To: RDA Board
             and
        RDA Steering Committee

From: Gordon Dunsire, Chair, RSC

Subject: Annual report for 2017

This is the Annual Report of the RDA Steering Committee (RSC) to the RDA Board for the calendar year 2017. The Chair of the RSC, Gordon Dunsire, prepared the report with assistance from the RSC and RSC Secretary, Linda Barnhart.

RSC+ (RSC members plus Working Group Chairs) met twice in 2017. The first meeting was held at ALA Headquarters in Chicago, Illinois, USA from May 17-19. The second meeting was held at the Biblioteca Nacional de España (BNE) in Madrid, Spain from October 24-26.

3R (RDA RESTRUCTURE AND REDESIGN) PROJECT

The 3R Project was the major focus of the RSC core team (RSC Chair, RSC Secretary, RSC Examples Editor, and Director of ALA Digital Publishing) and of RSC+ for the full extent of 2017. To manage the project, the core team scheduled regular weekly phone calls and met in person before and after the two RSC+ meetings and the two ALA meetings.

ALA Publishing changed the planned release date of the new Toolkit from April 11 to June 13, 2018 to accommodate the changes related to the 3R Project. The RSC anticipates that some communities will take a year or more before implementing the new Toolkit. Each community will need to work on creating new policy statements, training documents, etc., and non-English-speaking communities will need to update their translations. To support the transition period, the old (i.e., current) version of the Toolkit will remain available for one year following the completion of the 3R Project.

In terms of Toolkit design and structure, progress has been made in many areas:
- The core team, in consultation with Dakota Systems, developed a "chunking" strategy (a principle for file construction), a directory structure, file naming conventions, and the internal element structure for Toolkit content;
- Through a series of tagging tests, the core team spent time learning DITA and deciding on appropriate markup techniques, experimented with reusable content, and settled on the best practices for example tagging;
- Beyond the tagging tests, the core team provided RDA data to our development partners so that we all moved ahead together. Data was provided to Design for Context, user experience experts, to use in their mockups. Small groups of elements were marked up to gain experience, test reusable content and study various workflows. A larger group of elements based on place and timespan provided real data for GVPi, our digital publishing

provider, for their site development work. These efforts have helped inform the core team in planning the strategy for creating the new Toolkit content;

- Design for Context worked with James Hennelly and the core team in designing a new site and new logos that meet the established goals;
- GVPi advised James Hennelly and the core team on markup, navigation, and other issues related to setting up a new Toolkit site;
- Dakota Systems, our data support specialists, provided custom scripting to allow an efficient transfer of data between the Open Metadata Registry (OMR) and the new Content Management System (CMS); converted the current Toolkit data into DITA markup; set up the new CMS with an oXygen Web Author tool; and provided consistently useful advice on DITA implementation and markup choices;
- Metadata Management Associates, the developers of the OMR, continued to add functionality to support RDA data maintenance; provided advice as a member of the RDA Development Team; and established new OMR elements for accommodating additional RDA data on recording methods, user tasks, and element processing for the CMS.

In terms of RDA content as it is being implemented in the 3R Project:
- Gordon Dunsire provided analysis and vision through briefing papers for both meetings on major topics:
  o Nomen hierarchies
  o Transcription and manifestation statements
  o Entity relationship elements derived from attributes
  o Decisions on structural aspects of elements
  o Impact of the LRM on aggregates and serials in RDA
- Judy Kuhagen made substantive contributions to RDA content through her analysis of the following topics and drafts of suggested language:
  o Basic and normalized transcription rules
  o Manifestation statements
  o Access points (and authorized access points and variant access points) as elements
  o "Note on" and "Details of" elements
  o Pre-cataloguing decisions
  o Changes over time
- At the Chicago meeting, RSC+ agreed[1]:
  o In terms of the general approach, the new design will replace the current "book-like" approach with a more flexible and responsive structure. Guidance and general instructions will be provided through a set of general chapters. Instructions for specific RDA elements will follow, with a chapter for each of the twelve RDA entities (Agent, Collective Agent, Corporate Body, Expression, Family, Item, Manifestation, Nomen, Person, Place, Timespan, and Work). The entities will be treated equally in their structure and presentation.
  o RSC expects a large increase in the number of elements in RDA. Some new elements support new entities from the LRM. Other new elements are being identified through Working Group analysis or other means. The RSC agreed to consider adding

