use. They asked for the RSC to open up use more widely.
 - Example: A working group from literary archives that wanted to adapt their small standard for literary archives to RDA. After the release of the official Toolkit, they reported that many problems have been solved.
 - For traditional cataloging in libraries, it means that one can no longer apply RDA one-to-one, thus it is a framework.
- Discussed vision for application profiles:

- Envisions a world in which there are various groups, including archives and others, each with their own application profile(s).
 - Each application profile has an institution or working group behind it - this is very important.
- Discussed challenges in the future of library management and how the standard aims to meet these challenges:
 - Libraries worldwide are under great financial pressures.
 - At the same time, there are greater and greater demands of the GLAM sector to provide so many new things.
 - Standards have to take that into account - RDA does this by offering different options, encoding methods, and cataloging levels and by having users clearly mark the choices made.
- Recognized optimism and excitement for the rise of AI and what it can do in libraries:
 - Machines can do a lot in the areas of: quantity, speed.
 - Machines learn from the past, but they need precise instructions.
 - People can do a lot of what machines cannot, such as: differentiate, select, merge.
 - People can understand rules and can interpret them and can plan for the future.
 - Discussed uses of AI to make use of, for instance, metadata from publishers to create minimal descriptions, especially in cases where there are too many resources for humans to feasibly process.
 - AI will not solve all of our problems, thus we need to be feasible about its uses.
 - There is an RDA working group that has been formed to look at AI. It will think about what standards can provide and how institutions may be able to make use of AI for standardization.
- Discussed the 3R Project and the local communities:
 - Each national or language-based user community must implement the changes and innovations from the 3R project.
- Discussed the necessity of application profiles:
 - RDA is a framework standard, and a framework standard cannot be used without application profiles.
 - Application profiles are much more than simply the technical aspects.
 - The community has always needed application profiles, even if they were not called exactly that in the past.
 - Following application profiles currently supported in the RDA Toolkit -
 - Policy statements
 - Documentation inserted via HTML editor in the Toolkit
 - Annotations and bookmarks
 - Other forms can be described as application profiles for user communities -
 - Handbooks, manuals
 - Best practices
- Certain organizations by regional categories (such as NARDAC, EURIG, ORDAC, etc.), channels to organize these application profiles to ensure compatibility.
- Provided some examples of application profiles:
 - Policy statements British Library
 - Policy Statements LC and PCC

- MGDs Library of Congress
- RDA DACH
- RDA-FR
 - Not an official application profile. They are doing it on their own using RDA text.
- Discussed what is needed for local solutions:
 - Very important to set common goals and these goals should be realistic.
 - Stable organization with sustainable responsibilities is very important.
 - You have to know where you would like to begin.
 - You have to cooperate with other communities.
 - Have to focus on what is most needed in your communities and think about where the big problems are and where there are places where issues can be easily solved.
- Discussed ways to get started with official RDA:
 - Recommended started with easier things before moving to more complex issues.
 - Recognized that many are feeling overwhelmed by implementing official RDA and the numerous new concepts introduced.
 - Let them start with something small and take time to discuss new concepts.
- Discussed what the RSC do to help and support the community:
 - RSC set up working groups to ensure it is a truly international standard (Examples, Technical, Translations, Religions, Extent, AI, Archives)
 - AI is the newest group
 - Archives hope to start in August or September
 - Proposals and discussion papers that communities can review and comment on.
 - Setting up Community Resources
 - Every community can input documentation and document their solutions directly in RDA.
 - Communities can see what other communities are doing and can discuss, learn from, and coordinate with other communities.
 - Documents and Guidelines
 - Training and information events (webinars, etc.)
 - Liaisons with other standardizations
 - Solidifying existing relationships and forming new ones

Glennan asked about the ICP and its development. She asked whether there will be a worldwide review scheduled for the ICP. She also asked about the timeframe of that review. **Glennan** expressed that she is sure this committee would like to be involved in that review.

Behrens answered that there will be a worldwide review scheduled for the ICP. Work on this started in the Cataloging Section, chaired by **Christian Aliverti**. There is a first draft, but it is not finalized so far. It has to go first to the IFLA Committee on Standards. **Behrens** reiterated that there will be no big changes to the principles. The principles will remain more or less the same with some additions, but they will be smaller than before. That is, there were items originally included that were deemed by the working group to be inappropriate for principles and to be more suited for standards - these will be removed. **Behrens** estimated that they may begin review at the start of next year, but assured listeners that there will be a review, which is prescriptive for

IFLA.

Glennan said that this is something CC:DA should track in order to provide a response. She noted that there may not be much time, and CC:DA may need a short-term and nimble task force to provide a response on the ICP update, probably at the beginning of 2025.

