

To: RDA Steering Committee

From: Gordon Dunsire, RSC Chair

Subject: Outcomes of the October 2018 RSC Meeting

The fourth meeting of the RDA Steering Committee (RSC) was held on October 22-26, 2018 at the McGill Humanities and Social Sciences Library in Montréal, Québec, Canada.

The meeting was broadly focused on the 3R Project (**RDA Toolkit Restructure and Redesign Project**) and on RSC communication and working methods in the post-3R environment. Participants included:

Linda Barnhart, *RSC Secretary*
Renate Behrens, *Europe representative*
Thomas Brenndorfer, *North America representative*
Ahava Cohen, *Europe representative backup*
Gordon Dunsire, *RSC Chair*
Kathy Glennan, *RSC Chair-Elect, co-opted member*
James Hennelly, *ALA Digital Publishing*
Kate James, *RDA Examples Editor*
Ebe Kartus, *Wider Community Engagement Officer*
William Leonard, *co-opted member*
Chris Oliver, *Vice-Chair, RDA Board*
Daniel Paradis, *RDA Translations Team Liaison Officer*
Melissa Parent, *Oceania representative backup*

Melissa Parent attended the meeting for Catherine Amey, the Oceania representative to the RSC. Nine observers from Canada and the United States attended public sessions of the meeting.

The RSC thanks the Collection Services staff of the McGill Library, particularly Joseph Hafner and Robin Desmeules, for their generous and thoughtful hospitality throughout the week. The RSC is also grateful to Daniel Paradis and staff of the Bibliothèque et Archives nationales du Québec (BAnQ) for their excellent planning and handling of the Monday public event.



Photo: Michel Legendre

The RSC and colleagues, 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

Public Event

“The redesigned RDA Toolkit: what you need to know to get ready = Le RDA Toolkit repensé : ce qu’il faut savoir pour s’y préparer” seminar was held on Monday, October 22, 2018 in the Auditorium of the Grande Bibliothèque of the BAnQ. Approximately 170 people attended, primarily from Québec but a few from other provinces and the United States. The audience was warmly welcomed by Jean-Louis Roy, CEO of BAnQ and the event was hosted by Daniel Paradis. The half-day RSC outreach event was conducted in French and English with simultaneous interpretation. Presentations are posted on the [RSC website](#). Topics included an overview of the first nine months of the North American RDA Committee (NARDAC) given by Dominique Bourassa and Nathalie Mainville; an overview of the 3R Project by Gordon Dunsire; a demonstration of the beta site of the RDA Toolkit by Daniel Paradis; details about recording methods, transcription, and manifestation statements by Kathy Glennan, and a description of the evolving work on aggregates and diachronic works by Gordon Dunsire.

Stabilization of the English Text

The RSC developed a broad plan for the stabilization of the English text of RDA. This means that there will be a complete final draft of the English text from which others will be able to use as the basis for their work. This does not preclude the addition of new instructions such as options required by new RDA

communities. There will still be the possibility of minor editorial changes to RDA text, such as correcting typos, inconsistencies in wording, etc.

There will be three stages in the stabilization process. The first stage will finalize the RDA value vocabularies and element sets in the RDA Registry. The second stage will finalize the instruction wording in the RDA entity and element chapters. The third stage will finalize the text of the guidance and resource chapters.

The goal for completion of all three stages is April 2019, after which the English language text will be available for translation, policy statement preparation and other types of supplemental work. The stabilized English text will become the “baseline” for future release notes about additions and significant changes to RDA.

[RSC/Chair/21](#) provides detail about the timetable and process.

Cataloguers are reminded that RDA text in the [original Toolkit](#) remains the official version of RDA until it is officially replaced by the new site.

The RSC has been [accepting feedback](#) from the cataloguing community since the beta Toolkit was released in June 2018 and encourages feedback on RDA content from the greater community so that all comments may be considered before the English text is declared stable.

LRM Update

Pat Riva (IFLA Bibliographic Conceptual Models Review Group, LRMoo Working Group) gave a presentation on the impact of the continuing development of the Library Reference Model (LRM). She reviewed the ongoing work to develop LRMoo, the object-oriented version of LRM, in harmonization with the CIDOC Conceptual Reference Model (CRM) maintained by the museum community. This initiative has been in development for 18 months. The RSC noted that LRMoo will not cause any significant changes to RDA implementation of the LRM. Gordon Dunsire is the RSC liaison to this group and will continue to monitor their activities. The RSC thanked Pat for her presentation and contributions to the discussion.

