OLAC Cataloging Policy Committee (CAPC)
The meeting began with introductions, adoption of the agenda, and a brief summary of the CAPC open discussion forum held at the OLAC 2017 conference in Richmond, Virginia.

The next portion of the meeting was devoted to liaison and task force reports (only selected highlights appear here—see the full CAPC meeting minutes normally published in the March OLAC Newsletter):

- CC:DA Liaison Kelley McGrath reported on the revised timeline for the new RDA Toolkit rollout and the new governance structure for the RSC. Kathy Glennan has been appointed as the new RSC chair; she will spend this year as chair-elect and will serve four years as the chair. The Saturday CC:DA meeting will include an update from the RDA “Pop-Up” meeting held at ALA annual, to which specialist cataloging communities (including OLAC) were invited to provide feedback on RDA.

- MAC Liaison Cate Gerhart reported that there is one proposal and six discussion papers on the MAC agenda. The proposal (2018-01) would add a new value to 007/04 to better accommodate digital cartographic resources. Discussion papers of interest to AV catalogers include 2018-DP02 (adding a code to the 041 field for accessibility modes), 2018-DP-03 (adding $3 to 377, 380, 381, 383 fields to specify which part of the resource the information in the field applies to).

- The LC report contained information on a new LC classification range for social media (PN4550-4583), a new initiative “Library of Congress Labs” (labs.loc.gov) to facilitate exploration and discovery in the LC digital collections, and an update on LCDGT project phase 3. Approximately 50 new LCGFT terms for artistic and visual works (in collaboration with ARLIS/NA) are up for approval in February. Current LCGFT top terms “Motion pictures,” “Television programs” and “Video recordings” will become narrower terms to top term “Visual works.”

- The OCLC report included highlighted new virtual “Ask QC” office hours and an update on the pilot program to train PCC institutions to merge master bibliographic records.

- The MOUG liaison report presented highlights from the recent MOUG meeting in Portland, Oregon. MOUG celebrated its 40th anniversary at this meeting.

- The RDA Standing Subgroup reported work on the revisions of current RDA Best Practices documents is taking place. The goals is to get the documents revised so the Unified Best Practices Task Force can get going on their work.
The Unified Best Practices Task Force’s work is underway, with the first step of reviewing best practices for alignment; or whether separate best practices would best support a particular format in particular situations. The group will work on this step while waiting for revisions made necessary by the forthcoming RDA/LRM content.

The Objects RDA Task Force hopes to have a draft of their guide available by ALA Annual.

New business included a recap of the recommendations of the Joint MLA/OLAC 33X/34X Task Group and discussion of potential next steps. A potential CAPC task force to produce a best practices guide covering various types of portable digital media was suggested during the open discussion forum at the OLAC 2017. These devices often come with pre-loaded content, and can be audio or visual in nature. This guide would incorporate the current work of the RDA Playaways Guide Task Force. OCLC is discussing inclusion of a “marker” to indicate that a resource is open access; this would likely be included in the 856 field ($e, the last subfield available). OCLC would like to bring OLAC and PCC into the discussion before preparing a MAC proposal. Suggested revisions to the RDA Best Practices for streaming media and video games guides were distributed and discussed.

RDA Forum & RDA Pre-conference

The RDA meetings at ALA Midwinter focused on the status of the RDA Toolkit Restructure and Redesign (3R) Project.

The RDA Forum provided a sneak-peek at the new product (James Hennelly) plus a recap of RSC activities and outcomes from the Madrid RSC meeting in October 2017 (Kathy Glennan).

The design and organization of RDA content will be completely new with the new Toolkit. There will be a greater emphasis on individual profiles, in order to customize the user’s Toolkit experience. RDA content will be arranged in LRM order, with no hierarchy. Each page in the RDA content is either an element or an attribute. There are many navigation improvements – for example, more use of mouse-over definitions, link and note creation and sharing, cross-reference previews, and the ability to view “in context.” However, instruction numbers are not planned since this is a truly web-based product. Policy statements will be visible on the same page as an instruction, via link. A later addition will be a graphic browser. Individuals and institutions can set preferences for views of policy statements, language, etc. Documents (such as those currently found on the “Resources” tab) and revision history will also be available. The Toolkit is still on target for a June 2018 release, with a follow-up release in September. The “old” Toolkit will be available for a one-year period, but will not be updated with any new RDA content.

The RSC (along with the RSC+ members) met in Madrid. This meeting was bookended with public events and also included a meeting of eleven translators. Much of the discussion focused on the modeling of serial and aggregating works, consideration of non-human personages (formerly cast as “fictitious entities”), and general guidance chapters for the RDA content in the Toolkit. Kathy also explained changes in the RSC governance structure. In short, ALA, CCC, and LC representative positions have been collapsed into a single North American representative position. NARDAC (“North American RDA Committee”) will consist of two representatives each from ALA, CCC, and LC with potential for additional representatives from Bermuda, Greenland, and Saint Pierre and Miquelon if/when they implement RDA.
NARDAC will function as an umbrella committee and is not meant to replace existing national committees. All RDA change proposals will funnel through NARDAC.