James raised a question on application profiles. She pointed out that Behrens mentioned ISBDM as an example of an application profile. However, **James** thought ISBDM was also a standard based on LRM (along with RDA). **James** said she has looked at ISBDM in the past month and that she has not seen any mention of RDA. She asked: how would one know whether it is a different standard based on the same model versus an application profile of RDA?

Behrens answered that the existing ISBD, as it stands now, is not based on LRM, because it was worked out before LRM. It was the decision of IFLA to revise ISBD. There was an ISBD update two years ago with small updates that were owed to the community. To align ISBD with LRM was going to be such a big step that the decision from the Committee on Standards was to start with the manifestation level. The other levels, like work, expression, will come later. ISBDM will be provided as an online tool - it will be the first IFLA standard to be provided as an online tool. So, it was decided that LRM is standard for all bodies right now and that ISBDM should be in line with that. It was **Gordon Dunsire** who had an eye that there would be no contradiction to RDA. **Behrens** said that ISBDM is not a framework standard like RDA. ISBDM is and will remain prescriptive. In the hierarchy, it is on the last level. It makes complete sense for ISBDM to be in line with RDA, and there is no contradiction because RDA is completely based on LRM as well. **Behrens** sees the ISBMD in line in this hierarchy and as a broad application profile for RDA

Glennan added a follow-up question to that, which was that, as **James** brought up, mention of RDA is currently not in ISBDM. So, would it be appropriate in CC:DA's response to say that there should be a mention of RDA in the introduction to ISBM to make that connection explicit?

Behrens recognizes that that was a good point and that was why she included it in the hierarchy. She discusses how in IFLA itself, in many working groups, there were questions about what it was (i.e., a model, a standard). The Committee on Standards will decide at the end of this year if they will make a further working or task group for the work or expression level.

Maxwell had the same question as **James** and made a personal comment. He said he did not think it was appropriate to say that ISBDM is an appendage to RDA. Perhaps it does not conflict with RDA, but in ISBD itself, it did not say it was an application profile for AACR2 - if it did, there would have been an outcry. He said he thinks it is a parallel standard and that it is inappropriate to say that it is a subordinate to RDA. He expressed that he thinks it should be independent from RDA.

Behrens acknowledged that ISBDM is different from RDA. She said that although it is part of a hierarchy, she does not think of it as "under" RDA. It is in the tradition, perhaps, of RDA.

Schiff said that that structure and this discussion has made him think about the position of RDA

in regards to IFLA. He asked: Are there framework standards other than RDA that might be being developed to comply with LRM?

Behrens answered that there are not.

Schiff said that he did not think so. Therefore, he said, RDA is positioning itself as the standard to use with the LRM model. That made him wonder: why isn't RDA an IFLA product? It seems to be saying that it is the framework standard that the world should use to follow the IFLA standard.

Behrens responded that that is an organizational thing. IFLA standards must be free and accessible; they have a lot of process and development. RDA has another organizational structure. For a long time, it seems to be a contradiction. However, since two years ago, she said they have become closer to addressing this contradiction by creating an official liaisonship between the RSC chair and the chair of the Committee on Standards in IFLA. She added there is no intention within IFLA to work out a broader framework standard; they are relying on RDA. ISBDM is not the only standard. She pointed to the problematic nature of the use of the word "standard" and the definition of standard as one of the root issues. "Framework" could be an alternative word, perhaps.

Maxwell added that he would think that saying that the ISBDM is an application profile for RDA would raise hackles at IFLA. Since RDA is independent, he expressed he does not feel it is appropriate for an IFLA standard to be an application profile for RDA.

Behrens said there was no contradiction in the Committee on Standards.

Maxwell responded that it can have no contradiction with RDA without being a formal application profile of RDA.

Schiff asked whether they were finding that other countries using other cataloging standards are thinking of moving to RDA. In particular, he was thinking of eastern Europe.

Behrens said they are eager to use RDA and that some of them are trying to do so. She mentioned that in eastern Europe, many countries are facing money issues - they have the war in Ukraine. Even during the war, however, the Ukrainian Library Association asked for an RDA translation. Therefore, despite financial troubles, countries in eastern Europe are eager to use the standard and the RSC is eager to support them. As for other countries, like Italy, there is a lack of organizational structure. **Behrens** said that organizations are important as linking points to come together, but many countries do not have this. For instance, when the RSC was starting working with GLAMs in the German speaking world, they found that archives have this type of organizational structure, but museums not so much. Therefore, many who work in museums in the German speaking world were interested in joining with the organizations. The Committee on Standards now has members from archives and museums, because they do not have something like it. She added the small application profile for literary archives based on RDA is developed under the umbrella of the library sector organization of the Committee on Standards. On their own, they would not be able to do it, but they are eager to join the organizations as linking points

for information and exchange. That was why it was decided that the RSC should have an Archives Working Group.