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[1] See the Outcomes document for more detail.

access points as new elements in the context of nomen hierarchies and is studying the implications.
- o The Examples Editor proposed new and better ways of displaying and managing examples, in part because the redesign offers new technical possibilities.
- o The RSC agreed to proceed with the development of sub-types of the new manifestation statement at a "complete statement" level of granularity, for example, title and statement of responsibility. The RSC agreed to develop a set of basic, simple transcription rules, and retain and consolidate current normalization rules as an option.
- o The RSC endorsed the basic model of aggregates and asked the Aggregates Working Group to prepare draft text for a new general chapter to provide definitions, descriptions and principles.
- o The RSC discussed the guidance chapters and prepared a tentative list. Members of the group accepted assignments to prepare initial drafts.
- At the Madrid meeting, RSC+ agreed[2]:
  - o The most substantive RSC discussion was on the impact of the LRM on continuing resources. RSC endorsed a re-conceptualization of the instructions, in parallel with work being done by the ISSN International Centre, leading to a new model, terms, and definitions for diachronic works (works planned to be embodied over time, rather than as a single "act of publication"—which include serials but also any successive or integrating works, whether finite or open-ended).
  - o The RSC accepted the recommendation to use the label "non-human personages" in lieu of "fictitious entities."
  - o The RSC discussed the appendices in RDA and made decisions about keeping, dropping or modifying each.
  - o RSC confirmed their agreement to move forward with several developments that were under consideration from the May 2017 RSC meeting. RDA will introduce access points as elements and will add identifiers as elements for all entities. RSC ratified the four recording methods (formerly called the 4-fold path) as an infrastructure for all elements. The group agreed on a new approach to examples that includes "view in context" and "view as relationship" examples as well as examples for the various recording methods.

The topic of RDA translations was a thread that ran through almost all RSC discussions, particularly in Madrid, where there was a half-day in-person meeting with the eleven available translators. The full instruction set has been translated into eight languages and RDA Reference into eight more, with four in progress. RSC is acutely aware of the time needed to provide accurate and thorough translations. The goal is an ongoing and timely synchronization between the base English text and each translation.

RDA CONTENT

RDA Instructions

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[2] See the Outcomes document for more detail.

There were five releases of RDA Toolkit in 2017: February, April, August, October, and December.

- The **February** release included five categories of editorial changes that paved the way for further changes expected in the 3R Project:
    1) replacement of wording "person, family, or corporate body" and similar phrases with "agent" or "agents";
    2) deletion of articles within element names and replacement of a definite article with an indefinite article preceding element names in instructions;
    3) replacement of the word "resource" with the appropriate RDA entity when the context was clear and extensive revision of instructions was unnecessary,
    4) deletion of the phrase "(in this order)" in instructions for access points; and
    5) replacement of "and/or" with "or" as appropriate.

- The **April** release included the changes from the successful proposals presented at the 2016 meeting in Frankfurt. The process to utilize RDA Reference data was extended to vocabulary lists within RDA instructions in this release. The April release saw the debut of the Catalan translation of RDA which was prepared by the Biblioteca Nacional de Catalunya. The release included revisions and updates to the MARC/RDA bibliographic mappings in English, British Library Policy Statements (BL PS), policy statements from Library and Archives Canada (LAC) and Bibliothèque et Archives nationales du Québec (BAnQ), Library of Congress-Program for Cooperative Cataloging Policy Statements (LC-PCC PS), Music Library Association Best Practices (MLA BP), National Library of Australia Policy Statements (NLA PS), and Finnish policy statements (Suomalaisten kirjastojen linjaukset--SKL). The English language version of Toolkit was frozen after the April release.

- The **August** release updated the German language RDA to bring it in line with the April 2017 update. The release also included revisions and updates to the MARC/RDA bibliographic mappings in English, Kungliga biblioteket Svensk Praxis (KB SP), Library of Congress-Program for Cooperative Cataloging Policy Statements (LC-PCC PS), and National Library of Australia Policy Statements (NLA PS). Policy statements from Committee for Library Standards for the application of RDA in Germany, Austria, and Switzerland, known as Anwendungsrichtlinien (D-A-CH AWRs), were updated in both German and French.

- The **October** release updated the Catalan language RDA to bring it in line with the April 2017 update.

