

To: RDA Board
and
RDA Steering Committee

From: Gordon Dunsire, Chair 2013-18, RSC

Subject: Annual report for 2018

This is the Annual Report of the RDA Steering Committee (RSC) to the RDA Board for the calendar year 2018. The Chair of the RSC (2013-2018), Gordon Dunsire, prepared the report with assistance from the RSC and RSC Secretary, Linda Barnhart.

The RSC met in person from October 22-26, 2018 at the McGill University Library in Montréal, Québec, Canada. The group also conducted business through monthly teleconferences for the second half of the year.

3R (RDA RESTRUCTURE AND REDESIGN) PROJECT

The 3R Project was the major focus of the RSC core team for the full extent of 2018. The core team expanded to include the Chair-Elect, the RDA Translations Team Liaison Officer, the Wider Community Engagement Officer, and a representative of Policy Statement writers. To manage the project, the core team held regular weekly conference calls and met in person before and after the RSC meeting and the two ALA meetings.

The most important milestone achieved in 2018 was the public release of 3R Project beta site on June 13. Components of this release of the English language version of RDA included:

- An initial implementation of LRM
- Reorganized RDA instructions
- Redesigned Personal and Institutional Profile capabilities
- Search and navigation functions
- Cross-Reference and Cross-Reference Preview functions
- Ready Reference feature for each RDA element
- Introduction of responsive design and greatly improved accessibility to the overall site.

The beta Toolkit is a work in progress and not a completed site. It is not the final and official version of RDA content; the current, non-beta Toolkit remains the official version of RDA until public notice is given.

The beta site will remain in beta status until the RDA Steering Committee, the RDA Board, and the RDA Co-Publishers have unanimously agreed that the redesign of the site is complete, the RDA standard text is stable, and the full site content (translations and policy statements) is available. Shortly after that decision, public notice will be given, and the beta site will become the official RDA

site. The current site will remain available for one year following that notice to allow for a smooth transition.

Other public-facing Toolkit milestones achieved in 2018 include:

Date	Development
January 5	Move of Toolkit servers (minor service interruption)
February 13	Norwegian translation (corresponding to April 2017 English version) published on original Toolkit site, as well as corrections to Finnish translation. This is the final release for the original site
June 13	Public release of beta site. Alpha site becomes staging site
June 18	Update of content to beta site prior to demonstrations at ALA Annual meeting
August 16	Release to beta site to update content and functionality
October 9	Release to beta site to update MARC mappings, add Dublin Core mapping, and update content and functionality
October 24	Update of content to beta site to correct errors and add new content
December 12	Release to beta site with changes to appellation element content and to update infrastructure

Upon the public release of the beta site, the core team formally shifted from the “core team phase” of the project to the “RSC phase.” The RSC phase increases internal consultation and includes formal approval processes.

RDA Content

This year’s work in RDA content was primarily the refinement of concepts, structures, and elements. Work on aggregates and diachronic works continues. General guidance chapters were drafted. There was resolution to the treatment of non-human personages. With the addition of many new elements (including their inverses), generic instructions were developed and applied.

For further information, see the following documents on the RSC website:

[RSC/Chair/19](#) was distributed at the time of the June beta site release and provides an overview of the changes to RDA content up to that release.

[RSC/Chair/20](#) is a discussion paper jointly prepared with the ISSN International Centre on Issues on IFLA-LRM alignment for serials and other continuing resources.

[RSC/Papers/1](#) discusses issues with RDA Toolkit instruction numbering and requests help from cataloguers to come up with an implementable citation numbering scheme.

[RSC/Outcomes/2018](#) is the public report of the outcomes of the RSC annual meeting in Montreal.

RDA Reference

RDA Reference data is used to populate the Glossary, vocabulary encoding scheme term lists, relationship matrix, and sections of each element “page” in the beta site. It is also used in the current Toolkit site, including translations.

Updates to RDA Reference and other data included in the RDA Vocabularies in 2018 focused on interim changes to element sets and value vocabularies arising from the 3R Project.

These changes are reflected in a series of 12 GitHub pre-releases of RDA Vocabularies, numbered as versions 3.0.1 to 3.0.12. The pre-releases were used to test the development of the infrastructure for the production of the Toolkit, and to populate the beta Toolkit so that the effects of changes could be monitored. The pre-releases are annotated as being too unstable for use in operational applications.

Significant changes include the addition of notations for RDA value vocabularies for use as identifiers, and the addition of explicit elements for the Agent entity sub-types of Collective Agent, Person, Family, and Corporate Body.