The RDA Pre-Conference was an in-depth look at key concepts, issues, and design of the restructured Toolkit. Video recordings of the presentations are available from links at this RDA blogpost.

The various sections of the pre-conference covered a demo of the Toolkit (James Hennelly), modeling of serials in IFLA LRM and RDA (Ed Jones), non-human personages (Amanda K. Sprochi), RDA data recording methods, transcriptions, and manifestation statements (Linda Barnhart), recording names and access points (Kathy Glennan), elements, attributes, and relationships (Linda Barnhart for Kate James), representative expressions (Kathy Glennan for Kate James), and Timespan (Kathy Glennan for Gordon Dunsire). Presentation slides for the sessions are available from the RSC website’s Presentations list.

ALCTS Committee on Cataloging: Description and Access (CC:DA)
The CC:DA blog contains the full agenda and links to various documents and reports.

After introductions, the adoption of the agenda, and approval of the minutes of the meeting held at ALA Annual, chair Tina Shrader delivered the Chair’s report covering activities from July-December 2017. The LC representative was unable to attend the meeting and provided a written report. The CC:DA 3R Task Group reported that they have done a comprehensive review of the 3R Project, reviewing nearly fifty documents before the Madrid RSC meeting. The group also reviewed the issues surrounding non-human personages and agreed on the necessity for a more extensive revision history. The PCC report contained information about work on the new strategic plan (2018-2021), updates on the URIs Task Group work, testing the use of limited punctuation in bibliographic records, and modifications to the implementation plan for RDA Authorities Phase 3. The MAC representative noted that MAC is still lively, considering it is supposed to be “dead.” The full MAC report will be posted following Midwinter.

Report of the ALA Representative to the RDA Steering Committee (Kathy Glennan)
Kathy explained the RSC governance structure changes to the group. NARDAC will represent the North American region; a chair has yet to be appointed. NARDAC does not replace CC:DA, but merely serves as a communication conduit for the North American region. Kathy is currently serving as ALA representative to NARDAC, but since she has been appointed incoming chair of the RSC, ALCTS will appoint a new ALA representative to NARDAC this fall. NARDAC (and the other regional groups) will have a presence on the RSC website. The working assumption is that all proposals brought to NARDAC will go forward to the RSC, with minority statements when there is a difference in opinion. NARDAC hopes to maintain a relationship with RDA policy statement authors, and provide materials to them as soon as practicable.

Kathy provided some highlights from the 3R project. Although the initial rollout date is in June, there is no expectation that libraries will implement the new Toolkit at that time. The RSC is working on the proposal process; it is felt that the current process is too lengthy and a more responsive process is desired. The initial round of change proposals will focus on refinement of content rather than addition of new content. Some new RDA elements came about as a result of the RDA Pop-up meeting at ALA Annual (see the presentation below). Other issues under discussion include coreness, non-human personages, provenance for data, nomen, and serials.
The RSC+ met in Madrid this past October. The outcomes document contains publicly available information from the meeting. The major topics for the meeting included viewing mockups of the new Toolkit, translations, serial modeling and clustering, aggregating works, non-human personages, and where to place various parts of the existing Toolkit into the new Toolkit (e.g., appendices, guidance chapters, etc.).

In closing, Kathy noted that this is the final report of the ALA Representative. There has been an ALA representative to the JSC or RSC since 1974 – even longer than Library of Congress!

Report from ALA Publishing Services and Presentation on the RDA Toolkit Changes (James Hennelly)

James reported that subscriptions are up and the renewal rates are good, continuing an upward trend. There has been an uptick in Toolkit usage and significant increases in page views and searches. Sales of books have been modest; these titles are not being updated until after the new RDA content is issued. The Norwegian translation will go live shortly. The English RDA content has been frozen until the new Toolkit is launched. ALA Publishing will provide basic navigation training for the new Toolkit.

James provided a summary and demonstration of planned Toolkit changes. The product is to be rolled out June 13, 2018 with the full English RDA text. A September 2018 release is planned to add translations and policy statement sets. There are many moving pieces to the process, but the timeline is not expected to change. Several issues, including revision history, instruction numbering, etc. are not yet settled.

Presentation on RDA Pop-up Meeting at ALA Annual 2017 (Kathy Glennan for Gordon Dunsire)

Presentation available at the RSC website.