Polutta indicated that this was of interest, because they have been interested in reaching out to archives and museums as well. She asked whether the working group was planning on doing outreach or development to archives or museums. She said she does not know whether they have a clear vision of how to reach out to archives here in North America.

Behrens responded that from her experience and perspective in Europe, it is not easy. As for the RSC, when it sets up a working group and it is official, there will be approval in the RSC meeting in July, and then there will be a wide call-out. She indicated that it is not like the working group will be set up and then there will be only one call-out; rather, the working groups are always open and receiving feedback on an ongoing basis. She expressed that working groups become bigger and bigger based on connections within the field and word of mouth. That said, there will be an official call-out that will be posted on the RSC website under news and announcements.

The **Chair** encouraged everyone to volunteer, in particular those who have strong feelings about where the community should be going with this. Interested parties should visit the RSC website or contact **Behrens** at RSCChair@rdatoolkit.org.

1643. Report from the NARDAC Representatives: Maxwell and Schiff [CC:DA/NARDAC Reps/2024/2]

The full report is available online in ALAIR: <https://hdl.handle.net/11213/22802>.

Schiff addressed items of interest to this committee.

- NARDAC added two new members to the committee:
 - Dr. Shawne Miksa, from the University of North Texas, represents the cataloging education community.
 - Daniel Paradis, from the Bibliothèque et Archives nationales du Québec, represents the French speaking North American cataloging community.
- NARDAC continues to meet monthly on Mondays.
- Submitted comments on two RSC proposals for the meeting in April:
 - RSC/ORDAC/2024/1/NARDAC response: Dual-language naming of corporate body and place
 - RSC/TechnicalWG/2024/1/rev/NARDAC response: Proposal to revise the element hierarchy for appellations of work groups
- NARDAC continued to work on a proposal relating to inconsistency in the transcribed manifestation elements related to source of information, led by Maxwell.
- Intending to work with CC:DA on a proposal to allow the inclusion of numerals in non-Latin script languages as part of a personal name access point. Currently RDA only recognizes Roman numerals - NARDAC would like to open that up more to be more internationalized.
 - Coming also from the work of SCS Task Group on Guidelines for Evaluations on Non-Latin Script References, which has also made a proposal to MARC to expand beyond Roman numerals in subfield b of X00 block.

- Three NARDAC members (Clara Liao, Thomas Brenndorfer, and **Maxwell**) served on the PCC's RDA Training Task Group: Monographs
 - Most present at the meeting likely attended the webinars for the modules that were offered in April/ May.
 - A few more NARDAC members participated in presenting these modules.
- Held Spring Update Forum in April - there is a recording of this available on the RDA YouTube channel at https://www.youtube.com/watch?v=AXc2bbH_W7E.
- Held an Update Forum earlier during the ALA 2024 Annual conference, where members of the RDA board presented what is going on in the world.

Maxwell provided additional updates of interest to the committee.

- Mentioned the RDA Update Forum earlier at ALA Annual, connected to **Behrens'** comments about RDA spreading around the world, and expressed hope for new collaborations internationally in new parts of the world.
- Provided report on the RSC's activities:
 - Since their last report, there has been no change in the membership since six months ago.
 - RSC membership has representatives (theoretically) from the six UN regions of the world, but at the moment there are only three: Europe, North America, Oceania.
 - Reported on who holds each position on the RSC, which can be found in the report
 - The RSC has held two meetings since last time. **Maxwell** highlighted items related to the meetings of interest to the committee:
 - Jessica Grzegorski is the Chair of the Examples Working Group, which is looking for volunteers. This is a new working group that will help the Examples Editor to get the examples that the community has been asking for. If interested in volunteering, contact Grzegorski.
 - The Education and Orientation Officer was made a permanent member of the RSC.
 - There is a new RSC working group on AI, in recognition of great interest in the community.
 - From now on, RSC discussion papers and revision proposals need to include an impact statement, with four mandatory sections: impact on users; impact on catalogers; impact on legacy data; and impact on RDA.
 - The Original RDA Toolkit was confirmed in the January RSC meeting to be coming down in 2027.
 - In the January meeting, Damian Iseminger (RSC Technical Team Liaison Officer) gave a presentation on the purpose of the Working Group Liaison Officer and team, helpful to those who want to know what the position and the team do.
 - Any revision proposal or discussion paper must first go by the Technical Team.
 - The Technical Team's purpose:
 - Ensure semantic integrity of RDA
 - Check proposal conforms to LRM
 - Update the registry when changes are made and update the

guidance parts of RDA

- Approved the Archives Working Group - they are looking for interested volunteers.
- Considered two revision proposals mentioned by **Schiff**, for which the RSC received comments from CC:DA and NARDAC:
 - RSC/ORDAC/2024/1: [Proposal on] Dual-naming of Corporate Body and Place. This proposal dealt with corporate body and place names that seem to contain parallel names in different languages but are intended to be used as a single string.
 - This proposal was not approved, but not shut down either. A smaller working group is working on this, which is supposed to take two months and will probably be discussed again at the next meeting.
 - RSC/TechnicalWG/2024/1: Proposal to revise the element hierarchy for appellations of work groups.
 - This proposal did pass.

