To: RDA Board
              and
            RDA Steering Committee

From: Kathy Glennan, RSC Chair

Subject: Annual report for 2020

This is the Annual Report of the RDA Steering Committee (RSC) to the RDA Board for the calendar year 2020. The report was prepared by Kathy Glennan, RSC Chair, with assistance from the RSC and RSC Secretary, Linda Barnhart.

The impact of the COVID pandemic from March through December affected RSC activities worldwide by disrupting work processes, priorities, presentations, and meetings. The RSC meeting planned for October 2020 at the National Library of Israel shifted to a virtual meeting. The Outcomes document, regular reports, and public minutes for that meeting provide more detail about meeting content.

The RSC held scheduled asynchronous meetings in January, April, and July; public minutes are found at these links.

RSC Action Plan 2020 Outcomes

The RSC developed its first rolling three-year Action Plan (RSC Action Plan 2020-2022) at the beginning of 2020, modelled on the action plan of the RDA Board. RSC outcomes for the 2020 Action Plan are reported below.

1   Develop RDA as a responsive and dynamic standard

a.   Begin publishing translations
     Partial translations of RDA instructions in Finnish and Norwegian began to appear with the September 2020 release of RDA Toolkit and are under active development. Translations of RDA Reference data continue to be submitted; the process for integrating these data into the Staff Registry continues to be refined.

b.   Begin publishing policy statements
     The British Library and the Library of Congress policy statements began to appear in the April 2020 release, and are increasing in number with every release. The Music Library Association Best Practices and Finnish policy statements are anticipated to begin to be added in April 2021.

c.   Stabilize Registry functionality and data
     The Staff Registry—the back end of the RDA Registry—has stabilized, with refinements continuing for integrating translations data.

The RDA Registry—the public front end and gateway to GitHub data—underwent significant updating and improvements.

d.   Implement decisions on Expression excerpts issues
This task has been postponed until it can be considered by the Technical Working Group.

e.   Implement decisions on RDA Content Elements issues
These changes to RDA were implemented in the April 2020 release.

f.   Implement decisions on SES instructions
The RSC agreed that instructions for string encoding schemes (SESs) belonged more properly in community-based policy statements than in RDA itself. Instructions based on specific string encoding schemes were removed from base RDA and added to policy statement files so that they could be evaluated by those communities. Action on these instructions is now in the hands of those communities.

g.   Continue RDA editorial cleanup: Language markup project and "term" and "italics" markup consistency
Both of these editorial cleanup projects were completed. Ongoing editorial cleanup based on feedback is done as it is received. Examples were added or updated for over 100 elements and were added to the guidance chapter on normalized transcription.

h.   Develop relationship matrix and visual browser
Improvements to the display and filtering of the element list at the end of each entity page were made as part of the April 2020 release. Work on the visual browser was postponed indefinitely.

i.   Receive and act on initial recommendations of Application Profiles Working Group
The Working Group submitted an interim report in April and an update in October.

2   Increase the adoption of RDA
a.   Add representation to RSC from Latin America and the Caribbean
The RSC awaits next steps from that region.

3   Provide relevant governance
The RSC updated RSC/Operations/4 (Policy and Procedures for Updating RDA Content); developed procedures for the virtual (synchronous and asynchronous) meeting in October; and is developing governance processes for the Community Resources area in Toolkit.

The Standing Operational Tasks accomplishments are addressed in other parts of this report.

3R (RDA Restructure and Redesign) Project

A key milestone was achieved on December 15 when the 3R Project formally concluded. The beta Toolkit became the official version of the RDA standard. More information is available on the Toolkit blog and in RSC/Papers/2020/1.

To manage the 3R Project throughout 2020, the Core Team held regular conference calls and met in person before the American Library Association meeting in January.

Post-3R, the RSC will phase out the Core Team but will keep monthly "administrative checkin" calls. Similarly, the informal Technical Team will be reconstituted as the RDA Development Team and will continue to have monthly calls about technical infrastructure issues and processes.

RDA Content

Further development and refinement of concepts, vocabularies, and elements took place throughout 2020. The RSC also approved four Fast Track change recommendations, which improved clarity and consistency in specific RDA instructions.

String encoding schemes: The RSC agreed that instructions for string encoding schemes belonged in community-based policy statements rather than in base RDA.

Community resources: As an outgrowth of its work on string encoding schemes, the RSC began to define the parameters for a new Community resources area within RDA Toolkit, to house community vocabularies and community refinements. Content from original Toolkit appendices such as abbreviations, capitalization, and terms of rank will be re-located here, organized by language, as part of the shift to an international focus.