- The **December** release updated the Finnish and French translations of RDA to bring both in line with the April 2017 update. These changes were accompanied by related updates to the Finnish policy statements and to English and French language policy statements from Library and Archives Canada (LAC) and Bibliothèque et Archives nationales du Québec (BAnQ).

The first two releases included, as usual, corrections and minor revisions of instructions and examples; new relationship designators; new and revised definitions; and revisions of wording for editorial consistency.

RDA Reference

RDA Reference data was used to populate the Glossary, vocabulary encoding scheme term lists, and relationship designator appendices in all but the first release of RDA Toolkit during 2017, including translations.

Updates to RDA Reference and other data included in the RDA Vocabularies in 2017 focused on proposals approved by the RSC in 2016, translations, and preparation for the 3R Project.

Version 2.6.1 of the RDA Vocabularies was released in January 2017. This version synchronized the RDA element set vocabularies with the February 2017 release of RDA Toolkit. The release included an update to the alignments and semantic maps between RDA and MARC 21 relator codes and terms.

Version 2.6.2 was released in February 2017 and consisted of fixes to typos and other minor errors.

Version 2.7.0 was released in March 2017. This version synchronized the vocabularies with the April 2017 release of RDA Toolkit. The release added new elements, updated some elements, updated the vocabulary encoding scheme for book/bibliographic format, and added a new vocabulary encoding scheme for Regional encoding of video carriers, following proposals accepted by the RSC in November 2016. The release included a partial translation of the RDA Vocabularies into Greek.

Version 2.7.1 was released in June 2017. This version included new and amended partial translations into Catalan, Danish, Dutch, Finnish, French, Greek, German, and Vietnamese.

Version 2.7.2 was released in August 2017. The release completed the translations of RDA Vocabularies into Catalan, Danish, Finnish, and German, continued the translations into French, Greek and Vietnamese, and added a partial translation into Norwegian.

Version 2.7.3 was released in October 2017. This release completed the translations into French, Greek and Norwegian.

The number and types of elements published by the end of 2017 are:

366 Agent canonical properties
289 Expression canonical properties
71 Item canonical properties
253 Manifestation canonical properties
14 Nomen canonical properties
17 Place canonical properties
14 RDA Entity canonical properties
14 Timespan canonical properties
322 Work canonical properties
864 Unconstrained properties

6 Meta-element properties
33 RDA/ONIX Framework elements
13 Classes

There were 39 value vocabularies published by the end of 2017.

Documentation on recommended abbreviations for RDA Vocabulary namespaces, for use in compact URIs, was added to the Registry.

6 posts were made to the RDA Registry blog. 15 issues raised in the GitHub RDA-Vocabularies project were closed; 36 remain open.

An application for an Institute of Museum and Library Services (IMLS) grant to support an RDA editor was unsuccessful. ALA Digital Reference and the RDA Development Team will continue to seek funding for this project.

PEOPLE

Membership

Linda Barnhart transitioned from Secretary-Elect to RSC Secretary on April 14, 2017, and at the same time Judy Kuhagen took on the role of 3R Project Consultant. She retired from that role on August 29, 2017.

The European RDA Interest Group (EURIG) formally established the Europe Region as an RSC community in May 2017; it includes 40 members from 27 countries. Renate Behrens is the Europe region representative with Ahava Cohen as her backup.

Effective Jan. 1, 2018:
- Kathy Glennan will serve one year as the RSC Chair Elect; her 4-year term as chair will commence on Jan. 1, 2019.
- Ebe Kartus (currently the Australian Committee on Cataloguing (ACOC) representative) will assume the new position of Wider Community Engagement Officer.
- The Oceania RDA Committee (ORDAC) and the North American RDA Committee (NARDAC) become a formal part of the RSC governance structure, with single representatives from these regions. The ORDAC and NARDAC reps will replace those from ACOC, ALA, CCC, and LC. The current reps who do not assume these new positions may serve as co-opted members of the RSC during 2018.

In early 2018, NARDAC and ORDAC will identify their new RSC representatives.