The **Chair** reminded everyone of the short turnaround on the proposal on religions that is up on Connect ([RSC/ReligionsWG/2024/1](#)). Members must make comments by the end of this week, to get them to **Maxwell**.

Maxwell echoed the call for comments on the Religions Working Group proposal - even if just to say it looks fine. As for the other proposal, the Extent Working Group's proposal, which is a much more broad ranging proposal. **Maxwell** suggested starting as soon as possible and asked whether CC:DA wants to have a task group on that.

Since the Extent Working Group's proposal will need to be discussed at the November RSC meeting, it was decided through discussion that the issue of CC:DA forming a task group to respond to it should be dealt with during this meeting. The **Chair** moved the topic to New Business.

James had a question / request for the NARDAC part of Drupal site. It says that the ALA representatives to NARDAC are appointed by ALCTS and then it links to ALCTS site that does not exist. She asked if this could be updated.

Polutta answered that it will be updated as soon as she has a new login.

Schiff said that **Polutta** is the webmaster. He mentioned that there are other things that are awaiting updates, such as that new members have not been added yet.

The **Chair** took this moment to mention that the CC:DA roster will also be updated at the conclusion of ALA Annual 2025, however, there may be delays in June and July due to organizational transitions and groups who will not be making the decision until later.

Pettitt asked whether there is an example of a proposal, or some kind of template, for groups that

are putting proposals forward to NARDAC or one of the other regional groups that represents what proposals should look like.

Maxwell answered that there is no template, but he would recommend looking at recent proposals on the RSC website under documents.

The **Chair** said it would be a good idea to put on the website somewhere that the impact statement is a requirement for all proposals going forward.

Moody added that **Glennan** did a webinar on RDA change proposals that is up the RDA Toolkit YouTube.

Glennan confirmed her work on the webinar and also mentioned that there is an RSC operations document ([RSC/Operations/4/2024](#)) on how to write proposals and what the process is from RSC's perspective. She also echoed **Maxwell's** suggestion to look at past proposals.

Behrens added that the RSC Secretary is happy to help and to field questions about proposals.

Xu brought up an urgent need for the community to think about, and possibly make a proposal on, how to record detailed funding information. Right now in MARC, funding information is recorded in field 536 as a text block, and it does not record the funding agency name or ID number. For text mining and for answering reporting needs, catalogers need to be able to tag funding agencies. **Xu** asked whether this falls into the category for a new proposal for addition.

The **Chair** asked whether that would be an RDA proposal or a MAC proposal.

Schiff first addressed **Pettitt's** comment, saying that because CC:DA proposals must go through NARDAC, if proposals were to be deficient in any way that the RSC wants, NARDAC would remedy that.

Maxwell concurred with **Schiff**, saying that CCDA proposals must go through NARDAC. However, CC:DA is not the only group that can make proposals. Any group under the umbrella of NARDAC can make proposals and NARDAC can accept them. As for **Xu's** question about whether the proposal on recording detailed funding information should go to RDA or MAC, **Maxwell** said that it depends. For instance, in the proposal about changing the Roman numeral requirement, it was discovered that both MARC and RDA were deficient. You would need to look at RDA and see whether RDA development has what you are looking for. It sounded like possibly MARC, but you would need to look

Schiff mentioned that there are MARC fields where you can record contracts and sponsors and the like.

Xu said it was field 536. She reiterated that, in the MARC field 536, text is entered as a big block. According to Crossref, funders have a funder name and ID, which are URIs.

Schiff answered that, in this instance, you have to decide whether it is appropriate to be covered by RDA, that is, considering whether there is an existing RDA element for this, and if not whether there should be. If the answers to both are no, then he thinks it is a proposal for a MARC revision that would need to be made to accommodate what you need.

Glennan agreed and said that the cataloger, as the expert in what they are trying to record, would need to look in RDA's introduction to see what is and is not in scope and whether their case falls in scope. She said that making a proposal to NARDAC is a possibility, and she added that the proposals are strengthened by the number of people who look at them before they get to the RSC, so NARDAC would probably want CC:DA to look at it, rather than having one send a proposal directly. CC:DA could consider a proposal from an individual or a group that has been charged by CC:DA to investigate something.

Maxwell clarified that his comment was not necessarily referring to proposals from individuals, but from groups. He agreed that it is best to have many people look at it.