The meta-elements were re-allocated to other element sets as a result of the development of instructions for data provenance.

The number and types of elements published by the end of 2018 are:

- 1041 Agent canonical properties
- 531 Expression canonical properties
- 136 Item canonical properties
- 401 Manifestation canonical properties
- 167 Nomen canonical properties
- 51 Place canonical properties
- 29 RDA Entity canonical properties
- 57 Timespan canonical properties
- 587 Work canonical properties
- 1043 Unconstrained properties
- 33 RDA/ONIX Framework elements
- 13 Classes

There were 41 value vocabularies published by the end of 2018.

No posts were made to the RDA Registry blog. 3 issues raised in the GitHub RDA-Vocabularies project were closed; 38 remained open at the end of 2018.

RDA Translations

The topic of RDA translations continues to be a significant focus of discussion in 3R Project planning. Stabilization of the English text is a major goal for 2019 and is driven by the need for translators to have an unchanging text in order to begin their work.

The full text of RDA is available in eight languages (Catalan, English, Finnish, French, German, Italian, Norwegian, and Spanish) and RDA Reference has additional translations with more in progress.

An in-person meeting of translators was conducted by Translations Team Liaison Officer Daniel Paradis on May 23, 2018 in conjunction with the EURIG annual meeting. A new email list and wiki was established to facilitate communication.

Forty-one RDA value vocabularies were released to the translators on July 12, 2018, with a deadline of December 2018 for translation. The staged release of other parts of RDA to the translators is planned in early 2019.

PEOPLE

RSC Membership

The Oceania RDA Committee (ORDAC) formally established the Oceania Region as an RSC community in February 2018. Catherine Amey is the Oceania region representative with Melissa Parent as her backup.

The North American RDA Committee (NARDAC) formally established the North America Region as an RSC community in February 2018. Thomas Brenndorfer is the North America region representative with Kate James as his backup.

Gordon Dunsire concluded his term as RSC Chair on December 31, 2018. He is succeeded as Chair by Kathy Glennan in a four-year term that will end in December 2022. Dunsire will take on the role of RDA Technical Team Liaison Officer beginning January 1, 2019 in a two-year term.

Kathy Glennan was a member of the committee in a co-opted (unfilled) position from regions that have not yet implemented RDA until she took on the position of Chair in January 2019.

Ebe Kartus has been extended to a second two-year term as Wider Community Engagement Officer. Her work in this role will now conclude at the end of December 2021.

William Leonard was a member of the committee in a co-opted (unfilled) position from regions that have not yet implemented RDA until his resignation at the end of December 2018.

Daniel Paradis has been extended to a second two-year term as RDA Translations Team Liaison Officer. His work in this role will now conclude at the end of December 2021.

David Reser was a member of the committee in a co-opted (unfilled) position from regions that have not yet implemented RDA until his resignation in July 2018.



The RSC and colleagues at the October 2018 RSC meeting, left to right: Thomas Brenndorfer, Kathy Glennan, Gordon Dunsire, Linda Barnhart, Daniel Paradis, Renate Behrens, Kate James, Melissa Parent, Ebe Kartus, James Hennelly, Chris Oliver, Ahava Cohen, William Leonard

RSC Groups

RSC Working Groups were largely dormant in 2018 due to the RSC focus on the 3R project. Membership in the following task-and-finish groups did not change and can be found on the [RSC website](#) or in the [2017 annual report](#). These groups will be thanked and released in 2019; some may be re-constituted then.

- RSC Aggregates Working Group
- RSC Capitalization Instructions Working Group
- RSC Fictitious Entities Working Group
- RSC Music Working Group
- RSC Places Working Group
- RSC Rare Materials Working Group
- RSC RDA/ONIX Framework Working Group
- RSC Relationship Designators Working Group

The RSC Technical Working Group (Gordon Dunsire, Chair) and the RSC Translations Working Group (Daniel Paradis, Chair) are standing working groups that will continue.

Collaboration with Other Groups

The following people are liaisons to these groups:

- Alan Danskin to ONIX
- Gordon Dunsire to the
 - IFLA Bibliographic Conceptual Models Review Group
 - ISSN International Centre
 - IFLA Permanent UNIMARC Committee
 - Library of Congress Network Development and MARC Standards Office
 - IFLA PRESSoo Review Group
- Renate Behrens to the IFLA ISBD Review Group

Protocols exist between the RSC and the groups listed below. New in 2018 is the protocol with the IFLA Permanent UNIMARC Committee. A protocol with the IFLA PRESSoo Review Group is imminent.