RSC+ in October 2017 at the Biblioteca Nacional de España: *Back row (left to right): William Leonard, Francis Lapka, Kate James, Pat Riva, Ebe Kartus, Daniel Paradis; Third row: James Hennelly, Renate Behrens, David Reser, Ahava Cohen, Kathy Glennan, Gordon Dunsire; Second row: Damian Iseminger, Amanda Sprochi, Deborah Fritz; Front row: Linda Barnhart, Alan Danskin*

RSC Groups

The **RSC Aggregates Working Group** membership was:

- Greta de Groat (Stanford University, USA)
- Gordon Dunsire (RSC)
- **Deborah Fritz** (TMQ, USA) (Chair)
- Damian Iseminger (Library of Congress, USA)
- Ed Jones (National University, USA)
- Françoise Leresche (Bibliothèque nationale de France)
- Clément Oury (ISSN International Centre/CIEPS)
- Melissa Parent (State Library Victoria, Australia)
- Jenny Stephens (National Library of Australia)
- Chris (Christine) Todd (Wellington City Libraries, New Zealand)

The **RSC Capitalization Instructions Working Group** membership was:

- Sue Andrews (University of British Columbia, Canada)
- Carlo Bianchini (University of Pavia, Italy)
- Anders Cato (Danish Agency for Culture and Palaces)
- Ageo García (Tulane University, USA)
- Mauro Guerrini (University of Florence, Italy)
- Anita Krawalski (Deutsche Nationalbibliothek, Germany)
- **Pat Riva** (Concordia University, Montreal, Canada) (Chair)
- Marja-Liisa Seppälä (National Library of Finland)
- Marja Smolenaars (National Library of the Netherlands)
- Larisa Walsh (University of Chicago, USA)

The **RSC Fictitious Entities Working Group** membership was:

- Gordon Dunsire (RSC)
- Mary Anne Dyer (Virginia Commonwealth University, USA)
- Sandra Macke (Multnomah County Library, Oregon, USA)
- Robert Maxwell (Brigham Young University, USA)
- Richard Moore (British Library, UK)
- Gayle Porter (Chicago State University, USA)
- Mark Scharff (Washington University in St. Louis, USA)
- **Amanda Sprochi** (University of Missouri, USA) (Chair)
- Stephanie Zutter (National Library of Luxembourg)

The **RSC Music Working Group** membership was:

- James Alberts (Library of Congress, USA)
- Anders Cato (Danish Agency for Culture and Palaces)
- Jean Harden (University of North Texas, USA)
- Mary Huismann (St. Olaf College, USA)
- **Damian Iseminger** (Library of Congress, USA) (Chair)
- Kevin Kishimoto (Stanford University, USA)
- Morris Levy (Northwestern University, USA)
- Daniel Paradis (Bibliothèque et Archives nationales du Québec, Canada)
- Christoph Steiger (Universität für Musik und darstellende Kunst Wien, Universitätsbibliothek)

The **RSC Places Working Group** membership was:

- Christian Aliverti (Swiss National Library)
- **Gordon Dunsire** (RSC) (Chair)
- John Hostage (Harvard Law School Library, USA)

- Kate James (Library of Congress, USA)
- Kevin M. Randall (Northwestern University, USA)
- Esther Scheven (Deutsche Nationalbibliothek)

The **RSC Rare Materials Working Group** membership was:

- Michael Beer (Bayerische Staatsbibliothek, Germany)
- Adelaida Caro Martín (Biblioteca Nacional de España)
- Jane Gillis (Beinecke Library, Yale University, USA)
- Matthew Haugen (Columbia University, USA)
- **Francis Lapka** (Yale Center for British Art, USA) (Chair)
- Deborah J. Leslie (Folger Shakespeare Library, USA)
- Peter Sjökvist (Uppsala University, Sweden)
- Aislinn Sotelo (University of California, San Diego, USA)
- Sanne van Splunter (Koninklijke Bibliotheek, Netherlands)
- Helen Vincent (National Library of Scotland)

The **RSC RDA/ONIX Framework Working Group** membership was:

- John Attig (Pennsylvania State University, USA)
- Graham Bell (Editeur)
- **Alan Danskin** (British Library, UK) (Chair)
- Gordon Dunsire (RSC)
- Annie Glerum (Florida State University, USA)
- Ebe Kartus (RSC)
- Françoise Leresche (Bibliothèque nationale de France)
- George Prager (New York University, Law School Library, USA)
- Pat Riva (Concordia University, Montreal, Canada)
- Mirna Willer (University of Zadar, Croatia)

The **RSC Relationship Designators Working Group** membership was:

- **Gordon Dunsire** (RSC) (Chair)
- Ryan Hildebrand (University of Oregon, USA)
- Maira Kreislere (National Library of Latvia)
- Robert Maxwell (Brigham Young University, USA)
- Kelley McGrath (University of Oregon, USA)
- Silvia Luisa Pisano (University of Buenos Aires, Argentina)
- Kevin Randall (Northwestern University, USA)
- Thomas Whittaker (Indiana University, USA)