RDA Content Discussion

Major topics related to RDA content included discussions and decisions on:

Guidance chapters

- **Aggregates and diachronic works.** There will be further development of guidance and refinement of terminology for these concepts, as well as the review and adjustment of relevant instructions in the entity chapters.
- **Application profiles.** The effective use of RDA will require an application profile to communicate specific community choices among options. An application profile provides a general framework for defining what RDA elements a community uses. RDA Toolkit supports several methods for creating application profiles, including (1) notes that link to an element or instruction; (2) an internal Toolkit document that is locally shared; (3) an external Toolkit document that links into

Toolkit if needed; and (4) an application profile integrated with policy statements. A cataloging input form could also be considered a corollary of an application profile. The Europe region, through EURIG, will do a scoping study on these methods. The RSC may experiment with developing a high-level RDA application profile based on the idea of “core” elements, but “core” and “core-if” designations will not be provided as part of the RDA instructions.

- **Comprehensive/analytical/hierarchical description.** These concepts have been replaced by a new framework: minimal description, effective description, and coherent description. More information is available in the beta Toolkit in the guidance chapter on Resource description.
- **Guidance chapters in general.** Fuller and more guidance is needed, so text will be expanded and clarified.
- **Non-human personages.** The addition of a high-level element to each RDA entity is under consideration as a solution to the narrowed definition of Person.
- **Sources of information.** The RSC reaffirmed its decision from the 2017 Madrid meeting to provide general instructions on sources of information in RDA rather than RDA stipulating an order of preference. Application profiles for specific communities can provide detailed guidance about sources of information where desired. The text on sources of information is available in the beta Toolkit in the guidance chapter on Data provenance.
- **User tasks.** The RSC agreed to remove the User tasks section from Element Reference within each element because almost all elements support all user tasks, depending on the application. The RSC agreed to add a guidance chapter instead.

Entity chapters

- **Access point elements.** At its 2017 meeting in Madrid, the RSC agreed that access points should become elements in RDA. In practice, this has meant disentangling the often lengthy and complex instructions for name/preferred name/variant name (or title) elements from the access point/authorized access point/variant access point instructions. Thomas Brenndorfer presented an analysis of the challenges of creating these new elements, including re-arranged draft text and recommendations for further discussion. The RSC thanked Thomas for his thoughtful work on this difficult task and will move ahead with evaluating the proposed language and structure.
- **Element labels.** Because the RSC agreed in an earlier meeting that element labels should avoid including punctuation, those that include the term “etc.” will be changed to eliminate this term. The Committee discussed eliminating the term “other” in element labels and will do some analysis to see how this can be achieved. The term “designation” in element labels may also need to be clarified.
- **New elements.** The RSC will explore a possible new element for Expression “version.” The RSC will investigate the impact of adding element sub-types for Agent relationship elements to accommodate finer granularity for Corporate Body, Family, and Person. This work will include a potential solution for languages that do not have gender-neutral terms to describe persons. A few new elements may be necessary to accommodate the description of diachronic works and aggregates.
- **Relationship designators and relationship elements.** As part of a discussion of known pending requests from communities for new relationship designators, the RSC clarified that in the new Toolkit, relationship designator as a concept has been replaced by relationship element. The relationship designators from appendices I, J, K, and M are now elements that provide a defined relationship between two entities. These relationship elements can be seen in the Relationship Matrix in the Resources tab of the beta site in a hierarchical view, and in the element list in each

entity chapter in an alphabetical view. The RSC discussed granularity of relationship elements in RDA and expressed concern about the potential for infinite sub-typing. There may be a solution in cataloguers creating a separate description for important but granular resources.

- **Soft deprecation of elements.** Some elements have been retained in the beta Toolkit as a transition device for legacy data. Examples include the “details of” and “parallel” elements. Instructions in those elements include the text “The following option is preferred” which points to the preferred element for recording that data. These redundant elements are considered “soft deprecated,” which means that each is a candidate for future removal from RDA. The RSC agreed to prepare and publish a list of soft deprecated elements as formal community notice for planning and training purposes. The elements will be removed only after a re-evaluation by the RSC following the stabilization of the English text.

Beta Toolkit Design and Functions

The RSC approved the overall design and layout of the beta Toolkit, including the new approach to conditional and optional instructions.

The RSC discussed proposals for further development of functionality during the remainder of the 3R Project. These include improvements to the Relationship Matrix and the addition of a long-planned visual browser for RDA entities and elements. The RSC also approved the development of a method for brief citation of Toolkit components in offline training and teaching materials.

The Committee approved some enhancements to the RDA to MARC 21 mappings, and the development of mappings to other related schemas and ontologies.