Internationalization: The RSC received a report, prepared by Gordon Dunsire, on progress made to support the internationalization strategy of the RDA Board.

Fictitious entities: Text was added to some elements and to the guidance chapter "Fictitious and non-human appellations" to provide instruction on fictitious places and timespans.

RDA conformance: The RSC discussed and made decisions on this topic, including adding a guidance chapter titled "Well-formed RDA."

RDA entity boundaries: The RSC discussed and made decisions on this topic, including adding a guidance chapter titled "Entity boundaries." Text was also added to entity chapters and to appropriate elements.

RDA implementation scenarios: The RSC discussed and made decisions on this topic, including adding a guidance chapter titled "RDA implementation scenarios."

RDA Vocabulary Encoding Schemes: Text was added to the elements that include an option to use an RDA Vocabulary Encoding Scheme to indicate whether the vocabulary is complete or incomplete. The

Units of time vocabulary encoding scheme was added. Significant adjustments were made to the **Type of binding** vocabulary encoding scheme.

Representative expression elements: Specific options were added for representative expression elements for aggregating works.

Shortcuts: Text was added to the guidance chapter "Introduction to RDA" page on Data elements to provide more information on relationship shortcuts.

RDA Registry

The RDA Registry contains vocabularies that represent the RDA entities, elements, and controlled terminologies as RDA element sets and RDA value vocabularies in Resource Description Framework (RDF). Data contained in the Registry populate the Glossary, vocabulary encoding scheme term lists, and sections of each element page in the RDA Toolkit.

The RDA Registry produced eight GitHub releases in 2020, beginning with 3.4.0 in April. Most were pre-releases that supported the 3R Project. The November release, 4.0.2, was a full release that updated the official Toolkit in conjunction with the switchover.

Maps and alignments to and from RDA and other element sets are maintained and made public via the RDA Registry. Significant work was undertaken in 2020 to distinguish between maps and alignments. A new map from RDA properties to unconstrained properties was published. Thanks to diligent work at the British Library and the Library and Archives Canada, improvements have been made to maps from RDA properties to MARC 21 Authority and Bibliographic encodings.

The Registry website underwent significant updating in 2020 during the transition to the new Technical Team Liaison Officer, who has oversight responsibility for the Registry.

The Staff Registry, the backend database infrastructure managed by Dakota Systems for maintaining RDA Registry data, has stabilized. Work continues with testing, and refining translation workflows.

RDA Translations

Translations continue to be a significant focus of activity and development. Finnish and Norwegian translators moved on from translating RDA Reference data to translating instructions. The September 2020 release of RDA Toolkit included a full translation of the user interface and many RDA instructions in those languages. The December release updated and increased Finnish and Norwegian content.

Translators continued to make progress with RDA Reference translations and have been actively identifying and submitting inconsistencies as well as recommending improvements to the base English text. Translations Team Liaison Officer Daniel Paradis continues to review the translation spreadsheets when submitted to make sure that uploads to the Staff Registry go smoothly. He has also been

instrumental in suggesting improvements and refinements to the complex workflow that keeps translations synchronized with the dynamic base text.

Policy Statements

The Policy Statement Writers Group expanded to include representatives from all policy statement communities at the beginning of the year. The group had been an "early adopters" group since its formation in late 2018.

This year saw the final testing, analysis, and production runs of the "More Bang" script. This script produced templated files with a structure and links between base RDA and the policy statements, eliminating tedious work for the policy statement writers. Once these files were created, policy statement writers could add their text to the content management system that holds RDA data and, after processing, see the resulting public display. The technical challenges required a significant learning curve.