Moody said that if people have a MARC field in mind and they are not sure whether there is a corresponding RDA element, if you search the RDA Toolkit by that MARC field and then limit it to elements, you will get all of the RDA elements that have been matched to that field. If you know what MARC field you want to use and you are not sure if there is a way to record that information in RDA, you can go from MARC to RDA to investigate the possible elements to see if there is already something there.

1644. Report from the PCC Representative: Moody [[CC:DA/PCC/2024/2](#)]

The full report is available online in ALAIR: <https://hdl.handle.net/11213/22804>. **Honor Moody**, the current Co-Chair of the SCS, stood in for **Hank Young** to report on behalf of the PCC and addressed items of interest to this committee. She noted that much of the information (including links to recordings) is already in the report.

- The PCC Joint Operations Committee Meeting was held at the Library of Congress from May 2nd to 3rd, 2024.
- PCC held an At Large Virtual Meeting on March 28, 2024.
- PCC Chairs were guest presenters at the April 2024 OCLC AskQC Office Hours, where there was a broad overview of PCC, its work, and opportunities for broader community engagement. OCLC staff also reviewed the editing capabilities for BIBCO records by non-PCC OCLC members.
- Interested parties can review upcoming PCC events on the PCC Calendar website.
 - The PCC Participants' Meeting was yesterday (June 30th), but there will be a repeat later in July.
 - PCC Linked Data and Tactical Planning Meeting will be held on November 6th in advance of PoCo on November 7th. These two are closed meetings.
- Advisory committee on Equity, Diversity, Inclusion, Belonging and Accessibility (EDIBA) submitted its 2024-2025 report. It also issued a PCC Meeting Accessibility Tip

Sheet and Infographic.

- Reported on the progress of PCC Task Groups:
 - The PCC Task Group for URIs in MARC Implementation and Support was charged in February and will continue the work of earlier PCC Linked Data Advisory Committee and Identity Management Advisory Committee URIs Guidance Subgroup.
 - The SCS Task Group on Privacy in Name Authority Records submitted their Preliminary Report in March. The group has engaged in literature review.
 - The Task Group for Metadata Related to Indigenous Peoples of the Americas submitted its Preliminary Report in April.
 - The Task Group on Strategic Planning for AI and Machine Learning submitted its Final Report in April.
 - Summarizes the survey that the group conducted.
 - Its recommendations included revising the 2023-2027 PCC Strategic Directions and charging a new task group charged with several tasks developed by current group, including creating a statement of principles on the use of AI and Machine Learning technologies in cataloging and metadata work, developing a preliminary list of AI resources on the PCC wiki, and developing cataloging best practices.
 - There is a PCC FAQ on cataloging works generated by AI programs and Charlene Chou discussed this at PCC Participants meeting
 - SCS Task Group on Evaluation Guidelines for Non-Latin Script References in Name Authority Records submitted a progress report and hosted an informational webinar on June 20th.
 - This webinar is recommended for anyone who works with non-Latin scripts, and the recording can be found linked from the task group wiki.
 - The SCS Task Group on CONSER Policies for Official RDA in MARC was charged in January and has made preliminary recommendations that are currently under review by the CONSER community and by the SCS.
- Two more quarterly updates were sent to the PCC List.
- The Communications Public tracking spreadsheet is the best method for determining the latest status of proposed changes to the LC-PCC PSs and MGDs for the Official Toolkit and it also documents responses to questions for future reference.
- PCC Task Group to Test the Official RDA Toolkit issued its final report, which summarized the most frequently cited or most significant problems from the test and provided general recommendations.
- PCC appointed a task group to deal with issues surrounding the implementation of Official RDA, which is charged with developing an implementation plan that clearly outlines what implementation will mean for PCC members.
- Updates from the Standing Committee on Applications, chaired by TJ Kao:
 - Charged PCC Consultation Group for Library Systems and Vendors.
 - Created a PCC test GitHub and made URL available on numerous PCC Wiki pages and updated ISO 639-3 mapping table to incorporate recent 3-year changes and uploaded it to the GitHub repository.
- Updates from SCS, co-chaired by Matthew Haugen and Honor Moody:

- Updated PCC guidelines for application of relationships designators in NACO authority records in terms of relationships to geographic name authorities.
- Published updates to the Provider-Neutral E-Resource, MARC Record Guide: P-N/RDA version regarding open access versions of resources and other updates. Further updates are anticipated related to accessibility and summarizing the recommendations of the SCS Task Group on Accessibility Information on Provider-Neutral Records.
- Planning to charge a Task Group to work on updating the guidelines for implementation of official RDA which **Moody** believes is limited to print monographs. They are in the process of charging this group and are looking for BIBCO representation on this committee.
- Reviewed a draft of the BSR Metadata Application Profile for Official RDA, submitted by the PCC Task Group on Metadata Application Profiles.
- Drafted and posted a new FAQ document on cataloging resources generated by AI software.
- SCS has completed revision to the CONSER Cataloging Manual module 35 section 2.6.6, regarding frequency updates for integrated resources based on a request from the Government Publishing Office.
- Working with NDMSO to publish two vocabularies on id.loc.gov:
 - PCC Entities for Authority 075 with \$2 pcent, which came from the Task Group on Developing PCC Entities Vocabulary
 - PCC Extensions to Related Place (authority 370 \$i/\$4), which was previously discussed in Summer 2023
- SCS sponsored two discussion papers at MAC Midwinter in January 2024
 - To add \$e and \$4 to bibliographic fields 647 and 648 which was approved as fast track proposal
 - To add \$1 and \$0 to bibliographic fields 506 and 540, which will return as a full proposal in June 2024
- SCS sponsored one proposal and 5 discussion papers at MAC Summer Meeting in June 2024
 - The proposal to add \$1 and \$0 to bibliographic fields 506 and 540 - approved
 - Discussion paper to add \$0/\$1 in bibliographic field 024
 - Discussion paper to add \$3 in bibliographic fields 508/511 - approved as fast track
 - Discussion paper to add \$7 in above 024 and 5XX fields
 - Discussion paper to \$i and \$4 in several bibliographic /authority 3XX fields
 - Discussion paper to redefine \$b for numeration in bibliographic / authority X00 fields
- SCS, chaired by Jeanette Norris
 - Continuing its work with Catalogers Learning Workshop, completed PCC Introductory Phase 1 RDA training webinar, an eleven-part series that ran from March 13 - May 22. The videos for this are up for those who did not get a chance to watch them. They are a great resource which **Moody** highly

recommended.

- RDA in Practice, developing training curriculum for PCC participants to catalog print and electronic books, and monographs using official RDA Toolkit, LC-PCC Application Profile, LC-PCCs , and the LC-PCC MGDs.
- In the process of drafting a charge for a training and mentorship program development task group and a charge for an SCT RDA Training Task Group: Authorities.

1645. Report from the OCLC Representative: James [[CC:DA/OCLC/2024/2](#)]

The full report is available online in ALAIR: <https://hdl.handle.net/11213/22807>.

James reported on items of interest to the committee.

- The OCLC Quilters put forth a quilt for the silent auction for Christopher J. Hoy Scholarship
- OCLC reported on its recent WorldCat enhancements:
 - The first enhancement was regarding encoding levels.
 - In addition to the MARC encoding levels, OCLC had four alphabetical codes: *I*, *J*, *K*, and *M*.
 - In 2020, OCLC began work to eliminate these alphabetical code to transition to just using MARC codes.
 - In 2022, OCLC made encoding level *K* obsolete.
 - In May 2024, OCLC decommissioned encoding levels *I* and *J*.
 - Now, they are down to only one alphabetical code, that is *M*, meaning added from a batch process. This unfortunately does not provide an indication of the fullness of the record. For records with encoding level *M*, catalogers have to determine the fullness of the record themselves based on access points, subject headings, and so on.
 - OCLC is changing encoding level *M* records as they are encountering them. The records are changed to the appropriate encoding level based on the contents of the record and a field 936 with the designation “BATCHLOAD” is added. Thus, a field 936 with the designation “BATCHLOAD” is used to identify records that began as an encoding level *M*.
 - As they find encoding level *M* records and have the ability to do so, OCLC is encouraging catalogers to upgrade them to full level records and make any necessary changes. As full level records, the appropriate encoding level would be blank.
 - OCLC has also been doing DDC enrichments to records.
 - Since February 2023, over 88 million DDC numbers have been added to WorldCat bibliographic records that lacked a DDC number.
 - This is an ongoing effort, and OCLC does routine updates to add the 082 field several times a year.
 - Catalogers will know that the 082 field was added as part of this project because of OCLC’s MARC organizational code \$q.
 - The report provides selected statistics from work undertaken by the WorldCat

metadata quality team to improve records.

