To: RDA Board
                 and
             RDA Steering Committee

From: Kathy Glennan, RSC Chair

Subject: Annual report for 2021

This is the Annual Report of the RDA Steering Committee (RSC) to the RDA Board for the calendar year 2021. The report was prepared by Kathy Glennan, RSC Chair, with assistance from the RSC and RSC Secretary, Linda Barnhart.

The COVID pandemic continued to disrupt RSC activities worldwide. The traditional in-person RSC meeting planned for October 2021 again shifted to a virtual meeting. The Outcomes document and public minutes for that meeting provide more detail about the virtual meeting content.

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

This was the first year of post-3R Project activity for the RSC, marking the beginning of "new normal" processes. A 3R Project Final Report was published. More than triple the number of Fast Track changes were evaluated. Several substantive proposals were reviewed and approved.

RSC Action Plan 2021 Outcomes

The RSC updated its rolling three-year Action Plan at the beginning of the year. RSC achievements for the year 2021 were:

1   Develop RDA as a responsive and dynamic standard

a.   Receive and act on interim report of Application Profiles Working Group (deferred from 2020)
The RSC expects to receive the final report from the Working Group shortly and will act on it at the next asynchronous meeting.

b.   Continue review of the Resources tab and development of Community resources and Community vocabularies
Ongoing; this was a topic at all RSC meetings in 2021 and will continue to be discussed in 2022. Concerns were raised at the October meeting that have pointed toward re-thinking of this area of RDA Toolkit, which will be further explored in the coming year.

c.   Resolve pseudo-element issues
Completed and published in the April release.

d.   Review performance aggregates (amalgamation instructions) and initiate cleanup
Underway in the Technical Working Group; expected to be in the 2022 RSC Action Plan.

e.   Continue work on Extent issues by creating a working group
A chair and members have been appointed to the Extent Working Group, the terms of reference have been finalized, and the group was launched on 03 January 2022.

f.   Continue work on Place/jurisdiction issues by creating a working group
A chair and members have been appointed to the Place/Jurisdiction Working Group, the terms of reference have been finalized, and the group was launched on 11 January 2022.

g.   Begin work on Names of corporate bodies in more than one language/official language issues by creating a working group
A chair and members have been appointed to the Official Languages Working Group, the terms of reference have been finalized, and the group was launched on 24 January 2022.

h.   Begin work on reviewing treatment of religious content in RDA by creating a working group
A chair and members have been appointed to the Religions in RDA Working Group, the terms of reference have been finalized, and the group was launched on 24 January 2022.

i.   Begin BIBFRAME mapping
Planned by the Technical Working Group; expected to be in the 2022 RSC Action Plan.

j.   Prepare report to document the 3R Project
Final report posted on the RSC website on 28 October.

2   Increase the adoption of RDA

a.   Support regional groups in this "switchover" year with increased outreach
Presentations listed elsewhere in this report and on the RSC website. Elisa Sze, Education and Orientation Officer Elect, has started doing some outreach to educators.

b.   Provide orientation and support for RSC Representative from Latin America and the Caribbean when appointed
RSC/Operations/7 (Information for new RSC members and backups) was approved and posted on the RSC website on 30 August.

3   Provide relevant governance

a.   Establish new Working Groups: Extent, Place/jurisdiction, Names of corporate bodies in more than one language, Religious content
Done; see items 1e-h above.

b.   Recruit or re-appoint RSC members whose terms expire at the end of 2021, with sufficient overlap with current members for training purposes
Done; see RSC Membership section below.

    c.   Review existing protocols and assigned liaisons with other information standards groups
Expected to be in the 2022 RSC Action Plan.

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

RDA Toolkit

There were two releases of the official Toolkit in 2021.

The April release included:
- Addition of the Community Refinements section of the Community Resources area, including the text of the pseudo-elements
- Addition of more Library of Congress/Program for Cooperative Cataloging (LC/PCC) and British Library (BL) policy statements
- Introduction of a small number of Music Library Association (MLA) Best Practices
- Fixes and minor improvements to existing Toolkit functionality, including the introduction of blue highlight in the yellow Condition boxes to improve visibility

The July release included:
- Addition of more policy statements from LC/PCC, the BL and MLA
- Additions to the Community Refinements section of the Community Resources area
- Updates to the Finnish translation
- Inclusion of a new French translation of the Toolkit interface

The September and December releases were postponed due to issues with server migration.

