

To: RDA Steering Committee
From: Kathy Glennan, RSC Chair
Subject: Outcomes of the October 2019 RSC Meeting

The fifth in-person meeting of the RDA Steering Committee (RSC) was held on 21-25 October 2019 in Santiago, Chile.

The meeting focused on planning for the post-3R Project (**RDA Toolkit Restructure and Redesign Project**) environment, including a deeper dive into some of the more challenging areas of RDA content.

Participants included:

Catherine Amey, Oceania representative
Linda Barnhart, RSC Secretary
Renate Behrens, Europe representative
Thomas Brenndorfer, North America representative
Gordon Dunsire, Technical Team Liaison Officer
Kathy Glennan, RSC Chair
James Hennelly, ALA Digital Publishing
Kate James, RDA Examples Editor
Ebe Kartus, Wider Community Engagement Officer
Honor Moody, RDA Examples Editor-Elect
Chris Oliver, Chair, RDA Board
Daniel Paradis, Translations Team Liaison Officer

Ángela Quiroz Ubierna, RDA Board member and local host to the RSC, also attended as an observer.

The RSC deeply thanks Ángela Quiroz Ubierna and the staff of the Biblioteca del Congreso Nacional de Chile for their generous hospitality throughout the week under quite extraordinary circumstances.

Unfortunately, the three-day “Segundo Coloquio sobre RDA en América Latina y el Caribe,” with an expected attendance of over one hundred people from across the hemisphere, had to be cancelled. This meeting was to have been a step toward building a formal Latin American/Caribbean regional organization as the region prepares to join the RSC. [Presentations prepared for the first day of the colloquium](#) by RSC members were posted on the RSC website and were shared directly with the registered attendees. These include information from each of the three RSC regional representatives about how their regional areas organized themselves and how they operate. The RSC was disappointed that the colloquium was cancelled but will find other ways to assist in this effort.



Photo: Javier Mardones

The RSC in the Biblioteca del Congreso Nacional de Chile. Front row: James Hennelly, Renate Behrens, Catherine Amey, Linda Barnhart. Second row: Kathy Glennan, Ebe Kartus, Honor Moody, Chris Oliver, Thomas Brenndorfer. Third row: Kate James, Gordon Dunsire, Daniel Paradis.

General Outcomes

The RSC reconfirmed that the text of the English language RDA is stable and has been since April 2019. For the past six months, work has proceeded on translations, policy statements, application profiles, and other related tasks, such as MARC 21 mapping. However, stable does not mean frozen; we continue to fix typos and make other editorial changes that do not have significant impact.

The number of feedback messages has been diminishing over time, which is an indicator of stability. The RSC continues to consider all feedback, however, and is [grateful to those who have taken the time to](#)

[submit their questions and ideas](#). Please continue to use the [feedback form](#) for observations and questions.

The 3R Project for the English text of RDA is now considered to be complete. It accomplished its goals of:

- Rebuilding the instruction repository to bring it in line with current data management best practices, make RDA data more modular and dynamic, and allow the RSC to track and manage a greater range of metadata associated with the instructions
- Adopting responsive design
- Bringing the site in compliance with established accessibility standards
- Making improvements to Toolkit navigation, display, and features to create a user experience that is more intrinsically of the web.

With this now-stable technical platform, RDA is in a much better position for continuous content development. RDA has an integrating, indeterminate work plan; there will always be changes. The RSC welcomes proposals for substantive changes to RDA content but will hold implementation of approved changes until 2021 to allow our partner organizations to continue to work with a stable text in 2020. Guidelines for submitting proposals may be found in [RSC/Operations/5](#).

The RSC also reconfirmed the new plan for the steps marking 3R completion. See the [announcement](#) for details. Key components of the new plan are:

- A hard date for the Switchover of the Beta Site to official RDA status has been set at December 15, 2020.
- The Switchover date and the start of the Countdown Clock on the original RDA Toolkit are no longer linked.
- The start of the year-long Countdown Clock will be determined by full agreement of the RDA Board and RSC; this agreement will likely occur sometime in 2021.

Internationalization

The RSC is acutely conscious of the demands that internationalization of this standard requires.

In terms of RDA content, the RSC gives careful attention to precise and consistent language for ease of translation, and to software and processes to facilitate translation and policy statement preparation. The RSC is increasingly aware of and is taking steps to remove the Anglo-American focus of the content. Non Anglo-American communities are supporting this process, such as the EURIG Examples Working Group, which is providing examples for more international reuse.

In terms of RSC processes, additional time must be built in for the translation of briefing papers and announcements, and much flexibility has been asked of RSC members in finding times for global conference calls. Asynchronous meetings will help mitigate the time zone challenges. An asynchronous meeting is fully managed online and allows for participants to make online comments when convenient in their time zone. The RSC intends to schedule three quarterly asynchronous meetings and one in-person meeting in 2020.

The RSC received a draft report by Ahava Cohen (National Library of Israel) “Western and Christian Bias in the 3R Toolkit.” The committee will address some specific concerns from the report now, but fuller consideration will require the establishment of a Working Group. This will be a part of the RSC’s new three-year operational plan (see [RSC Communication and Work Processes](#)).

The Italian and the Finnish translation teams have finished translating RDA Reference data and have moved on to translating boilerplate (also called re-used) text in RDA before moving on to individual RDA instructions.

RDA Content

The RSC began what will be an ongoing conversation in examining and refining the purpose and use of the Resources tab. The current groupings under this tab—content derived from the RDA Registry, the former Appendices, and other miscellany—are not self-evident. The groupings need a rationale and structure, and the official and unofficial pieces of RDA must be identified.