The group has been very collaborative and openly shared techniques and insights. The British Library began with an intensive analysis and manual approach. The Library of Congress began with an intensive analysis and a scripted approach. Files were tested in the April release, and have grown in number with each subsequent release.
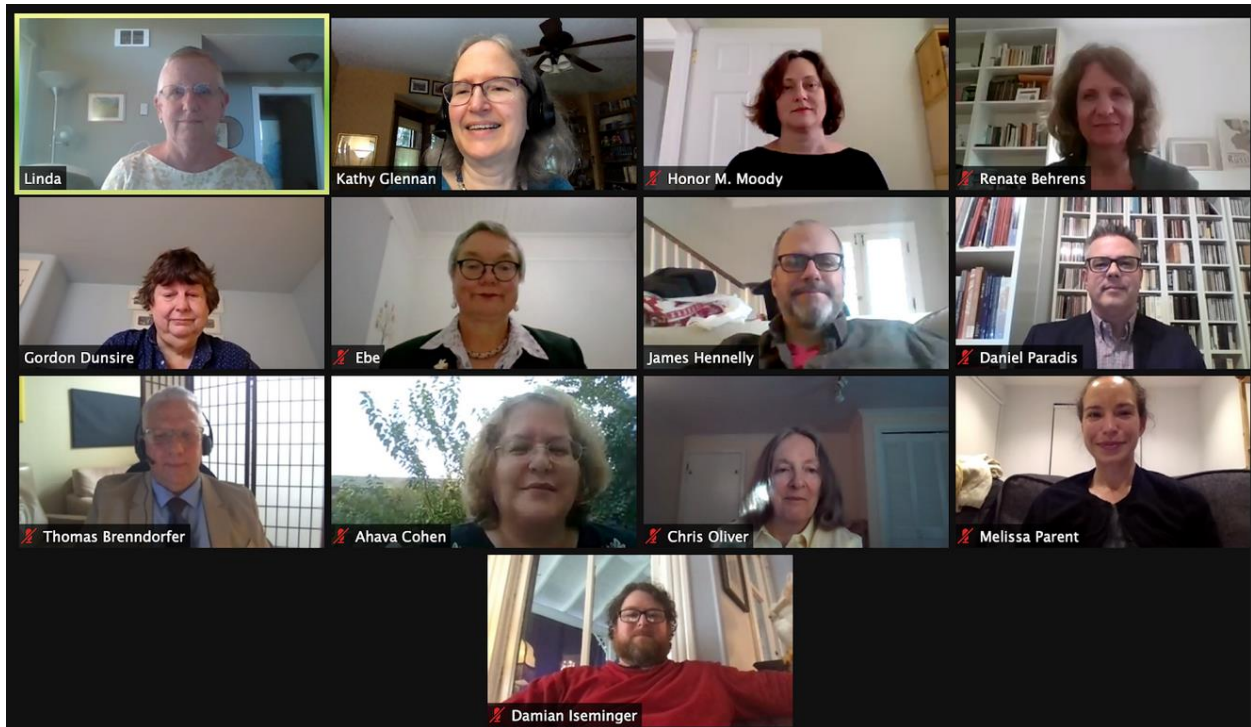
RSC Membership

Catherine Amey stepped away as the representative from Oceania (ORDAC) in March and was succeeded by Melissa Parent.

Damian Iseminger was appointed Technical Team Liaison Officer-Elect in May.

Gordon Dunsire concluded his term as Technical Team Liaison Officer in December.

The RSC began discussions on formalizing the role of Past Chair as part of its governance structure. Details will be forwarded for RDA Board approval in January 2021.

The RSC responded to a series of questions posed by the RDA Board regarding governance as part of the Board's review and evaluation of the governance model.

The RSC at its virtual meeting October 2020 (Left to right, top to bottom): Linda Barnhart, Kathy Glennan, Honor Moody, Renate Behrens, Gordon Dunsire, Ebe Kartus, James Hennelly, Daniel Paradis, Thomas Brenndorfer, Ahava Cohen, Chris Oliver, Melissa Parent, Damian Iseminger.

RSC Working Groups

The RSC's two standing working groups—the Technical Working Group (Gordon Dunsire, chair) and the Translations Working Group (Daniel Paradis, chair)—continued to make progress. The RSC approved new terms of reference, tasks, and membership for the Technical Working Group.

A significant effort was undertaken to transfer knowledge and update processes to facilitate the shift in leadership of the Technical Working Group in January 2021 from Gordon Dunsire to Damian Iseminger. The RSC approved the formation of an RDA/MARC 21 Alignment Task Force as a subgroup of the Technical Working Group. Maintenance of this alignment has been informally carried out by MARC 21 experts from the British Library (for MARC 21 Bibliographic) and Libraries and Archives Canada / Bibliothèque et Archives Canada (for MARC 21 Authority). This action recognizes and formalizes the long-term maintenance of the RDA to MARC 21 alignments.

The Application Profiles Working Group continued its work and submitted an interim report for consideration at the April RSC asynchronous meeting and an update for the October RSC virtual meeting. The group is chaired by Alan Danskin and is scheduled to conclude its work at the end of 2021.

Collaboration with Other Groups

The RSC took notice of and engaged with a number of developments within the Program for Cooperative Cataloging (PCC). These conversations surrounded:

- MARC 21 subfield $0/subfield $1 differences
- PCC implementation of the official Toolkit information and timetable
- RDA conformance and what it means
- PCC LRM training module feedback

The RSC Chair engaged in correspondence with the NARDAC Chair regarding the PCC Linked Data Advisory Committee's view of RDA.

