

To: Joint Steering Committee for Development of RDA

From: Gordon Dunsire, Chair, JSC

Subject: Proposal and discussion paper guidelines

Below are guidelines for preparing a proposal for revision of RDA or a discussion paper about issues related to RDA. A sample proposal accompanies this document.

As noted in 6JSC/Policy/1/rev, any proposal or discussion paper submitted to the JSC is posted on the JSC website for open access and to facilitate responses. So, by submitting a document, the submitter acknowledges that the JSC may post the document in full on its website.

Checklist for preparing an RDA revision proposal or discussion paper

1. Ensure that the proposal is in harmony with the current *Strategic Plan* and the *Objectives and Principles for RDA* (<http://www.rda-jsc.org/docs/5rda-objectivesrev3.pdf>).
2. Write the proposal in clear English and unambiguous wording. Take care to use specific RDA terminology in the correct context.
3. Include the sections shown in the list and sample proposal at the end of this checklist.
4. For guidelines on JSC document numbering, see 6.8 in 6JSC/Policy/1 (<http://www.rda-jsc.org/docs/6JSC-Policy-1-rev.pdf>). If the proposal is not from a JSC constituent body or from an international group with which the JSC is affiliated, the Chair of JSC will determine the document numbering; submit such a proposal to the Chair of JSC.
5. Apply the guidelines in the Editor's guide (<http://www.rda-jsc.org/docs/6JSC-RDA-Editor%27s-guide-rev-2.pdf>) and its three appendices:
 - appendix A for recurring phrases;
 - appendix B for vocabulary changes during the 2011-2013 rewording project (do not re-introduce wording changed during that project);
 - appendix C for examples.
6. Give specific* recommendations for revision of RDA instructions:

- use the latest version of RDA from RDA Toolkit;
- clearly identify and number the recommendations;
- give two versions of each recommendation:
 - a marked-up copy with strikeout for deletions and double underlining for additions
 - a clean copy showing the wording of instruction and examples if proposed changes were accepted
- include the remainder of the instruction, truncated if lengthy, to provide context if revising only one part of an instruction; when truncating, indicate the omission of content with a paragraph in square brackets such as “[remainder of instruction omitted]” or “[1st-3rd paragraphs omitted]”;
- may omit examples if no changes, additions, or deletions to examples are being proposed; indicate the omission with a bracketed phrase such as “[examples omitted]”;
- determine if recommendations affect examples in other instructions;
- determine if references to instructions being revised are given in other instructions and if changes are needed in the wording of those other instructions;
- ensure that all related instructions are identified and evaluated for possible revision.

* If specific recommendations for revision are not yet formulated but there are issues to be raised with the JSC, submit a discussion paper rather than a proposal.

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Sections to be included in a proposal or a discussion paper to the JSC:

- document header:
 - JSC document number -- see 6.8 in 6JSC/Policy/1 (<http://www.rda-jsc.org/docs/6JSC-Policy-1.pdf>)
 - date, in day-month-year order, of the proposal or discussion paper
 - page numbering (e.g., 1 of 5) if a multi-page document
- to/from/subject block:
 - “To” statement naming the JSC
 - “From” statement identifying the individual or corporate body submitting the proposal
 - “Subject” statement consisting of a short title and the instruction numbers affected
- reference to related document(s), if appropriate, with document number(s)
- abstract
- justification for the suggested revision(s)

- statement of the issue(s) requiring resolution
- estimate, if appropriate, of the impact of the revisions (impact can be in various areas: responding to concerns of RDA users; affecting how RDA could be implemented in other information communities; affecting legacy data)
- specific recommendation(s) for revision to instructions and glossary, with suggestions for additions, deletions, or changes to examples (note that the JSC Examples Editor has final authority on examples in RDA)
- revision of other instructions or examples in other instructions affected by changes in proposed revision(s)
- list of other instructions containing references to instruction(s) to be revised
- indication, if appropriate, of any changes to the RDA element set
(<http://www.rda-jsc.org/docs/6JSC-RDA-element-analysis-table-rev-2.pdf>)

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See the accompanying SAMPLE proposal: 6JSC/Sec/81.