Community Resources contains content that conforms to the RDA standard but is specific to communities rather than international in scope. In 2021, the Community Refinements subsection was added to provide space for more granular community-based refinements of RDA instructions to support string encoding schemes, transcription rules, and other string processing functions. Some refinements are legacy instructions that may have been used in RDA metadata statements in the past, such as the pseudo-elements. At the end of the year, however, the RSC began to reconsider some fundamental aspects of the structure and content of Community Resources, particularly for legacy instructions. Concerns were raised about maintenance and sustainability. This area will continue to be explored in the coming RSC meetings.

RDA Content

Further development and refinement of concepts, vocabularies, and elements took place throughout 2021. The RSC reviewed fifteen Fast Track changes, more than triple the number of the previous year, which improved clarity and consistency in specific RDA instructions.

Three proposals were discussed, adjusted, and approved. They will be published in the first release of RDA Toolkit in 2022.

RSC/EURIG/2021/1: Proposal to adjust label, definition, and alternate labels for Expression: *relief type*

> This proposal asserted that the label "relief type" was misleading because this element described neither the material of a relief model (plaster, wood, plastic, etc.) nor the surface form of the terrain (flat, hilly, mountainous, etc.), but only the representation of the relief on the map. Therefore, the new label "relief representation" was proposed with a more precise definition. This change also required an adjustment to the element label in the list of entity boundaries on the Expression entity page. The proposal was unanimously approved by the RSC and will be implemented in the first release in 2022. Final wording was published in the RSC Decisions document.

RSC/TechnicalWG/2021/1: Proposal for Realignment of Expression to Expression Relationship Elements

> The purpose of the proposal was voiced in the proposal abstract: "Analysis of the alignment between RDA and IFLA-LRM have revealed a misalignment between Expression: *based on expression* and LRM R24 *is derivation expression of* and Expression: *derivative expression* and LRM R24i *has derivation expression*… This proposal makes necessary changes to RDA to rectify the problems with the alignment, makes any implicit shortcuts explicit, modifies labels and definitions for consistency and clarity, and recommends the soft-deprecation of elements that are insufficiently differentiated in their definitions." A revised version of the proposal was unanimously approved by the RSC and will be implemented in the first release in 2022. Final wording was published in the RSC Decisions document.

RSC/TechnicalWG/2021/2: Implementing the Collections Model in RDA

> This proposal addressed the coverage of the concepts of "collections" and "collection level description" in RDA. It proposed new relationship and attribute elements, amendments to existing elements, two new vocabulary encoding schemes to support proposed attribute elements, and new terms for the RDA Terms vocabulary encoding scheme (also published in the RDA Glossary). The proposal, in four parts, was posted for public comment on the RSC website on 03 August. Most of the 67 recommendations were approved by unanimous consent, but a handful required deeper discussion. Foremost among the topics discussed was the definition and scope of the terms "metadata description set" and "metadata statement." Several recommendations will require follow-up actions, including drafting a new guidance chapter. The proposal as adjusted by RSC discussion will be implemented in the RDA Registry and RDA Toolkit and published in the first release in 2022. An RSC Decisions document was published that included the final wording of definitions and instructions, the new, deprecated and soft deprecated elements, and other changes, such as to element hierarchies and RDA vocabularies.

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 14 GitHub releases or pre-releases in 2021, beginning with 4.0.3 in February. The November release, 5.0.0, was a pre-release that included changes recently approved by the RSC related to the collections model as well as some corrections to the LRM map.

Maps and alignments from RDA to other standards are maintained and made public via the RDA Registry. The IFLA Bibliographic Conceptual Models Review Group shared comments about the RDA to LRM mapping, resulting in several small changes that were implemented by Technical Team Liaison Officer Damian Iseminger.

The Staff Registry, the backend database infrastructure for maintaining RDA Registry data, has largely stabilized. RDA ontology metadata was added for more efficient management. Work continues with fixing various bugs and refining translation workflows.