The **RSC Technical Working Group** membership was:

- John Attig (Pennsylvania State University, USA)

- **Gordon Dunsire** (RSC) (Chair)
- Deborah Fritz (TMQ, USA)
- Sarah Hartmann (Deutsche Nationalbibliothek)
- Diane Hillmann (MMA, USA)
- Ricardo Santos Muñoz (Biblioteca Nacional de España)
- Marja-Liisa Seppälä (National Library of Finland)

The **RSC Translations Working Group** membership was:

- Cinzia Bufalino (for German translation)
- Anders Cato (for partial translations)
- Ida Conesa Sanz (for Catalan translation)
- Mauro Guerrini (for Italian translation)
- James Hennelly (Director, ALA Digital Reference)
- **Daniel Paradis** (for French translation) (Chair)
- Octavio Rojas (for Spanish translation)
- Marja-Liisa Seppälä (for Finnish translation)

- Gordon Dunsire (RSC Chair, ex officio)
- Kate James (RDA Examples Editor, ex officio)
- Linda Barnhart (RSC Secretary, ex officio)

The RSC hopes to establish a working group on archives in 2018.

Collaboration with Other Groups

The following people are liaisons to these groups:

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

Protocols exist between the RSC and the groups listed below. Protocols are being established with the IFLA PRESSoo Review Group and the IFLA Permanent UNIMARC Committee.

- IFLA FRBR Review Group
- IFLA ISBD Review Group
- 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 was a liaison to the RDA Board.

The RSC Chair, RSC Secretary, and RSC Secretary-Elect were liaisons to the RDA Development Team, managed by ALA Publishing on behalf of the Co-Publishers.

OUTREACH

The RSC held a public event in Chicago, Illinois, attended by 29 people on May 16, titled "Reconstructing RDA in the LRM: Aggregations, Appellations, and Authorities."

Taking advantage of an open time-slot at the ALA Annual meeting in Chicago, the RSC held a "pop up" meeting on June 26, at which specialist communities were given the opportunity to express their "wish lists" for future RDA development. Representatives from the cartographic, audio-visual, music, archival, and rare materials communities prepared formal remarks, but audience members from other communities (serials, art, government documents, and dance) also shared ideas.

The RSC co-hosted a meeting (with NUKAT (the union catalogue of Polish academic and research libraries), the ISBD Review Group, and EURIG/RDA Europe region) following the IFLA WLIC on August 25 at the Wrocław University Library titled "Impact of the IFLA LRM on ISBD, RDA, and Other Bibliographic Standards." This event led to a re-conceptualization of the model, terms, and definitions for serial/diachronic works in conjunction with the ISSN International Centre. It was attended by 40 people.

The RSC held a very successful public event in Madrid, Spain on Monday, October 23, 2017, titled "Preparing for the new RDA Toolkit." The event was attended by approximately 90 people and was streamed live to 290 people.

The BNE held a very well-attended and live-streamed open seminar on Friday, October 27 called "Development of RDA and implementation use cases in Europe." In addition to presentations on the new Toolkit design by James Hennelly and on RDA data and context by Gordon Dunsire, there were presentations on RDA implementation in the German-speaking countries, in Iceland, in Catalonia, and at the Biblioteca Nacional de España.

PROCESS AND COMMUNICATION

Activity on RDA-L, an electronic forum for discussion of RDA, as of December 1, 2017:

- 3,101 subscribers (2,981 subscribers in December 2016)
- 1,066 messages posted from January-November 2017 (1,450 for the same period in 2016)

Over 30 countries are represented by RDA-L subscribers.

The RSC and the core team, assisted by James Hennelly, used Google Drive throughout the year. That tool enabled the RSC to track progress on various activities (e.g., discussing and agreeing to "Fast Track" changes, sharing information on upcoming meetings).

RSC established a 3R Project wiki on the open source PB Works platform, which launched on April 10 with an international tele-training session. The wiki is being used to consolidate comments and efficiently discuss 3R Project matters.

Updates on RSC activities were published in two issues of the *IFLA Metadata Newsletter* in June and December 2017.

The RSC website added several new sections (RDA Regions; Presentations; and Restricted Documents) and provided new and updated content (RDA FAQ and 3R Project FAQ). Twenty announcements were made during the year.