The MARC/RDA Working Group, convened by the Library of Congress, continued its work. The task of the Group is to prepare discussion papers and proposals to incorporate changes in MARC21 resulting from the changes in RDA. The RSC is represented by Ebe Kartus, the Wider Community Engagement Officer.

The RSC Chair attended all the virtual MARC Advisory Committee meetings in June/July as an invited expert, contributing to the discussion of final versions of proposals and discussion papers, many related to RDA elements.

Several RSC members met with key leaders in the BIBFRAME community in January in conjunction with the ALA Midwinter meeting for updated information and to maintain communication. The RSC hopes to initiate a map or alignment with BIBFRAME in the coming year.

The following RSC members 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

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 worldwide pandemic took a toll on RSC outreach efforts. Listed below are presentations, almost all made virtually. Some presentations are posted on the RSC Presentations 2020 page of the RSC website.

Date	Title	Meeting
January 24	RDA Toolkit: A Crash Course, presented by several RSC and NARDAC members	Two identical three-hour sessions presented at the American Library Association Midwinter Meeting, Philadelphia, Pennsylvania USA
January 25	Overview of the RSC Action Plan 2020-2022, presented by Kathy Glennan	RDA Update Forum, sponsored by NARDAC at the American Library Association Midwinter Meeting, Philadelphia, Pennsylvania USA
January 27	Deliverance: A Journey Through the RDA Workflow, presented by James Hennelly	RDA Linked Data Forum at the American Library Association Midwinter Meeting, Philadelphia, Pennsylvania USA
February 26	Creating Linked Data for Music with RIMMF4, workshop led by Kathy Glennan	One 4.5 hour workshop presented at the Music Library Association Annual Meeting
May 19	Report from the European representative to the RSC 2020, presented by Renate Behrens; RSC Chair report to EURIG, presented by Kathy Glennan	EURIG Annual Meeting (virtual)
May 21	String Encoding Schemes: Community Choice in RDA, presented by Kathy Glennan	Program for Cooperative Cataloging, Operations Committee meeting (virtual)
May 28	Lecture about RDA, presented by Renate Behrens	Hochschule für den Öffentlichen Dienst in Bayern, Fachbereich Archiv- und Bibliothekswesem
June 18	Update on the new RDA Toolkit, presented by Thomas Brenndorfer	Ontario Cataloging and Technical Services Interest Group inaugural meeting (virtual)
August 3	RDA – Hot Topics, presented by Thomas Brenndorfer; Translating the new RDA Toolkit into French, presented by Daniel Paradis; 3R is Almost Done—What's Next, presented by Kathy Glennan	NARDAC RDA Update Forum (virtual)
September 15	One more time, 3R in DACH, presented by Renate Behrens; DACH RDA Handbook, presented by Renate Behrens; Ongoing RDA Development: What's Next for the RSC? presented by Kathy Glennan	RDA in Europe (co-sponsored by EURIG and the IFLA Cataloguing Section) (virtual)
September 18	Wo spielt die Musik nach dem 3R-Projekt, presented by Renate Behrens	Jahrestagung der IAML Deutschland, Bonn, Germany (virtual)
October 16	Work group audiovisual resources at the Committee on Library Standards for German Speaking countries, presented by Renate Behrens and Anna Bohn	OLAC 2020 Conference (virtual)

Date	Title	Meeting
November 12	LRM in the RDA Toolkit: an Overview, presented by Kathy Glennan	Tercer Coloquio sobre RDA en América Latina y el Caribe (virtual)

Process and Communication

Activity in 2020 on RDA-L, an online forum for discussion of RDA:

- Approximately 3,669 subscribers (approximately 3,600 subscribers in 2019)
- 283 messages posted (943 posted in 2019)

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

Ongoing issues with the list software necessitated a re-birth of RDA-L on the ALA Connect platform in mid-December. Subscribers could not be transferred and were required to re-subscribe. It is expected that it will take time in 2021 for RDA-L to get back to its regular level of activity and number of subscribers.

User feedback on the beta Toolkit was requested via an online form when the beta site was released. For the calendar year 2020, 306 submissions were made through this feedback form, some comprising multiple points.

Six announcements, 33 documents, and 16 presentations were posted to the RSC website during 2020.

RSC website updates included significant revision to the Documents page and the RDA Frequently Asked Questions. German and Hungarian translations of this FAQ were published. A new subsection in the Restricted Documents area was added for RSC Reports to the RDA Board, with links to reports beginning in April 2016.

Articles about RSC activities were published in the June and December 2020 issues of the *IFLA Metadata Newsletter*.

The RSC continued its active use of Basecamp, Google Drive, email, GoToMeeting, and Zoom throughout the year.