

To: RDA Steering Committee
From: Kathy Glennan, RSC Chair
Subject: Policies and Procedures for Updating RDA Content

This document sets out policies and procedural information related to changing and/or developing RDA content.

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1 Definition of RDA

RDA: Resource Description and Access refers to the international standard which is a package of data elements, guidelines, and instructions for creating library and cultural heritage resource metadata that are well-formed according to international models for user-focused linked data applications.

2 RDA Development

The RDA Steering Committee (RSC) is responsible for the content of the RDA standard. Revisions, consolidations, additions, and other changes may be made to RDA only with RSC approval. For information about RSC voting procedures, see [RSC/Operations/1](#), section 4.

The official content of RDA includes:

- RDA Reference (all RDA elements, their definitions and any related scope notes, and all value vocabulary terms and definitions)
- The English language text of RDA (including all Guidance and Entity chapters)

- The following documents available on the Toolkit's Resources tab:
 - Abbreviations and symbols
 - Additional instructions on names of persons
 - Capitalization
 - Initial articles
 - Terms of rank
- The linked data representation in RDF and associated documentation available from the RDA Registry.

The working language of the RSC is English, and all changes to RDA are developed first in English before being applied to other languages. For information about new translations, see [RSC/Operations/7](#).

Examples are not an official part of RDA and are amended or adjusted by each translation team as appropriate. The RDA Examples Editor has primary responsibility for providing consistent, accurate, and relevant examples in the English language text of RDA and consults with translators on their example choices.

3 Steps in the Change Process

There are three major parts of the RDA change process:

- Proposal/discussion
- RSC decision
- Implementation

4 Proposing Changes to RDA

The RSC considers three different types of recommendations: proposals, discussion papers, and fast track changes. These recommendations must be in harmony with the [Objectives and principles governing RDA](#), as described in the RDA Toolkit guidance chapter on this topic. The RSC will reject submissions which do not meet these conditions and will notify the proposing body or individual with an explanation.

Such suggested changes may originate from:

- RSC members
- RDA regional representative bodies, via their regional representative
- RDA users
 - Via their regional representative body, and if approved, by their regional representative

- Via the Wider Community Engagement Officer, if they are not represented by a regional representative body
- RSC task and finish working groups, via the RSC Chair

The relevant RSC member provides advice on how to frame the suggested changes and vets them for completeness and conformance to RSC guidelines and determines if the suggested changes warrant submission to the RSC.

All RSC change recommendations and the related responses must be submitted in English.

5 Proposals and Discussion Papers

Proposals are formal recommendations to change, enhance, or delete RDA content.

Discussion papers raise topics for RSC consideration before formal proposals are prepared, to suggest a need for investigation of issues related to RDA development, to identify issues related to other rule-making bodies, etc.

For clarity and ease of reference, the RSC has established Guidelines for Proposals, Discussion Papers, and Responses to Them ([RSC/Operations/5](#)) for all such documents submitted to the RSC.

In addition to suggested changes that originate with RDA users, the RSC may request proposals or discussion papers (hereafter “proposed changes”) regarding specific instructions or issues from RDA regional representative bodies, RSC members, or RSC working groups.

Consultation

Consultation with the RDA regional representative bodies is required¹ before the RSC discusses proposed changes.

All proposed changes, as well as formal written responses to them, will be made available publicly for review and discussion of their substance.

- RSC regional representatives will consult with their regional representative bodies to formulate responses to proposed changes originating from outside their regions.

¹ Regional representative bodies are responsible for developing their own approaches for consulting with the groups/individuals they represent.

- Responses should state explicitly whether the proposed changes are accepted or not accepted. Responses should include an explicit response to each recommendation in the proposed change document.
- Responses, revisions, and follow-ups should refer to the original document through the document numbering, and reflect the subsequent response, revision, or follow-up (e.g., RSC/Chair/2020/2/EURIG response; RSC/EURIG/2019/1/rev; RSC/TechnicalWG/2021/3/EURIG follow-up). The beginning of each revised proposed change document or response includes a summary of what was revised.
- Formal responses to proposed changes originating from an RSC working group will be shared directly with that group.
- RDA users not represented by a regional representative body may submit formal responses to proposed changes directly to the RSC Chair.

All RSC members will review the proposed changes and the responses, preparing to discuss them at an RSC meeting.

- RSC members may consult with each other about the proposed changes in advance of the scheduled RSC discussion. This consultation may take place via email or through use of other collaborative workspaces.
- To assist with tracking responses, a log will be maintained for the RSC to indicate briefly the agreement, disagreement, or general comments for discussion.

Approval process

During an online or in-person meeting, or through the use of a collaborative workspace, the RSC will discuss the proposed changes, the responses from the regions, the comments from RSC members, and comments from other RDA users on each recommendation.

- The proposing RSC member may withdraw a proposed change at any time prior to its approval (e.g., after responses are received, during an RSC meeting).
- The RSC voting members² will determine which of the following actions to take in relation to a *proposal*:
 - Accept
 - Revise
 - Refer to a group or individual for more work
 - Reject

² See [RSC/Operations/1](#), section 4.