Trados, a software package that helps to manage translations, was implemented by ALA Publishing in March.

There has been ongoing public relations work in the regions by presentations, workshops, publications and social media.

Because of the focus this year on the 3R Project, reports were not requested from Working Group Chairs or liaisons with other organizations.

Appendices:
    -- Report of the RSC Chair
    -- Report of the RSC Secretary
    -- Report of the RDA Examples Editor
    -- Co-publishers report

2017 report of the RSC Chair

This report covers the period November 2016-October 2017.

Outreach and liaison activities

The RSC Chair made presentations on RDA and related topics to the following conferences and meetings:

- 17-18 Nov 2016: The Kiviathon, Kansalliskirjasto (National Library of Finland), Helsinki. Presentation on "RDA, linked data, and update on development".
- 24-25 Apr 2017: LD4P/LD4L-Labs Community Input Meeting, Stanford University, Palo Alto, USA. Lightning presentation on "RDA and the IFLA Library Reference Model (LRM)".
- 8-10 May 2017: EURIG Annual Meeting and Seminar 2017, Fiesole and Florence, Italy. Presentation on "RDA governance and strategy". Presentation on "Aligning RDA with the LRM". Presentation on "RDA and practical linked open data".
- 16 May 2017: "Reconstructing RDA in the LRM: Aggregations, Appellations, and Authorities", Chicago, USA. Presentation on "Appellations, authorities, and access".
- 24-26 Jun 2017: American Library Association conference 2017, Chicago, Ill, USA. Presentation on "Appellations, authorities, and access plus" to CC:DA meeting. Presentation on "Extending RDA progress (briefly)" to the RSC "pop-up" meeting with special materials communities. Presentation on "RDA linked data vocabularies data management and use workflow" to RDA Linked Data Forum.
- 4 Aug 2017: Cataloguing and Indexing Group Scotland seminar, Edinburgh, Scotland. Presentation on "RDA update Edinburgh 2017".
- 25 Aug 2017: Meeting on Impact of the IFLA LRM on ISBD, RDA, and Other Bibliographic Standards, Wroclaw, Poland. Presentation on "LRM-RDA".

Links to presentations are available at http://www.gordondunsire.com/presentations.htm

The RSC Chair attended private meetings to discuss the impact of the 3R Project on cataloguing administration and management:

- 11 Jun 2017: British Library, Boston Spa, England
- 19 Jun 2017: BDS (Bibliographic Data Services), Dumfries, Scotland

The RSC Chair attended meetings of the following IFLA groups during the World Library and Information Congress 2017, Wroclaw, Poland (19-24 Aug 2017):

- FRBR Review Group (outgoing member, continuing as liaison for RSC)
- IFLA Cataloguing Section (member)
- ISBD Linked Data Study Group (member)

- ISBD Review Group (member)
- LIDATEC (member)
- Permanent UNIMARC Committee (consultant)

The RSC Chair participated in online meetings of:

- RDA Board
- RSC Aggregates Working Group

Administration and development activities

The RSC Chair participated in online meetings of:

- 3R Project core team
- 3R Project design team
- 3R Policy statements group
- RDA Development Team
- RDA Translations Working Group

The RSC Chair liaised with ALA Digital Reference and the RDA Development Team in the continuing development of the RDA content management infrastructure.

The RSC Chair liaised with ALA Digital Reference, the RDA Development Team, and the RSC Translations Working Group on developing the infrastructure for maintaining translations of RDA Reference. The RSC Chair acts as the primary contact for translations of RDA Reference in the OMR during the transition to the new structure of the RSC.

The RSC Chair chaired the working groups:

- RSC Places Working Group
- RSC Relationship Designators Working Group
- RSC Technical Working Group

Submitted by: Gordon Dunsire, Chair, RSC
Date: 2 October 2017

2017 report of the RSC Secretary

Judy Kuhagen was RSC Secretary until April 20, 2017, when Secretary-Elect Linda Barnhart took on that role. Judy Kuhagen then became 3R Editor until August 29, 2017. Activities below were done by both unless otherwise noted.