Responding to feedback about the Toolkit experience, the RSC began a closer look at the string encoding scheme (SES) and punctuation pattern options that are found primarily in authorized access point and variant access point instructions. The group discussed relocating some of these instructions to a more centralized place—perhaps the Resources tab—for more clarity and less redundancy. This might be similar to the role of Appendix E in the original Toolkit. The group agreed to go ahead and test this approach, noting that this would not destabilize the text, as instructions would be relocated but not removed. Translators and policy statement writers will nonetheless be notified to hold off work on specific elements until the new location is established early next year.

The group continued its discussion of the Collective Agent entity, moving ahead with new ideas raised at its September 2019 asynchronous meeting. It was agreed that the next step could be a future Working Group to explore creating a new entity under Collective Agent for meetings, conferences, congresses, expeditions, exhibitions, festivals, fairs, etc. The new entity would need to be defined so it does not overlap with the Family or Corporate Body entities. This would be a refinement of the LRM model.

The briefing paper “Work boundaries” provided a description of the issues in determining the circumstances under which a new work should be described. The RSC agreed that text about work boundaries should be incorporated in a separate Guidance chapter.

The briefing paper “RDA metadata implementation scenarios” outlined enhancements to the original RDA database implementation scenarios that reflect the structure and content of the new Toolkit. It also made recommendations for updating the scenarios and proposed a draft text and layout for incorporating the revised scenarios in the beta Toolkit. There was agreement and support for this; the original scenarios will be retained, and a scenario for linked open data will be added. The order of the scenarios will be from the most to least sophisticated. Final placement of this information (in Guidance or in Resources) was not decided.

The briefing paper “Expression excerpts” discussed issues in recording extracts of expressions and how they can be resolved. The paper identified two kinds of expression excerpts: a collection aggregate (compilations of opening lines of poems, quotations, excerpts from musical recordings, etc.) and an

augmentation aggregate (a critical study on a monologue from a play, a monologue from a play used to illustrate a text on contemporary drama conventions, etc.) The RSC will consult with experts and communities and will discuss the principles and recommendations further.

The briefing paper “RDA Content Elements” made recommendations for developing expression “content” elements (such as colour content and illustrative content) to conform to the aggregates model. The RSC will consult with experts and communities and will discuss the principles and recommendations further.

Beta Toolkit Design and Functions

The RSC requested and received a report from the North American RDA Committee (NARDAC) to examine RDA element labels, including the potential adaptation of element labels from the RDA unconstrained element set for public display. As a reminder, RDA element labels are not intended for public display. Labels are technical and artificial terminology that must be unique, short, and consistent; in a sense, they are a substitute for IRIs in a non-linked data environment. Given that, the RSC wondered if it would be useful to suggest labels for public display and include them as part of the Toolkit. The unconstrained element set might be a good starting point for this work, as the labels already do not include domain or range identification. The NARDAC report raised a number of issues as well as identified some errors. NARDAC was thanked for their work and will be asked for further followup before decisions are made.

The group reaffirmed the Revision History/Release Notes approach that was tested in the September 2019 release and will continue on this path.

A new idea arose in re-thinking the list of elements at the end of each entity chapter, to enable the sorting of relationships and attributes. This will be tested.

The RSC continued discussion of ways to stabilize and improve the Relationship Matrix, including exploring alternative interactive features.

The group noted that improvements continue in the functionality of the new backend to the [RDA Registry](#) and was reminded that [GitHub releases](#) of up-to-date Registry data are free and available to everyone.

The RSC agreed that the naming of the releases of the RDA Toolkit for citation purposes is desirable. It is standard for a publisher to label each release. The group agreed to a month and year format; thus, the current version of the beta site is “RDA September 2019.”

RSC Communication and Work Processes

Based on the experience of several recent Fast Track test cases, the RSC worked through some details of Fast Track proposals and processes. For the foreseeable future, Fast Track proposals will only be for minor or editorial changes. If a major change to RDA is needed, it must come as a full proposal.

There was more discussion of formal proposal processes. Proposals can be made by communities through their regional representatives at any time and will be scheduled and considered at asynchronous meetings. Moving from annual in-person meetings to a combination of one in-person and three asynchronous meetings means that major changes to RDA can now be implemented several times a year. The RSC intends to post all formal proposals on the RSC website with a note about the date of discussion.

The Application Profiles Working Group was officially approved, including the proposed membership and Terms of Reference. A chair is being sought. The term for this task-and-finish group is 2020-21.

The RSC supported adding five translators to the Translations Working Group for the five official partial translations, noting that all official translations should be members of the Working Group. Partial translations are translations only of RDA Reference, not RDA instructions. Previously, partial translations were represented by a single member.

The membership of the Technical Working Group is being refreshed, and their Terms of Reference and task list are being updated.

The RSC representative on the MARC/RDA Working Group (not an RSC working group, but rather one formed by the Library of Congress) is Ebe Kartus. The RSC looks forward to the group's progress in aligning MARC 21 with the beta Toolkit and is prepared to support this effort as needed.

At the request of the RDA Board, the RSC will develop a rolling three-year operational plan that will be harmonized with the "RDA Strategic Plan 2020-2022." Both the RDA Board and the RSC will have separate operational plans to support the overall strategic vision. A draft will be prepared which, when finalized, will give a clearer public picture of anticipated RSC work for the next two to three years.

The RSC recognized and thanked Kate James for her work as RSC Examples Editor. She steps down on 31 December 2019 to be succeeded by Honor Moody.