- OCLC is planning enhancements - currently working on a project involving corporate bodies that are mentioned in fields 110, 610, and 710.
 - OCLC's WorldCat Entities service, which has linked data ready descriptions, calls corporate bodies organizations.
 - Currently creating the description in WorldCat entities for organizations.
 - URI example of entry for OCLC in WorldCat entity available in report.
 - When done with organization descriptions in WorldCat Entities, planning to add subfield 1 URIs to MARC bibliographic records in fields 110, 710 (excluding name/title) and 610 (with FAST headings which you can recognize by \$2 fast).
 - Report provides examples of what it will look like in Record Manager and Connexion.
 - Focusing on corporate bodies that are established directly for now, so will not find URIs for corporate bodies established subordinately in WorldCat Entities. They are also not doing URIs for conferences, etc. at the moment.
- OCLC had a very recent update to their offline controlling service:
 - The update will make the maintenance of these subfield 1 URIs much easier.
 - Subfield 1 will be automatically added if not there already in OCLC's automated controlling process.
 - If there needs to be an update, that will happen in an automated way for \$1 as part of controlling process.
 - Catalogers using Record Manager with appropriate authorization may insert a subfield 1 with an Entities URI for fields where entities are available. There is a look-up available to ensure that you have the correct URI.
- OCLC Webinars:
 - Continue to hold popular AskQC office hours
 - August 2024- Name that Identifier - standard numbers, national bibliography numbers, & others (Cynthia Whitacre and James)
 - September 2024 - Cataloging audio books (Morris Levy)
 - October and November not available yet, but they are going to happen, and registration links for August and September are already online
- Virtual Cataloging Community Meetings:
 - May 15th of 2024, OCLC held its first virtual OCLC Cataloging Community Meeting for libraries in Australia and New Zealand (targeted to Australia and New Zealand, but open to everyone).
 - One of the sessions was *Implementing Official RDA at the National Library of New Zealand* by Anoushka McGuire, Team Leader, Cataloguing Team 1, National Library of New Zealand. Recording is linked in the report.
 - On June 21, 2024, OCLC celebrated five years of Virtual Cataloging Community Meetings. These meetings began in June 2020 due to the COVID pandemic, however because they proved very popular, they have been continued as a regular

event in addition to in-person meetings at ALA. These meetings have had registrations from over 100 countries and many attendees, including Jay Weitz, a retired OCLC employee, former CC:DA liaison, and music cataloger.

Maxwell asked about the fixed field *M* code, wanting to know what incoming batch load records will look like. Will the system determine whether they are full or not?

James answered that, when these records come into OCLC, they are still encoded as *M*; that is, OCLC is still taking in level *M* records, and they are not able to make that encoding level invalid yet. What OCLC is doing is changing the encoding level *M*, typically when they do something else to the record. OCLC has a special macro that checks for various things and changes the record appropriately. However, the community will still see new encoding level *M* records coming in. They are in the process of figuring out how to decommission this encoding level.

Schaffer asked about the encoding level *L*, which existed in the past. He asked whether that was decommissioned before this last project.

James responded that she is guessing that it was, because she has never heard of it.

Schaffer clarified that it was the corresponding full, less than full coming from a computer, and then the full, less than full coming from tape.

Glennan said that she does not think this encoding level *L* was ever fully implemented. As she recalled, encoding level values *K* and *I* were set up for "less-than-full" and "full" level records, with a corresponding distinction between values *L* and *M* for batch loaded records. In her recollection, it was complicated to adequately represent full level encoding for batch level and OCLC ceased to use it.

Schaffer said that it did, however, make it into some documentation.

Glennan agreed, but said that it was the first encoding level that was decommissioned.

Clark asked **James** to review again when the 936 "BATCHLOAD" is added now.

James clarified that a 936 is added now when OCLC encounters a record with encoding level *M* and changes it accordingly. She added that there is another use of the 936, but that is for CONSER records and it does not say "BATCHLOAD."

Maxwell asked whether non-OCLC catalogers should add a 936 when they upgrade a record previously with encoding level *M*.

James said that OCLC is not asking catalogers to do that.

Glennan added, however, that OCLC documentation asks catalogers not to remove a 936 for "BATCHLOAD" if they find one already in the record, even if they have changed the record. In

other words, OCLC is asking catalogers to leave the 936 with the designation “BATCHLOAD” alone.

The **Chair** summarized this as “don’t add [a 936], but don’t erase.”

1646. CC:DA Task Force on Personal Names in Official RDA: Pettitt

Pettitt reported that, although they had hoped to have a proposal ready for the meeting, work for this Task Force was delayed and the Task Force is not currently ready to make a proposal. Instead, **Pettitt** provided an update on their progress.

Pettitt reiterated the Task Force’s original charge, which was to examine the treatment of compound surnames in personal names in RDA. The Task Force came about because **James** had brought up a rule in RDA regarding compound surnames that essentially says if there was a compound surname with an initial before it, catalogers were instructed to simply not use the initial part. The Task Force was charged with looking at other places where the concept of compound surname is mentioned in RDA and examining how the issue is handled. In reviewing that, the Task Force has found that there are a number of different ways in which RDA suggests handling compound surnames at various entity levels.

The Task Force has identified all places where this is a potential issue and plans to systematically review them. It is especially under agent, personal name, collective agent, and corporate body. The Task Force also identified that “compound surname” exists in the glossary, but it does not currently exist as an element, although surname itself exists as an element. The Task Force is looking into how to put all aspects into a report that is both internally consistent and also consistent with the structure of RDA.

