**ALA Midwinter Meeting 2015, Chicago**
**Report from SAC (Subject Analysis Committee) and SAC-SGFI (Subcommittee for Genre/Form Implementation)**
**Submitted by Casey Mullin, Chair, MLA-BCC Subject Access Subcommittee**

**Subject Analysis Committee**

Presentation: What is an RDA subject? (Gordon Dunsire, JSC Chair)
Dunsire's presentation addressed the major lacuna in RDA: the chapters and appendices related to the FRBR Group 3 (or so-called "subject") entities that have yet to be written. Given that much has developed in the FR-family of models (including FRSAD and the impending consolidated FR model) since the initial release of RDA, a different approach to treating "subjects" in RDA is required. To wit, "subject" is not an entity unto itself, but rather a relationship between entities. After reviewing the FR models and making some predictions about what the consolidated model will look like, Dunsire proceeded to describe the changes to RDA that will be required to accommodate this revamped approach. These changes are slated for the April 2015 Toolkit release, and will include a new appendix M, which will accommodate "has subject" and various other types of cross-entity relationships. Sections of Appendix J dealing with descriptive work (J.2.3) and descriptive expression (J.3.3) relationships will need to be revised and incorporated into this new Appendix M.

Report of the liaison from the Library of Congress Policy and Standards Division (Janis Young)
LCGFT updates:
Music terms: In February 2015 PSD approved approximately 560 genre/form terms for musical works. The terms appeared on Approved List 1514 (http://classificationweb.net/approved-subjects/1514.html).

General terms: In January 2015 PSD approved approximately 175 "general" genre/form terms for inclusion in LCGFT. The terms describe works such as abstracts, dictionaries, periodicals, and yearbooks, which are not specific to a particular discipline, and also include some other terms that do not fall neatly into a particular discipline (e.g., logic puzzles; passenger lists).

The "general terms" project was a partnership undertaken by PSD and the ALA/ALCTS Subject Analysis Committee's Subcommittee on Genre/Form Implementation, which formed the General Terms Working Group. Additional information on this project may be found on the Acquisitions and Bibliographic Access website at http://www.loc.gov/catdir/cpso/genre_form_general_terms.html.

At this time, PSD has no plans to cancel any of the LCSH headings or form subdivisions that overlap with the "general' terms. Libraries choosing to implement the terms in their cataloging should assign them in addition to subdivided subject headings.

Literature terms: In March 2015 PSD will approve approximately 390 genre/form terms for literary works. The terms appear on Tentative List 1515 (http://classificationweb.net/tentative-subjects/1515.html), to be approved on March 2, 2015. PSD is requesting comments from the library community; please email Janis L. Young at jayo@loc.gov through February 18, 2015.

The literature genre/form project is a collaboration undertaken by PSD and the ALA/ALCTS Subject Analysis Committee's Subcommittee on Genre/Form Implementation, which formed the Working Group on LCGFT Literature Terms. More information on the literature project may be found at http://www.loc.gov/catdir/cpso/genreliterature.html.

Religion terms: PSD has received an initial slate of proposed terms and will move forward on them this year.

Assignment of New Genre/Form Terms: The Subject Headings Manual (SHM) will be revised in spring 2015 to reflect new policies on assigning genre/form terms to works of literature. Until the documentation is complete, PSD recommends that libraries wishing to implement the genre/form terms assign subject headings according to the existing policies in the SHM, along with the new genre/form terms.

LC Implementation of New Genre/Form Terms: The Library of Congress' Acquisitions and Bibliographic Access Directorate, which catalogs most of the textual works acquired for the Library's general collections, has not yet decided when it will implement the "general" or literature genre/form terms. Likewise, the Music Division and the Motion Picture, Broadcasting and Recorded Sound Division, which catalog books on music, music, and musical sound recordings, have not yet determined when they will implement the music genre/form terms in new cataloging. Separate announcements will be made when those details are available.

Publications:
All subject cataloging and classification publications are now freely available online in PDF form from the Acquisitions and Bibliographic Access website, http://www.loc.gov/aba.
New editions of the following resources will be available in February 2015:
• Library of Congress Subject Headings (37th edition)
• Library of Congress Genre/Form Terms for Library and Archival Materials (2015 edition)
• Library of Congress Medium of Performance Thesaurus for Music (first edition)
• Library of Congress Classification schedules (various editions)

Revision of manuals. Sixteen Subject Headings Manual (SHM) instruction sheets and three instruction sheets in the Classification and Shelflisting Manual (CSM) have been updated since the 2014 ALA Annual Conference.

Subscription-Based Access to Current Documentation. LCSH, LCGFT, LCMPT, and LCC remain available through Classification Web, LC's subscription-based service and the SHM and CSM are available through Cataloger's Desktop.

SACO:
The PCC Secretariat sponsored a SACO workshop entitled "Proposing New and Revised Topical Subject Headings" for about 30 SACO members on Friday, January 30th in conjunction with the ALA Midwinter Meeting. Janis L. Young was the principal presenter. The PCC Secretariat and PSD thank the University of Chicago for generously hosting the workshop on its campus.

At this time, PSD is not accepting proposals for new or revised genre/form terms in the three newly published areas (general terms, literature and music). Over the next several months, further work will be done to harmonize and tighten up the respective hierarchies within LCGFT. Proposals related to LCMPT terms can still be made, and should be submitted through the SACO Music Funnel.

