To: RDA Board
            and
          RDA Steering Committee

From: Kathy Glennan, RSC Chair

Subject: Annual report for 2019

This is the Annual Report of the RDA Steering Committee (RSC) to the RDA Board for the calendar year 2019. The chair of the RSC Kathy Glennan, prepared the report with assistance from the RSC and RSC Secretary, Linda Barnhart.

The RSC met in person from October 21-25, 2019 in Santiago, Chile. The meeting focused on planning for the post-3R Project environment, including a deeper dive into some of the more challenging areas of RDA content. A summary is available in the Outcomes document and public minutes are also available on the RSC website.

The group also conducted business through monthly conference calls before the in-person meeting and held its first asynchronous meeting September 16-19, 2019. The asynchronous meeting was held using Basecamp; public minutes are available on the RSC website.

3R (RDA RESTRUCTURE AND REDESIGN) PROJECT

The 3R Project was the major focus of the RSC and the RSC core team in 2019. To manage the project, the core team held regular weekly conference calls and met in person before and after the American Library Association meetings in January and June, and before the RSC meeting in Santiago.

Two key milestones were achieved in 2019:
- Stabilization release and public announcement on April 30
- Switchover plan announced October 15

Public-facing Toolkit milestones achieved in 2019 include:

Date	Development
January 7	New release published, which included an expansion of elements (agent breakout elements)
February 21	New release published, focused primarily on improved functionality and display
April 30	New release published: stabilization release for the English text
May 22	Followup release published, which included print PDF capability, citation numbers and Help screens
July-August	Accessibility testing work and announcement that accessibility goals were met
September 5	New release published, which included new Revision History section
October 15	Switchover plan announced

RDA Content

Further development and refinement of concepts, structures, and elements took place throughout 2019.

The internationalization of RDA content continued to be a key area of focus. A report shared at the Santiago meeting, Western and Christian Bias in the 3R Toolkit (agenda and appendix item 166), provided the impetus for specific ideas and broader discussion.

The "agent breakout" elements developed in 2018 were implemented in the beta Toolkit in January 2019. The treatment of common and collective titles was refined, and shortcut elements for contributors to aggregates were developed. Significant work was done to create specific instructions for aggregates and diachronic works within element files. Changes to "content elements" to move them from Expression to Manifestation were made. The concept of "expression excerpts" began to be explored.

Discussion and planning began on how string encoding schemes should be managed in the Toolkit, which led to an ongoing, broader discussion of community responsibilities.

A number of new guidance chapters were drafted and published: Aggregates, Application profiles, Diachronic works, Fictitious and non-human appellations, RDA implementation scenarios, and User tasks.

New processes were developed that support the tracking of changes to RDA content and the automated building of Release Notes; this was tested in the September release.

New processes utilizing Basecamp and Google Drive were also developed to support Fast Track changes to RDA content. These processes were tested with three Fast Track proposals in 2019.

RDA Reference

RDA Reference (the RDA element sets and the RDA value vocabularies) 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.

The backend database infrastructure that supports RDA Reference moved to Dakota Systems as of August 1. Dakota continues to develop and test this new Staff Registry.

GitHub release 3.3.0, the last with data from the previous backend database, was done on August 9.

Thanks to diligent work at the British Library and the Library and Archives Canada, improvements have been made to the MARC mappings spreadsheets, including mapping additional elements. The development of mappings for linked data URIs is underway. Mappings are part of the Element Reference section in Toolkit element pages.

RDA Translations

RDA translations continue to be a significant focus of activity. Stabilization of the English text was driven by the need for translators to have an unchanging text in order to begin their work.

The translators started with the RDA value vocabularies files in mid-2018. RDA element sets were shared with the translators in February 2019. Translations Team Liaison Officer Daniel Paradis Implemented a new process to release RDA Reference files to translators using Google Sheets in order to minimize risk of errors and simplify file management. The translators share information and questions through a wiki managed by Paradis. Also new this year is the implementation of Trados Groupshare software, which provides an efficient process for translating RDA files and keeps them synchronized with the English text. Training on Trados Groupshare was held in September and October.

Translations of RDA Reference were finished in the autumn by the Finnish and Italian translators. The Finns then translated the boilerplate and page structure terms that facilitate the basic RDA infrastructure and moved on to translating the guidance chapters. The Norwegian team is also moving forward quickly.

A meeting of the translators was held in conjunction with the EURIG annual meeting on May 2 and was attended remotely by Paradis and James Hennelly. A strawman document on RDA role elements and gender by Gordon Dunsire was discussed at this meeting.

Policy Statements

There was considerable work done by many parties to prepare to include Policy Statements in the beta Toolkit. The Policy Statement writers planning group held monthly conference calls, and this planning group expanded in November to include all policy statement writers. The planning group focused its efforts on preparing the specification for a script that would create "fill in the blank" files to link policy statements to Toolkit instructions. The script was prepared by Dakota Systems, with testing taking place in the second half of 2019, and the script was finalized in December. Within their own institutions, key policy statement writers began processes for making policy decisions and preparing new policy statement text.

PEOPLE

RSC Membership

Kathy Glennan began her term as RSC Chair on January 1.

Gordon Dunsire began his term as Technical Team Liaison Officer on January 1.