Pettitt reported also that some on the Task Force have since left the committee, but they will continue to contribute to the Task Force.

The Task Force hopes to wrap up their work as soon as possible this summer for CC:DA to review before being sent to NARDAC and possibly forwarded on to the RSC. **Pettitt** said that there are expected to be further impacts on things like policy statements too.

Schiff asked whether the Task Force had looked at instructions for family names, as there might be compound family names that might be affected as well.

Pettitt said he would have to look.

Schiff recommended taking a look at Chapter 11 of RDA.

The **Chair** said that the outcome of the work for this Task Force can be discussed online as well, so the Task Force should feel free to submit it whenever they are ready.

1647. Continuation of any discussion from the previous meeting

There was no continuation of discussion from the previous meeting.

1648. New business: Chair

The **Chair** brought up the issue of the upcoming Extent Working Group proposal and discussed options to form a task force. She expressed a preference for an officially proposed task force, saying that a more structured approach would be prudent due to the complex nature of the proposal.

Working backward, **Glennan** estimated that, in order to submit to the November RSC meeting, NARDAC has to prepare their response by November 15th, meaning CC:DA would want to gather thoughts in a way that NARDAC could use by October 15th and leaving July, August, and September as the period during which the work must be done. Since no CC:DA meetings are scheduled during this time, any work that will be done has to be done through the online environment. **Glennan** expressed that the advantage of forming a Task Force is that they would be charged to formulate the official ALA response to the proposal. If that is the approach CC:DA ends up adopting, members would need two weeks to vote, so comments need to be in September. Even if a task force is not formed, CC:DA would still need to vote by mid-September to organize its thoughts, leaving about two months in the interim.

Glennan communicated that she believes this is an incredibly important change that all liaisons and members should be involved in reviewing. She edited the earlier version of this as the ALA Representative and it was 100 pages. It reconstructs and reorganizes how catalogers handle extent.

As former chair, **Ros** highly recommended that CC:DA call a task force because, that way, there is some assurance that the work gets done, especially since the time period in question is the summer and early fall.

James added that, having skimmed through this document, she found it pretty complicated. It also includes the suggestion of value vocabulary. Her opinion was that it would be good to form a task force.

Moody seconded **Glennan**'s suggestion that liaisons in particular participate. She also recognized that there are some historic liaison relationships that had not been reconstituted, but that this could be used as a good opportunity to push to get them involved, in particular those who provide representation of non-monographic print resources.

Myers noted that different organizations have different structures to come to consensus on RDA, but that CC:DA should take up the task of creating a task force and soliciting membership feedback and review now.

Taking her official "Chair" hat off and speaking as a former member, the **Chair** said that this even falls outside of the normal way of handling proposals, because of timeline and complexity. If CC:DA is to do this, the task force would need someone to be the chair. This person needs to be a member of CC:DA. The other members of the task force can be anyone.

The **Chair** asked a CC:DA member or liaison to step up as soon as possible.

The **Chair** entertained a motion to form a task force to prepare the official CC:DA response to the extent proposal, which would be due to CC:DA for a vote no later than October 15th.

Glennan moved that CC:DA form a task force to prepare the official CC:DA response to this extent proposal which would be due to CC:DA for vote no later than October 15th; **Ros** seconded. There was no other discussion. Motion carried unanimously.

Members with interest in chairing this Task Force were told they should contact **Glennan**.

1649. Reports from the floor: Chair

The **Chair** shared that she still intends to create informal CC:DA documentation on Chair information and responsibilities. She also still wishes to see welcome documentation for incoming CC:DA liaisons and members, as that has not been updated in many years.

The **Chair** thanked the ad-hoc executive committee of **Ros**, **Glennan**, and **Myers**, who helped her transition to Chair during a chaotic period.

The **Chair** also thanked CC:DA's two NARDAC representatives, **Maxwell** and **Schiff**, for acting as conduit to the RSC.

Finally, the **Chair** thanked the members, liaisons, interns and anyone who has volunteered for a task force.

1650. Reports from the floor: Incoming Chair

Glennan thanked the **Chair** for her leadership this past year.

1651. Announcement of next meeting: Chair

The next meeting will be around the time of Midwinter, now called LibLearn X, which falls around the middle of January to the beginning of February. A virtual poll will be sent around to determine the exact meeting date and time, and the meeting will be held virtually online at the agreed upon time.

In keeping with the voting agreement, CC:DA will convene in person at ALA Annual 2025 in Philadelphia.

1652. Adjournment: Chair

The **Chair** invited a motion to adjourn the meeting. **Ros** moved to adjourn the meeting; seconded by **Pettitt**.

The **Chair** adjourned the meeting at 11:38 a.m.

Respectfully submitted,

Charlotte Cotter, Intern