Representatives of various specialized cataloging communities (including music and AV) were invited to a special RDA “Pop-up” meeting at ALA Annual 2017. The results of that discussion identified some low-hanging fruit to fold into the 3R Project, informed the RSC of issues for post-3R work, and was a way to explore ways of engagement with the broader community. Some new RDA elements (including opus number, thematic index number, serial number (music), among others) were added to the RDA Registry. Representative expression values used to identify and distinguish works were defined. The RSC will also be reviewing RDA alignment with the LRM and subsequent alignment with FRBRoo and PRESSoo (extensions of the CIDOC conceptual model).

New Directions for CC:DA (Diane Hillman)

Diane provided a brief explanation of her involvement with this group over the years and a framework for CC:DA to explore future directions. In the past, CC:DA has been involved in discussion, recommendation, and policy work but these have evolved to different tasks and groups. CC:DA needs to figure out how to remain a part of the process and see a focus change as an opportunity rather than a negative thing. Some questions and possible solutions that the group might address include thinking about the differences between closed and open worlds (i.e., libraries and web worlds), how to meet the needs of specialist communities, preparing ourselves (and future members) for change, evaluation of data, development of application profiles and vocabularies, and working with vendors in the data
distribution process. Diane offered a challenge to the group: Lead the change rather than resist the change! The group then embarked on an open discussion on several points raised in Diane’s presentation.

The meeting closed with several acknowledgements. An announcement of the passing of John Byrum, who served as the first ALA representative to the Joint Steering Committee for the Revision of AACR1, was made. Amanda Sprochi (Medical Library Association liaison) and Kathy Glennan (ALA Representative to the RSC), who are ending their terms, were recognized for their service. Dominique Bourassa will serve as the new ALA representative to NARDAC. The next CC:DA meeting is scheduled for June 23 and 25, 2018 at ALA Annual in New Orleans. An informal reception was held following the meeting to honor Kathy Glennan in celebration of her appointment as Chair of the RSC.

**ALCTS/LITA Authority Control Interest Group (ACIG)**

The ACIG meeting featured three presentations. Nancy Lorimer (Stanford University) provided an update on the work of the PCC Task Group on URIs in MARC. Portions of the presentation were drawn from presentations by Adam Schiff (University of Washington) and Paul Frank (Library of Congress and chair of the task group). The goals of the task group are to create a migration path from MARC to linked data, consistency of implementation of URIs in MARC fields and subfields, and to open up the possibility of using other vocabularies (e.g., ISNI and entity registries). Areas of work for the task group for the coming year include structural MARC issues, documentation, engagement with service providers, and creating best practices for URIs in authority records. The work of the task group is also tightly integrated with other task groups (e.g., MAC, BIBFRAME, faceted vocabularies, the ISNI pilot, identity management).

The second presentation was given by Nancy Sack (University of Hawaii at Manoa) and Amber Billey (Bard College) and discussed the background of and the Report of the PCC Ad Hoc Task Group on Gender in Name Authority Records. As way of background, Nancy described the various types of errors found in weekly reports from downloaded new and changed records. She is able to correct most of the errors, but it is a massive undertaking. Problems with gender terms follow much the same pattern as other categories of errors from the reports: terms used incorrectly (e.g., including age elements), singular vs. plural terms, typographical errors, etc. The original RDA instruction covering gender (RDA 9.7.1.3) included vocabulary but the controlled vocabulary was removed in February 2016. Gender terms now come from a variety of sources: AAT, ISO5218, LCSH, and LCDGT. Fortunately the PCC Ad Hoc Task Group on Recording Gender was formed with the goal of providing consistent, accurate representation. Amber then outlined several caveats for recording gender expression in an authority record. While some information is publicly available to be recorded in an authority record, other information may not be appropriate to record – and shared – via online identity sources that make use of authority record data. There is a need for instructions and best practices; though the task group produced a report in October 2016, the eight recommendations still await implementation. Next steps for the task group include a survey about the recommendations, review and incorporation of survey feedback into revised recommendations, and to advocate to update LCDGT as necessary.

The final presentation, “The Gestalt of Authority Work: Making Sense of Identity Management,” was given by Violet Fox. Authority work is moving away from its original purpose of forming unique heading
strings for library catalogs towards identity management, which captures information extraneous to heading string creation. Violet framed her presentation with a couple of case studies: Frieda Belinfante, a Dutch cellist, conductor, a prominent lesbian and a member of the Dutch Resistance during World War II who later immigrated to the United States, and in contrast, an undocumented immigrant political activist artist. Regarding the latter, what information would be placed in a national authority file? Catalogers must realize that information placed in authority records resides in a government database; catalogers do not control who uses the information and for what purpose.

One question that arises in the movement from authority control to identity management is “Who asked us to manage their identity?” Catalogers have a responsibility to the user, but there is also a responsibility to the person represented by the authority record. In an ideal scenario, people would be able to control their own information, or be able to opt out. Catalogers cannot solve information that libraries link to, but we can be good stewards of our data; we are no longer just categorizing things, but individuals.