Status of Library of Congress Demographic Group Terms (LCDGT):
LCDGT remains under development and will be used to describe the creators of, and contributors to, resources, and also the intended audience of resources. Terms from LCDGT will be coded in MARC 21 fields 385 and 386, for audience and creator/contributor characteristics, respectively, in bibliographic records and authority records for works. The Policy and Standards Division plans to approve the initial group of terms by the middle of 2015. The primary source for access to the approved terms will be Classification Web, and the terms will also be made freely available on LC's website.

Working Group on LCDGT
The Working Group on LCDGT (Library of Congress Demographic Group Terms) was organized after Annual (with Liz Bodian as Chair) and has been holding its discussions over email the past few months. The main outstanding topics, discussed at length at both SAC meetings, are:
- What language speaker groups should be established? And what should the syntax of those terms be? (French speakers vs. Speakers of French vs. French language speakers, etc.) Also, some language terms in LCSH are outdated and will need to be brought up to date before corresponding LCDGT terms are established.
- To what level of geographic granularity should demonyms be established? (continent, region, nation, sub-national region, state, city, etc.) And what about places that don't have established demonyms? Should the syntax be "Residents of [place]"?
- How should American and Non-American ethnic groups, including those "hyphenated" group terms consisting of two nationality terms, be handled? (i.e. Chinese Americans, Japanese Brazilians)
- A "prototype" set of terms will be available for discussion by June 2015. A complete (i.e., sufficient for initial release) LCDGT vocabulary should be ready by the end of 2015.

Report of the RDA Subcommittee (Robert Maxwell)
The RDA Subject Relationship Element proposal submitted by SAC earlier this year was considered by the Joint Steering Committee at their November meeting. This summary of their deliberations was provided by Kathy Glennan, ALA representative to the JSC:

The Joint Steering Committee:
- Generally accepted the ALA proposal, but did not approve ALA's proposed relationship designators.
- Revised the definition of subject relationships.
- Created Appendix M instead of repurposing Appendix L. The new appendix includes a placeholder for subject relationship designators, which will be moved here as part of another JSC decision from the November 2014 meeting.
- Changed the wording so that controlled terms will come from an "identifiable subject system" instead of an "authorized subject system".
- Revised the definition of unstructured description to add "etc."; this now can encompass keywords (which are mentioned in the Chapter 23 text).

Glennan was charged with creating a final version of the proposal, taking into account JSC revision requests, for inclusion in the 2015 RDA revision. This revised version has not been posted yet, but will appear soon as a "sec final" document at http://www.rda-jsc.org/working2.html#ala31. A working version is available at http://www.rda-jsc.org/docs/6JSC-ALA-31-rev.pdf.


## SAC Subcommittee on Genre/Form Implementation

Report from AALL (Yael Mandelstam)
The Classification and Subject Cataloging Policy Advisory Working Group (CSCAG) discussed the continued need to devise and test strategies in order to identify the bibliographic records for retrospective application of the law genre terms. The plan is to form small subgroups and divide the list of terms to test.

Since genre/form terms cannot be subdivided geographically, the CSCAG discussed the use of field 751 for jurisdiction information but concluded that this field is not ideal to record the jurisdiction associated with the work.  The CSCAG decided not to recommend this option. The Group will explore options for continuing to record the jurisdiction in the 6xx fields.

Genre/Form Terms Manual
Significant portions of the SGFI business meetings were devoted to work on the forthcoming LC Genre/Form Terms Manual (working title), which will likely be scoped to include other non-LCSH vocabularies as well. As a preliminary step of this undertaking, SGFI reviewed dozens of Subject Heading Manual instruction sheets and repurposed them for inclusion in a new G/F manual. This exercise raised many high-level questions about LCGFT practices in general. Many sections will be ported over largely intact while others are not applicable at all. Still others required thoughtful reconsideration (e.g., the 20% rule, rule of three, rule of four, etc.).

Instructions relating to music genre/form and medium terms will be developed by MLA in collaboration with LC. PSD will draft a basic LCGFT "music memo" and MLA and LC Music Division/MBRSD will flesh it out. LCMPT practices will be specified in a separate instruction sheet, and will be based largely on MLA's provisional best practices.

Another task related to the forthcoming LC manual is to revise the definition of "form/genre." This revision will be incorporated into LC's Introduction to LCGFT (http://www.loc.gov/aba/publications/FreeLCSH/gftintro.pdf). A SGFI working group, composed of domain experts covering all of LCGFTs extant areas, has been convened to draft this revision; Mullin is serving on this working group.

Proposal for Relator Terms for use with 751 Fields
SGFI Developed a proposal to the LC Network Development & MARC Standards Office for three new relator terms/codes that could be used in conjunction with geographic names in MARC bibliographic field 751:
- Origination place [orp] - A place from which a work or expression originated
- Capture place [cap] - A place associated with the capture (i.e., recording, filming, etc.) of the content of a resource
- Discovery place [dvp] - A place where a natural object or artifact was discovered

The proposal was approved by SAC and forwarded to NDMSO on November 10, 2014. As of this report, LC has not announced any action on the proposal.

Other Updates Related to LCGFT and LCMPT for Music
Work on retrospective conversion of LCSH headings denoting form/genre/medium/etc. of musical works has commenced within MLA-BCC. Though MLA will take the lead on design of the algorithms (with pledges of assistance by Gary Strawn (Northwestern University)), OCLC, PCC and LC will need to be involved in testing and possibly in design. To this end, MLA will issue a white paper in the coming months.

A presentation at SAC at ALA Annual in San Francisco, entitled "Coming to Terms", will showcase all of the new and developing LC-sponsored vocabularies, including LCGFT, LCMPT and LCGFT. Hermine Vermeij (UCLA) will represent the music community in this presentation.