

PCC SCS Task Group on Evaluation Guidelines for Non-Latin Script References in Name Authority Records

Interim Report, October 20, 2023

Charge:

The SCS Task Group on Evaluation Guidelines for Non-Latin Script References in Name Authority Records is charged to:

- Consider and respond to the questions outlined in the charge (see [full charge](#)) and other issues and recommendations as raised in the PCC White Paper and SCA and SCS reports
- Survey and communicate with stakeholders in the non-Latin script NACO funnels and cataloging communities, to identify existing guidelines and best practices; to determine gaps, needs, and desired outcomes; and to understand the extent to which consensus and alignment of practice across script-based cataloging communities is possible or desirable
- Develop and propose guidelines needed to support evaluation, formulation, and revision of non-Latin script references in Name Authority Records, including supporting documentation (such as FAQ, examples, or training materials, consulting with the Standing Committee on Training (SCT) as needed)
- Make recommendations regarding timeline and strategies for evaluation and updating of existing records where appropriate (for example: establish a “Day One” for implementation; suggest coordinated projects; identify categories of records amenable to machine processing)

Membership:

Iman Dagher (Co-chair) (University of California, Los Angeles), Representative for Standing Committee on Standards, Arabic NACO Funnel, and ALA/Core Committee on Cataloging: Asian and African Materials

Shi Deng (Co-chair) (University of California, San Diego), Representative for CJK NACO Funnel

Erica Chang (University of Hawai‘i at Mānoa), Representative for CJK NACO Funnel Reference Project

Bob Maxwell (Brigham Young University), Representative for Greek script, NACO trainers, and NARDAC

Adam Schiff (University of Washington), Representative for NACO trainers and NARDAC

Jasmin Shinohara (University of Pennsylvania), Representative for Hebraica NACO Funnel

Naomi Shiraishi (University of California, Berkeley), Representative for CEAL Committee on Technical Processing

Larisa Walsh (University of Chicago), Representative for ACRL/ESS Slavic Cataloging and Metadata Committee

Jessalyn Zoom (Library of Congress, Acquisitions and Bibliographic Access Directorate, Asian and Middle Eastern Division), Representative for Library of Congress and ALA-LC Romanization Review Board

Meetings and Conduct of Business:

The Task Group was charged by the PCC Standing Committee on Standards on August 16, 2023 and formed with members representing non-Latin library communities, including Arabic, Cyrillic, Chinese, Hebrew, Japanese, Korean, Greek, and representatives from NACO and NARDAC. The co-chairs held separate meetings for planning and coordinating purposes. The TG's kick-off meeting took place on August 29, 2023. The members agreed to meet every two weeks with additional meetings scheduled as needed. Subsequently, the team held four additional meetings on the following dates: September 18, October 2, October 9, and October 16. Recordings of the meetings are made available for members as a reference. TG members collaborated through the creation and updating of Google documents. We also communicated through email to ensure effective communication within the team.

The recordings of meetings and working documents are located in a [Google Drive folder](#) that is accessible to all members of the Task Group.

Plan for Carrying out the Charge:

The Task Group has determined that the most effective approach to fulfill the assigned tasks is to focus on the following tasks:

- 1) Establishing a set of guiding principles for collaboration and accomplishment of the charge and deliverables;
- 2) Examining and addressing the five questions outlined in the Charge.
- 3) Developing a plan to survey the different non-Latin script NACO funnels and cataloging communities to identify existing best practices/guidelines.
- 4) Defining the evaluation process for existing non-Latin script references in name authority records.
- 5) Identifying best practices and guidelines needed when adding/updating non-Latin script references

Tasks Completed:

The TG established Guiding Principles to work together to meet the charge and deliverables

The Guiding Principles are:

- Affirm the value of and need for non-Latin script variants in order to improve discovery of library materials.
- Prioritize the end-user experience, reduce or eliminate barriers for users to discover, access, and effectively use non-Latin language resources that libraries provide. Catalogers are users too.
- To the extent possible, base decisions on evidence. When needed, collect evidence through surveys or other means.
- Follow the [PCC Guiding Principles for Diversity, Equity, and Inclusion for Metadata Creation](#).
- Consider the [PCC Guidelines for Creating Bibliographic Records in Multiple Character Sets](#) and other related documentation, and recommend changes to them if needed
- Emphasize that Non-Latin policies and procedures should follow the same policies and procedures as Latin script materials unless there is an important reason specific to non-Latin materials for such policies to differ, such as user experience
- Standardize practices for non-Latin scripts where necessary and reasonable. In cases where it is unnecessary to follow a standard practice, leave decisions to cataloger judgment (i.e. don't standardize simply for the sake of standardization).
- Recognize that all non-Latin communities are different and may have special needs that necessitate different practices.

Tasks In Progress:

- In our attempt to fulfill the first charge “Consider and respond to the questions and other issues and recommendations as raised in the PCC White Paper and SCA and SCS reports,” the TG created a separate document for each of five questions.
- After initial discussion, the TG agreed to address the fourth question as the first step. We determined that there is a need to designate a specific reference in the original script as “preferred”. We are currently working on the document to

support the practice and adding the different scenarios/situations related to different communities with illustrated examples.

- As we address the 4th question, we are also in the process of identifying and developing guidelines needed to support evaluation, formulation, and revision of non-Latin script references in Name Authority Records.

Tasks to Complete:

- Continue to discuss and address all five questions.
- In order to develop recommended instructions, the TG would like to test reference evaluation in NAF with a special 667 field note explaining that this is a test and others should not begin non-Latin reference evaluation until the implementation date.
- Survey and communicate with stakeholders in the non-Latin script NACO funnels and cataloging communities to identify existing guidelines and best practices. Determine gaps, needs, and desired outcomes, and assess the extent to achieve the desired consensus and alignment of practice across script-based cataloging communities.
- Develop and propose guidelines needed to support evaluation, formulation, and revision of non-Latin script references in Name Authority Records, including supporting documentation (such as FAQ, examples, or training materials, consulting with the Standing Committee on Training (SCT) as needed)
- Make recommendations regarding timeline and strategies for evaluating and updating existing records where appropriate (for example: establish a “Day One” for implementation; suggest coordinated projects; identify categories of records amenable to machine processing)