RSC Communication and Work Processes

The RSC agreed that the time to implement major changes to the committee’s communication and work processes is following completion of the 3R Project. The yearly cycle of updates to RDA is not fast enough nor responsive enough. The changes to the Toolkit production infrastructure create opportunities to do things differently. The new governance structure with regional representation provides a new context for development of RDA. The RSC expects to act like an executive committee overseeing development activities carried out by constituencies and working groups. The RSC has learned from its experiments over the last few years (including Fast Track Plus, changed roles for Working Group chairs, and a core team for the 3R Project) and is ready to define a “new normal.”

Formal policy documents will be updated, approved by the RDA Board, and published in due course to articulate the details. The coming year will still be considered experimental; new work methods and processes will properly begin in 2020. In rough outline, the RSC agreed upon the following general direction:

- A quarterly update calendar will be developed for RDA development that matches a quarterly release schedule for RDA Toolkit. Releases will have updated RDA content and occasional design/function enhancements as needed.
- The RSC confirmed the current workflow of publishing updates to the English text of RDA regardless of the status of associated policy statements and translations. A Toolkit release may

contain updates to the English RDA text, translations of RDA, and policy statements. A special release for a translation or a set of policy statements is possible.

- The RSC confirmed that it will continue to permit minor editorial changes to RDA, including examples, without RSC consultation and will not provide details of those minor changes in release notes.
- An annual face-to-face meeting that rotates internationally through the active RDA regions, planned a year or more in advance, is crucial to meeting the mission and purpose of the RSC.
- The RSC will implement a collaborative online tool to enable asynchronous virtual meetings between the annual meetings. A collaborative online tool will support and track continuous discussion and will permit faster decisions on changes to RDA content. Larger issues that cannot be resolved asynchronously may be addressed on monthly calls, and the most difficult issues would escalate to the annual face-to-face meeting. This infrastructure could be extended to regions and Working Groups to aid in their work.
- Regions will take on projects as directed work, as well as carry forward community ideas and concerns and respond to ideas and concerns from other regions.
- The RSC re-confirmed the independence of the regional groups in how they organize themselves and manage their internal processes.
- The RSC expects to form new Working Groups after the English text stabilization. Working groups may focus on a specific type of resource or a part of RDA that the RSC determines needs further development. Also under consideration are working groups for policy statement writers, and a group for archives that has been requested by the RDA Board. New Working Groups will be task-and-finish groups with an expected timespan of two years and all will have international representation. The two standing Working Groups will continue: the Translations Working Group and the Technical Working Group.
- The RSC expects to develop a new process for submitting changes to RDA through the regions, Working Groups, and Wider Community Engagement Officer. New terminology will be used to signal a change from the existing process. One possible model is a cover document of basic information (abstract, rationale, etc.) to precede an element template page. Similar formats could be used for new glossary and vocabulary terms. A brief editorial or style guide may be needed.
- Subsequent steps in the review process need further development, but the RSC confirmed its commitment to posting documents for public review and a formal process for communicating with the originators to convey outcomes.
- A new document numbering system that re-starts every year will be established.
- The RSC re-confirmed its commitment to transparency, including the public sharing of agendas and minutes. The Committee needs to formulate clearer policies on archiving its work, including access to its archives.

Collaboration with other groups

As RSC Chair, Gordon Dunsire is the liaison to the RDA Board. Gordon Dunsire and Linda Barnhart are liaisons to the RDA Development Team, a group managed by ALA Publishing on behalf of the Copyright Holders.

Renate Behrens is the RSC liaison to the IFLA ISBD Review Group. Alan Danskin is the RSC liaison to ONIX. Gordon Dunsire is the RSC liaison to the IFLA Bibliographic Conceptual Models Review Group, the IFLA Permanent UNIMARC Committee, the IFLA PRESSoo Review Group, the ISSN International Centre, and the Library of Congress Network Development and MARC Standards Office. The RSC has protocols with these organizations and will continue to seek collaboration with similar groups responsible for the development and maintenance of bibliographic and other standards related to RDA.

Next Steps

The RSC expects to thank and disband the extant Working Groups in due course. Some groups are likely to be reconstituted with new terms of reference.

The term of the current RDA Examples Editor ends December 31, 2019, and a recruitment will soon be launched for her successor so that there will be sufficient overlap for training and continuity.

The RSC recognized and thanked Gordon Dunsire for his vision, leadership, and hard work as RSC Chair. Kathy Glennan will succeed him on January 1, 2019.

The RSC also thanked Dave Reser for his service as a co-opted member and before that as the Library of Congress representative to the RSC.