Honor Moody became the RDA Examples Editor Elect on May 1, overlapping with Kate James in an eight-month training period.

Kate James concluded her term as RDA Examples Editor on December 31.

The RSC in the Biblioteca del Congreso Nacional de Chile. Front row: James Hennelly, Renate Behrens, Catherine Amey, Linda Barnhart. Second row: Kathy Glennan, Ebe Kartus, Honor Moody, Chris Oliver, Thomas Brenndorfer. Third row: Kate James, Gordon Dunsire, Daniel Paradis.

RSC Working Groups

The two standing working groups—the Technical Working Group (Gordon Dunsire, chair) and the Translations Working Group (Daniel Paradis, chair)—continue to make progress. Each group made some adjustments to their membership.

Other task-and-finish working groups were thanked and discharged in June.

A new task-and-finish working group, the Application Profiles Working Group, was charged in mid-December. The group has a two-year assignment and is chaired by Alan Danskin.

Support from Regional Groups

- EURIG continued their work on application profile parameters and concepts. The EURIG Editorial Committee worked out a first draft in winter 2018/19 and sent it to the RSC for comments at the end of March. The revised EURIG draft is the basis for the work of the Application Profiles Working Group.
- NARDAC took on the study of the use of the unconstrained element set as a possible basis for more user-friendly public-facing labels.
- ORDAC provided further work to advance and refine the concept of Collective Agent through a discussion paper.

Collaboration with Other Groups

Representatives of the RDA Steering Committee and of the Organizer Group of the Annual BIBFRAME Workshops in Europe (among them Library of Congress/NDMSO, LD4P, and Share-VDE) began a conversation in June 2019 about the relationship and interoperability between RDA and BIBFRAME. The group identified short-term and longer-term tasks to pursue and will continue to meet and discuss.

The RSC took notice of a number of developments within the Program for Cooperative Cataloging (PCC) during the year that resulted in increased communication between the RSC Chair and PCC leadership. The RSC Chair provided additional information to clarify PCC public statements in their Position Statement on RDA and on decisions from the November 2019 PoCo meeting.

A MARC/RDA Working Group, convened by the Library of Congress, began work near the end of 2019. The tasks of the Group are to look at how to incorporate changes into MARC21 resulting from the changes to Toolkit as part of the 3R project. It will be a small group of experts; the RSC is represented by Ebe Kartus, the Wider Community Engagement Officer.

The RSC Chair contacted ONIX leadership in December to inquire if there is justification for continuing a formal liaison relationship.

The following people are liaisons to these groups:

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

Protocols exist between the RSC and the groups listed here:

- 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.

OUTREACH

The following list includes significant RDA events, primarily half-day or full-day offerings; presentations about RDA Toolkit or content as part of other meetings may be found on the 2019 presentations page of the RSC website.

Date	Title	Meeting	Approximate number of attendees
January 25	RDA Toolkit Redesign Workshop (preconference; using application profile templates)	American Library Association Midwinter Meeting, Seattle, Washington USA	80 participants
March 2-5	RDA Study Visit by Gordon Dunsire	Dominican Institute for Oriental Studies, Cairo, Egypt and Biblioteca Alexandrina, Alexandria, Egypt	
May 10	Getting a Handle on the New RDA Toolkit	Webinar to review the impact of the April 30 release of the stabilized English text of RDA	1400 registrants with 900 participants
June 21	RDA Toolkit Redesign Workshop (preconference; using RIMMF4)	American Library Association Annual Meeting, Washington, DC	80 participants
August 21	RDA: Resource Description and Access 2019	IFLA Satellite Meeting, Aristotle University of Thessalonika Library and Information Centre	111 participants

PROCESS AND COMMUNICATION

Activity in 2019 on RDA-L, an online forum for discussion of RDA:

- Approximately 3,600 subscribers (3,460 subscribers in December 1, 2018)
- 943 messages posted (666 posted in 2018)

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

User feedback on the beta Toolkit was requested via an online form when the beta site was released. For the calendar year 2019, approximately 280 submissions were made through this feedback form, some comprising multiple points. In addition, the RSC received substantive feedback from several national libraries, national cataloguing committees, and task groups. A comprehensive review was undertaken in June to assess and address the feedback received via every avenue. In lieu of individual responses, the RSC expressed its gratitude in a website announcement.

The RSC substantially revised its entire Policy Documents series, including re-naming the series to Operations Documents. The RSC implemented a new numbering scheme for its internal documents.

Eleven announcements, 26 documents, and 32 presentations were posted to the RSC website during 2019. New in 2019 was the public posting of RSC Papers, which are briefing papers discussed at in-person and asynchronous RSC meetings.

RSC website updates included significant revision to the Documents page and a major update to the Beta Toolkit/3R Project FAQ. A new section of RSC reports to the RDA Board was added to the Restricted Documents part of the site.

Three articles about RSC activities were published in the June 2019 issue of the *IFLA Metadata Newsletter*, and one article was in the December 2019 issue.

The RSC continued its active use of Basecamp, Google Drive, and email throughout the year. A "Dev" (development) site was established in November that is a parallel environment to the beta site. It is used to experiment with and test functionality and data without the expectation of future upload to the beta site.

Reports for 2019 from RSC members and liaisons (25 pp., beginning on page 29) are published as part of the public minutes of the Santiago meeting on the RSC website.