- IFLA Bibliographic Conceptual Models Review Group
- IFLA ISBD Review Group
- IFLA Permanent UNIMARC Committee
- ISSN International Centre
- Library of Congress Network Development and MARC Standards Office

The RSC will continue to seek collaboration with similar groups responsible for the development and maintenance of bibliographic and other standards related to RDA.

The RSC Chair represented the RSC on the RDA Board.

The RSC Chair and RSC Secretary were liaisons to the RDA Development Team, managed by ALA Publishing on behalf of the Copyright Holders.

OUTREACH

The following list includes only half-day or full-day RDA events; presentations about RDA Toolkit or content as part of other meetings may be found on the [2018 presentations page](#) of the RSC website.

Date	Title	Meeting	Approximate number of attendees
February 9	RDA Toolkit Redesign Update and Preview	Preconference to American Library Association Midwinter Meeting, Denver, Colorado	80
May 23	Dansk RDA-dag: Implementing RDA in Denmark	EURIG Annual meeting, Ballerup, Denmark	100
June 15	Das neue RDA Toolkit (news from the RSC and the RDA Toolkit)	German Library Congress, Berlin, Germany	300
June 22	A practical Introduction to the RDA Toolkit	Preconference to American Library Association Annual Meeting, New Orleans, Louisiana	100
August 13	Resource Description for the 21 st Century	Seminar at National Library of Australia, Canberra	89
August 16	CatSIG 2nd Professional Development Day	Professional Development Day for LIANZA (Library and Information Association of New Zealand) Cataloguing Special Interest Group at the National Library of New Zealand, Wellington	77 in person, 45 joining by live streaming
August 23	Diversity of Data: RDA in the International Context	RDA Board event held in conjunction with IFLA World Library and Information Congress	100
September 7	RDA Day in the UK	UK Committee on RDA Day of the Cataloguing and Indexing Group conference	100
September 9-10	Library Standards and RDA	Goethe-Institut and UBA (Library Association of Ukraine), Kiev, Ukraine	200
September 14	What's Next for RDA and the 3R Project?	AL Live Online Webcast	Over 750
October 22	Le RDA Toolkit repensé : ce qu'il faut savoir pour s'y préparer = The Redesigned RDA Toolkit: What You Need to Know to Get Ready	Outreach event at Grande Bibliothèque de BANQ, Montréal, Canada, prior to RSC meeting	170
November 14-16	1er Coloquio sobre RDA en América Latina: Retos de la implementación del nuevo	Biblioteca Nacional de México	50

Date	Title	Meeting	Approximate number of attendees
	RDA Toolkit en las bibliotecas de América Latina (First Colloquium on RDA in Latin America: Challenges of Implementing the new RDA Toolkit in Latin American Libraries)		

PROCESS AND COMMUNICATION

Activity on RDA-L, an online forum for discussion of RDA, as of December 1, 2018:

- 3,460 subscribers (3,101 subscribers in December 2017)
- 666 messages posted from January-December 2018 (1,066 for the same period in 2017)

Over 30 countries are represented by RDA-L subscribers. Several other RDA lists are available in national or language-based communities.

The RSC requested user feedback when the beta site was publicly released and created an online form to capture their thoughts. We have received a steady stream of contributions for a total of 141 responses by the end of 2018, plus others via in-person conversations, email, and RDA-L discussion.

Eleven announcements, nine documents, and thirty-four presentations were posted to the RSC website during 2018. An RDA YouTube channel was established.

An update on RSC activities was published in the June 2018 issue of the *IFLA Metadata Newsletter*.

The RSC and the core team used Google Drive throughout the year. That tool enabled the RSC to track progress on various activities.

James Hennelly set up a trial with Basecamp software following the RSC meeting in Montréal in October. After some initial experiments, the group agreed this was a useful tool particularly for asynchronous discussion, and Basecamp became an ongoing part of regular work processes.

There is a general RDA Twitter handle @rdatoolkit, and for Europe: @EURIG_RDA.

The RSC held a discussion during its meeting in Montréal to come to agreement on new ways of working, including internal and external communication processes as well as a new and more nimble way of changing RDA content. Like many international groups, RSC has had difficulty with

finding convenient times for all for conference calls and will be moving to some asynchronous work via Basecamp. The group will move toward quarterly rather than annual updates to RDA content.

[Reports for 2018](#) from RSC members, liaisons, and working group chairs (31 pp.) are published on the RSC website.