Contributions to the 3R Project:

- Participated in weekly core team calls about process and content
- Prepared agendas for calls (Linda)
- Drafted updates to RSC+ to communicate decisions and activities
- Participated in calls with developers to ask questions and provide feedback
- Prepared draft chunks for review
- Learning DITA and assisting with determining RDA markup best practices (Linda)
- Assisting with devising efficient workflows for instruction approval and markup
- Tracking OMR and instruction fixes needed in new Toolkit
- Assisting with providing sample content for developers
- Prepared analysis and briefing papers on transcription rules, changes over time, manifestation statements, name of person, identifiers, and other topics (Judy)

After the November 2016 meeting in Frankfurt:

- Prepared 15 Sec final drafts of approved proposals
- Posted Sec final documents on RSC website
- Updated the Action Items document
- Sent regular reminders to RSC+ of weekly deadlines
- Prepared public and restricted versions of meeting minutes
- Assisted Chair with preparation of meeting outcomes
- Prepared article for IFLA Metadata Newsletter based on meeting outcomes

To update the RDA content via February, April, and August releases of RDA Toolkit:

- Coordinated the Fast Track log process (Linda)
- Collected corrections from RSC+, translators, and Toolkit users (Linda)
- Received example revisions from the RDA Examples Editor (Linda)
- Identified changes needed for editorial consistency
- Made changes to 33 instructions/examples resulting from approved Fast Track and Fast Track Plus (not including corrections or changes for editorial consistency)
- For the February release, completed five editorial projects to prepare Toolkit for the 3R Project (replaced Person/Family/Corporate Body with Agent; deleted or replaced initial articles within element names, etc.)

- For the April release, prepared the changes from the 15 Sec final versions of approved proposals and prepared Toolkit to utilize RDA Reference data in vocabulary lists
- With RSC volunteers, proofread changes on the stage site and in the PDFs from that site
- Updated the Element Analysis Table after the April release of RDA Toolkit (Judy)
- Provided OMR data to developer for releases

Assisted in planning the 2017 Chicago and Madrid meetings:

- Planned meeting logistics in collaboration with local hosts and RSC+
- Assisted Chair in developing the agenda
- Assisted Chair with preparation of briefing papers and proposals (Judy)
- Assisted in planning the May outreach event (Linda)
- Assisted in planning the October outreach and translation meetings (Linda)

After the May 2017 meeting in Chicago:

- At the outreach meeting, presented on the current status of Toolkit content (Judy)
- Prepared the restricted version of meeting minutes
- Assisted Chair with preparation of meeting outcomes
- Prepared article for IFLA Metadata Newsletter based on meeting outcomes
- Updated both Action Items documents for RSC members and for core team
- Added and maintained an Action Items list on the 3R Project wiki

As a member of the core team:

- Monitored email communications with the Translations Working Group
- Learned the basics of the Trados software sufficient to understand processes and capabilities (Linda)
- Participated in conference calls with the RDA Development Team
- Participated in the selection process for the Translations Team Liaison Officer
- Reviewed drafts of grants proposals for further RIMMF development
- Assisted in planning an RSC-sponsored outreach event at IFLA WLIC
- Provided assistance to ALA staff for national survey requested by RDA Board
- Drafted updates to policy documents
- Assisted Chair with updating Working Group membership and tasks for 2017

To communicate with cataloguing communities:

- Posted documents (proposals, discussion papers, responses to documents, policy documents, etc.) on RSC website
- Drafted and posted announcements on RSC website
- Sent email messages about postings to specific lists

- Assisted the Director, ALA Digital Reference with managing email lists
- Added a new Presentations area to the RSC website and updated the RSC members page (including historical information) and the FAQ
- Consulted regularly with Secretary-Elect to share information, answer questions and revise work (Judy)

At ALA Midwinter and ALA Annual meetings:

- Assisted in arranging, and moderated a "pop-up" meeting for specialist communities in June 2017 (Judy)
- Presented on the current status of Toolkit content at CC:DA meetings (Judy)

Submitted by Linda Barnhart
Secretary, RDA Steering Committee
25 September 2017

2017 Report of the RDA Examples Editor

Contributions to the 3R Project:

- Participated in weekly core team calls about process and content
- Participated in calls with developers to ask questions and provide feedback
- Attended meeting before ALA Annual with members of the RDA Development Team, Dakota, and GVPi to discuss workflow and technical issues
- Attended session on DITA with Dakota before ALA Annual
- Prepared examples for draft chunks for review
- Prepared examples for RSC Chair on types of description and manifestation statements
- Completed online courses Introduction to DITA, The DITA Concept Topic Type, Introduction to Reuse in DITA, and Using DITA Maps and Bookmarks
- Assisting with determining best markup practices for RDA with DITA
- Assisting with devising efficient workflows for instruction approval and markup
- Designing new types of examples for Toolkit and creating DITA templates for examples in CMS

