The Anglo-American Cataloguing Rules are entering an era of significant change. The text has now been published as an updating looseleaf, and annual updates will be issued. At the same time, the Joint Steering Committee for Revision of AACR is working towards a new edition of the rules, designed to position the code within an emerging global cataloging environment. Over the next several years, major parts of the rules will be significantly changed. As always, the ongoing revision of AACR is a highly consultative process, and the views of the community of catalogers will be needed. In an effort to inform that community of the ongoing process, CC:DA will be posting regular reports.


The Immediate Future: the 2002 Revision and the 2003 Amendments Package

The 2002 Revision of AACR2 was published in September 2002. It contains, among other things, major revisions to Chapter 3 (Cartographic Materials) and Chapter 12 (now Continuing Resources). The introduction of integrating resources in the revised Chapter 12 is a very significant change to the rules. All catalogers should take a look at the orientation materials such as those prepared by the Library of Congress Cataloging Policy and Support Office, the Program for Cooperative Cataloging (PCC), and an OLAC CAPC Task Force.

LC CPSO http://www.loc.gov/catdir/cpso/
PCC BIBCO http://www.loc.gov/catdir/pcc/bibco.html
OLAC CAPC http://ublib.buffalo.edu/libraries/units/cts/olac/capc/

The 2003 Amendments Package, on the other hand, is relatively modest, containing only a few minor modifications to existing rules. The most significant feature of the package will be a full revision of the index to the rules. The 2003 Amendments should appear in July or August 2003, and will be issued as replacement pages for the loose-leaf text of the 2002 Revision.

One set of revisions that was expected to appear in the 2003 Amendments will not in fact appear. The revisions to Chapter 9, which were to include the elimination of Area 3 (MARC tag field 256) and further changes to the rules for physical description of electronic resources, were not completed in time. They will appear, one hopes, in the 2004 Amendments.
The Future of the Cataloging Rules — AACR3

The Joint Steering Committee for Revision of AACR has embarked on an ambitious program leading to a new edition of AACR, which is now being referred to informally, but publicly, as AACR3. JSC’s strategic plan will shortly be posted on the JSC Web site at http://www.nlc-bnc.ca/jsc/ and work towards the new edition has already begun. Among the most significant features are:

- **Incorporating FRBR terminology and concepts:** JSC is working with a volunteer consultant, Pat Riva of McGill University, to analyze the terminology in AACR2 in the light of some of the terms and concepts in the IFLA Functional Requirements for Bibliographic Records. Specifically, the FRBR terms work, expression, manifestation, and item are to be used in AACR in a manner consistent with their definitions in FRBR. The terms expression and manifestation are new to AACR, and the term work is already used appropriately; however, the term item in AACR is not consistent with the FRBR definition, and much discussion has been devoted to this question. A revised proposal will be considered by JSC in April and may be approved. However, the changes in terminology need to be coordinated with other, related revisions and are unlikely to be published for a few more years.

- **Revised, conceptual introductions to the rules:** JSC has determined that the General Introduction to the code, as well as the Introductions to Parts I and II, need to be significantly expanded to provide a conceptual background for the application of the rules. As a first step, Barbara Tillett of the Library of Congress drafted a statement of the principles underlying the rules. Subsequently, the Chartered Institute of Library and Information Professionals (CILIP) and the British Library prepared drafts of the revised introductions. Further progress has been delayed by the need to incorporate additional sections based on other initiatives (such as an explanation of the use of FRBR terminology described above). JSC will discuss methods for continuing this work at their meeting in April.

- **Increasing consistency and reducing repetition in rules in Part I of the rules:** In partial response to a recommendation from Tom Delsey and the JSC constituencies to reconsider the organization of Part I, JSC asked ALA to undertake a project to examine the consistency of rules across Part I, propose revisions to eliminate unnecessary inconsistencies, and to move general rules from chapters 2–12 into chapter 1. Once this process has been completed, it will be possible to determine (a) the extent of the special rules in chapters 2–12, and (b) the exact types of material to which those special rules apply. In Philadelphia, CC:DA approved proposed revisions relating to Areas 2 (Edition) and 3 (Material-Specific Details); these proposals will be considered by JSC in April. Meanwhile, the CC:DA Task Force will be working on Areas 4 (Publication, distribution, etc.), 5 (Physical description) and 6 (Series). It will probably take another year or two before proposals for all of the areas have been drafted and approved. Publication of the changes will not take place until all of the revisions have been approved and will be coordinated with other changes to the text that are considered part of the anticipated new edition.
Reconceptualizing the scope of chapter 9 (Electronic resources): In its discussions on revising chapter 9, ALA suggested that the scope of the chapter has become part of the problem, and that it would make more sense to limit the scope of chapter 9 to a smaller class of materials (e.g., computer programs, games, online services) and to provide rules for describing the electronic carrier aspects of digital versions in the chapter appropriate to those types of resources (i.e., digital maps in chapter 3, digital sound recordings in chapter 6). ALA and the British Library were asked to form a joint working group to examine this question and to prepare revision proposals. That Task Force was just formed and presented a preliminary report in Philadelphia; it hopes to have a final report for the June ALA meeting in Toronto, although the issues may be too complex to be solved quickly.

Thorough revision of chapter 21: Chapter 21 was the object of a number of recommendations from Tom Delsey in his *Logical Analysis of the Anglo-American Cataloguing Rules*. JSC began with one specific recommendation, to reconsider the “Rule of Three” which artificially limits the number of added entries that a cataloger is instructed to make. In addition, JSC would like to restate the rules for choice of entry in terms of the relationships among entities that are listed in the *Functional Requirements*. JSC is preparing terms of reference and is looking for a consultant to do this work.

Creating a new Part Three on authority records: The Library of Congress has proposed that the current chapters 22–25 on form of heading become the core of a new Part III of AACR, which would contain explicit instruction on creating authority records and would include rules for form of heading, for providing references from variant forms and related headings, and for providing other authority record content (e.g., numeric identifiers, notes). In a related activity, JSC’s Format Variation Working Group has prepared revisions to chapter 25 (Uniform titles) which would include instruction for creating identifiers for not only works, but also for expressions and manifestations — again providing support for concepts from the *Functional Requirements*.

All of these initiatives add up to a significant revision of AACR2. While work on most of them is already underway, the various tasks are closely interrelated and therefore require considerable coordination. Although some hope for publication of the new edition by the end of 2005, this is likely to be overly ambitious. In any case, these efforts to substantially revise AACR will be a busy, fascinating process over the next few years.

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