RDA Examples

New examples were added to RDA and existing examples were adjusted by RDA Examples Editor Honor Moody. Work began on full MARC examples and the editor communicated with individual RDA users about suggestions for new examples and changes to existing ones. Stylistic presentation questions about notes on examples remain under discussion, as is the ongoing review of the RDA Examples Guide.

RDA Translations

Translations continue to be a significant focus of activity and development. Updates to the Finnish and Norwegian translations were published in the July 2021 release. That release also included the introduction of the French language translation of the user interface as an aid to facilitate RDA training for French language speakers.

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 met monthly through conference calls. The group has been very collaborative and openly shares techniques and insights. The British Library completely re-thought its processes, implementing a scripted and batched method before the April release. Planning was done for a free public webinar "RDA Roundtable on Policy Statements" on 18 January 2022.

The April 2021 release of RDA Toolkit added more LC/PCC policy statements as well as more BL policy statements and introduced a small number of Best Practices from the Music Library Association. Policy statements for all continued to be added in the July 2021 release. Policy statements for the Finnish translation have been tested, with a fuller set expected for the first release in 2022. Policy statements from New Zealand are also underway.

RSC Membership

Damian Iseminger became Technical Team Liaison Officer on 01 January 2021.

Honor Moody was reappointed as RDA Examples Editor, with her new term concluding in December 2023.

Daniel Paradis was appointed for an additional year as Translations Team Liaison Officer, with his term concluding in December 2022.

Charlene Chou was appointed Wider Community Engagement Officer. She began as the WCEO-Elect on 01 September 2021 with a four-month training period that overlapped with Ebe Kartus, whose term expired on December 31. Charlene's term concludes in December 2023.

Elisa Sze was appointed Education and Orientation Officer in a co-opted position. This position facilitates effective RDA instruction relating to the official Toolkit and encourages and supports communities in their transition to the official Toolkit. This temporary position has a one-year term beginning January 1, 2022, with the possibility of one renewal upon mutual agreement. Elisa joined the RSC in September 2021 for orientation prior to the beginning of her term.

Renate Behrens was appointed Chair-Elect of the RSC. Her appointment in this role began in December 2021 and is effective through December 2022, overlapping with Chair Kathy Glennan. She will then begin a four-year term as Chair, from January 2023 through December 2026.

The RSC said farewell at the end of 2021 to several RSC members, who were thanked for their stellar and thoughtful service:
- Ebe Kartus, Wider Community Engagement Officer
- Thomas Brenndorfer, North America representative
- Renate Behrens, Europe representative (who was immediately welcomed back as Chair-Elect)
- Chris Oliver, Chair of the RDA Board

The RSC at its virtual meeting October 2021 (Left to right, top to bottom): Linda Barnhart, Kathy Glennan, Ebe Kartus, Thomas Brenndorfer; Charlotte Christensen, Elisa Sze, Daniel Paradis, John Trevor-Allen; Damian Iseminger, Melissa Parent, Renate Behrens, Charlene Chou; James Hennelly, Honor Moody.

Working Groups

Standing working groups:

Technical Working Group (Damian Iseminger, chair): The RSC approved new terms of reference, tasks, and membership for the Technical Working Group, which submitted two proposals for RSC consideration in 2021. The terms of reference for a standing subgroup—the RDA-MARC 21 Alignment Task Force—was approved.

Translations Working Group (Daniel Paradis, chair): The RSC also approved new terms of reference, tasks, and membership for the Translations Working Group.

Task-and-finish working groups:

Application Profiles Working Group (Alan Danskin, chair): This group is scheduled to conclude its work at the end of 2021. Its final report will be considered by the RSC at the following asynchronous meeting.

Extent Working Group (Thomas Brenndorfer, chair): This group has been appointed and will begin work in January 2022, with a planned end date of December 2023.

Official Languages Working Group (Peter Rolla, chair): This group has been appointed and will begin work in January 2022, with a planned end date of December 2023.

Place/Jurisdiction Working Group (Esther Scheven, chair): This group has been appointed and will begin work in January 2022, with a planned end date of December 2023.

Religions in RDA Working Group (Kate James, chair): This group has been appointed and will begin work in January 2022, with a planned end date of December 2023.