After the November 2016 meeting in Frankfurt:

- Prepared examples for 10 Sec final drafts of approved proposals
- Provided proofreading comments for Sec final drafts of approved proposals

To update the RDA content via February and April releases of RDA Toolkit:

- For the February release, provided examples changes for chapters 1, 2, 6, and 27
- For the April release, provided examples changes for chapters 3, 6, 11, 19, and 20
- For both releases, proofread changes on the stage site and in the PDFs from that site

For the May 2017 meeting in Chicago:

- Attended meeting with GVPi, and Design for Context
- Prepared mock-ups of new examples formats to discuss with RSC

Many individuals helped with the creation and revision of examples for RDA. In particular, Damian Iseminger, chair of the RSC Music Working Group, Kathy Glennan, ALA Representative, and Dave Reser, LC Representative provided valuable suggestions throughout the year.

Submitted by Kate James
RDA Examples Editor, RDA Steering Committee
28 September 2017

RDA Toolkit Update from ALA Publishing

Product Status

RDA Toolkit

For FY2017…

- Peaked at 2,881 active subscribers (up 1.5% from previous year and approx. 40 subscribers over FY2017 budget projections)
- 160 new subscribers and a renewal rate of 94%
- 9.337 users (up 14% from FY2016), with 3 users per subscription (same as last year)
- Revenues fell $107,000 short of budgeted projections; however, the budget projections were based on bad information and unrealistic.
- RDA Toolkit managed a profit this year and will make royalty payments to the RDA Fund and to the Copyright Holders
- 1,376,627 sessions (up approx. 68K from FY2016)
- 3,588,248 million document page views (down 500K)
- 631,627 search page views (up 150K)
- 2.44 pages viewed per visit (down from 3.15)

RDA Toolkit Recent Releases

August 2017

- Update of German translation, bringing it up to date with April RDA Update
- Updates to LC-PCC PS, NLA PS, MLA BP, KBSP, and D-A-CH AWRs
- German Glossary synched with Registry

October 2017

- Update of Catalan translation, bringing it up to date with April RDA Update
- Updates to D-A-CH AWRs
- Catalan Glossary synched with Registry

RDA Toolkit Future Releases

December 2017

- Update of French and Finnish translations
- Updates to Finnish and French-language policy statements

January 2018?

- Addition of Norwegian translation

RDA Print: 2018 Revision and RDA Essentials

- We do not anticipate issuing new print versions until after the LRM-related changes have been implemented (August 2018)

Development Plans

New and Proposed Content

- Work continues on DCRM for RDA. RMBS expects the policy statements to be ready for Toolkit publication following the completion of the 3R project
- Policy Statements from the Danish National Library will be added to the Toolkit after the completion of the 3R project.
- An agreement has been reached with the National Library of Hungary for a Hungarian translation of RDA that will appear in the Toolkit following the completion of the 3R project.
- An agreement with Biblioteca Alexandrina on an Arabic translation for the Toolkit is nearing completion.

Toolkit and CMS Development

- See documents on 3R for full details on this subject.
- We have progressed significantly on the synchronization project. As stated above the glossary synch process has been extended to the updated German and Catalan translations. The synch process also includes pulling in the vocabulary lists from the Registry.
- A new translation software (Trados) was implemented this spring. This change should eliminate the inefficiencies and bugginess that has plagued the translation process throughout the toolkit's history. Translation of the 3R changes to the RDA text will be done using Trados, and, while the process will have its bumps, it should lead to a much smoother translation process post-3R.
- A new CMS has been installed and is being tested by the RSC core team. It uses a HTML-based version of oXygen editor, which should relieve accessibility and loading issues associated with the old Java-based version of the editor.

RDA Registry

Registry development work has focused on improving editing tools for both the RSC and translators of RDA Reference. Improved site navigation and simplified input sheets are nearly ready. We are also looking to add more metadata to the registry that will enrich Toolkit content and allow for a variety of display options.

RDA Development Team

In the recent months the Dev Team has…

- Participated in 3R project development which has limited the time for unrelated work
- Supported further RIMMF development, including application for an IMLS grant to fund further development of the software