- The RSC voting members will determine which of the following actions to take in relation to a *discussion paper*:
 - Refer back to the group or individual for further development or investigation; this may include developing a formal proposal based on the RSC discussion
 - Defer to a later date
 - Reject
- Decisions, and the justification for those decisions (when not already clear in the proposal or responses), will be recorded in an official RSC document (the RSC minutes or a separate follow-up document), and the proposing body or individual will be notified of the outcome.
- The RSC Secretary will record the content of the approved revision in an official document. The RSC, and the proposing RSC working group if applicable, will review this document before it is posted on the RSC website and the changes made in the RDA content.

6 Fast Track

Fast track change recommendations make suggestions for improving consistency in wording, additions to vocabularies, and other changes without wider impact. They should be capable of inclusion in RDA without negative impact on its users.

Fast track change recommendations may originate from RDA regional representative bodies, RSC members, RSC working groups, or from other sources, such as RDA Toolkit support and agencies or individuals not represented by an RSC regional representative body. They are submitted to the RSC for consideration by the relevant RSC member (see [section 4](#)).

Consultation

The proposing RSC member initiates the discussion of fast track change recommendations, using a collaborative workspace. For fast track proposals from an RSC working group, the Chair of the group makes its proposal to the RSC Chair, who then initiates discussion of the issue among RSC members. Fast track proposals from other individuals and groups are made to the RSC Secretary or the RSC Chair.

- Regional consultation is at the discretion of the RSC regional representative; it is not required for fast track change recommendations.

- Fast track change recommendations are not made available publicly, nor do they require the creation of formal responses.

Approval process

- All RSC members will review fast track change recommendations, posting their responses to the relevant collaborative workspace page, clearly stating if they agree, disagree, or have additional comments for discussion.
- The RSC voting members will determine which of the following actions to take in relation to fast track change recommendation:
 - Accept
 - Revise
 - Refer to the formal proposal process for a fuller review
 - Reject
- The RSC Secretary will track the discussion, notify the RSC of any additional actions required, record the final decisions, and summarize any significant issues raised during the discussion. The final decisions will be recorded in an official RSC document.

7 Schedule for RDA Changes

The RSC works to an agreed schedule for changing the content of RDA, which will take into account the following dependencies and responsibilities:

- Translations (ALA Publishing)
- RDF linked data representation of RDA Reference in the RDA Registry (RDA Development Team responsibility for technical content)
- Derivative products other than translations, e.g., *RDA Essentials*; special extracts for particular categories of resource, etc. (ALA Publishing with RSC responsibility for accuracy of derived content, review, and proofreading)
- RDA policy statements, user-supplied documents, and application profiles (ALA Publishing)
- Mappings to other standards, e.g., MARC 21, Dublin Core (RSC)
- Complete examples (RSC and RDA Examples Editor)

The content of each revision to RDA Toolkit will be agreed by RSC in consultation with the Copyright Holders Committee and will not be published before the RSC Secretary and one or more RSC members or designated agents proofread the changes.

Changes resulting from approved proposals will be implemented in the next appropriate Toolkit update or release.

8 Reporting Out Changes to RDA

The RSC publishes information on the substantive changes made to RDA content. Final versions of the agreed-upon changes are documented with each proposal on the RSC website, and the Toolkit revision history provides information about what has changed.

Updates to RDA Reference and the RDA Registry are published on the GitHub open access web service using semantic version numbering. All changes can be detected automatically using the built-in version control system.

The RSC will ensure that translators and policy statement creators have prompt notifications of pending changes, along with the planned publication date in the Toolkit.

9 Other Changes to RDA Content

Typographical errors and other minor corrections are made upon notification or discovery and are published in the next RDA Toolkit update or release. These are not tracked as part of the revision history.

- English version of RDA: Any RDA user may report such corrections directly to the RSC Secretary.
- Other language versions of RDA: Any RDA user may report such corrections to the Translations Team Liaison Officer, who will forward them to the appropriate translation team.

Changes to examples may be included in any RDA Toolkit update or release without RSC approval. These are not tracked as part of the revision history.

- English version of RDA: Changes are managed under the authority of the RDA Examples Editor.
- Other language versions of RDA: Changes are managed by the respective translation team.

APPENDIX

Time Frame for Considering Change Proposals

Proposals and Discussion Papers

To allow sufficient time for the RDA regional representative bodies and RSC members to consider and comment on proposed changes:

- Proposals and discussion papers must be submitted to the RSC no less than two months prior to the scheduled RSC discussion.
- Formal responses are due no less than two weeks prior to the scheduled RSC discussion.
- If the proposing group or individual decides to revise the proposed changes after reviewing the formal responses, the discussion of the revised document will be postponed to the next scheduled RSC meeting.
- If there has been inadequate time for consideration of a document, the RSC Chair reserves the right to defer the document to a subsequent RSC meeting.

Fast Track

Fast track change recommendations may be submitted at any time through the collaborative workspace.

The RSC Chair or RSC Secretary sets the RSC response deadline.