Collaboration with Other Groups

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 the Wider Community Engagement Officer.

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

Some RSC members met with developers at Ex Libris on March 3 to discuss linked data and the implementation of RDA.

The RSC Chair attended (as an observer) the BIBFRAME Data Exchange meeting on September 9-10.

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.

Date	Title and Presenter	Meeting
03 February 2021	"RDA in the New Toolkit: What's Different? What Stays the Same?" presented by Thomas Brenndorfer	2021 Ontario Library Association Super Conference
04 February 2021	"RDA in the New Toolkit: A Deeper Dive into the Changes," presented by Thomas Brenndorfer	2021 Ontario Library Association Super Conference
08 February 2021	"Standards in a new bibliographic world – community needs versus internationalization," presented by Renate Behrens	Bibliographic control in the digital ecosystem, a virtual international conference
23 and 24 February 2021	"Ask Anything" panel: Kathy Glennan and Damian Iseminger served as two of the three panelists, fielding questions about RDA, LC/PCC Policy Statements, OCLC practices, and other music cataloging questions (two sessions)	Music OCLC Users Group (online)
01 March 2021	The New RDA Toolkit: How did we get here, and what do we do next? presented by Kathy Glennan	Music Library Association and the Theatre Library Association (joint meeting online)
04 March 2021	Accessibility and the new RDA Toolkit, presented by Kathy Glennan	Music Library Association and the Theatre Library Association (joint meeting online)
16 March 2021	RDA Updates, presented by Kathy Glennan	Council on East Asian Libraries meeting (online)
29 March 2021	RDA and Community Resources, presented by Thomas Brenndorfer	NARDAC Update Forum (online)
29 March 2021	RSC Operations in 2021: A Return to "Normal," presented by Kathy Glennan	NARDAC Update Forum (online)
29 March 2021	"Update from ALA Digital Reference," presented by James Hennelly	NARDAC Update Forum (online)
20 April 2021	Global Standard, Local Choices -- The New RDA Toolkit, presented by Kathy Glennan	Webinar for ALA's CORE division (one hour)
28 April 2021	"Standards in a New Bibliographic World," presented by Renate Behrens	III. International Bibliographic Congress *Bibliographic information in digital culture* (online)
04 May 2021	"Report from the European Representative to the RSC 2021," presented by Renate Behrens	EURIG Annual Meeting
05 May 2021	"Projekt 3R für DACH-Bibliotheken," presented by Renate Behrens	EURIG Annual Meeting

Date	Title and Presenter	Meeting
05 May 2021	RDA and Community Resources, presented by Thomas Brenndorfer	EURIG Annual Meeting
16 July 2021	RDA Toolkit Demonstration, presented by James Hennelly	Webinar
30 August 2021	RSC in 2021: An Operational Reboot, presented by Kathy Glennan	NARDAC Update Forum (online)
30 August 2021	RDA Steering Committee -- Recent RDA Developments, presented by Thomas Brenndorfer	NARDAC Update Forum (online)
14 September 2021	NARDAC update + Community Resources, presented by Thomas Brenndorfer	RDA in Europe meeting (online)
15 September 2021	"Besonders, einzigartig, speziell, Communitygetriebene Erschließung in Kultureinrichtungen, Arbeitsgemeinschaft der Spezialbibliotheken in DACH" (English translation: "Particularly, unique, special : Community-driven cataloguing in cultural institutions), presented by Renate Behrens	Working Group of Special Libraries in DACH
20 September 2021	Translating RDA, presented by Daniel Paradis	Webinar for RDA Toolkit
23 September 2021	"What role can RDA/RDF play in the transition to linked library data?" with panelist Damian Iseminger	BIBFRAME Workshop in Europe 2021
06 October 2021	"Über Spartengrenzen hinaus : kooperative Erschließungs- und Normdatenarbeit in GLAMs" (English translation: "Beyond disciplinary boundaries : cooperative indexing and authority data work in GLAMs"), presented by Renate Behrens	Autumn Conference of the Documentation Section in the German Museums Association
08 October 2021	"Authority data as a link between cultural institutions, Community-driven standardization in cultural institutions," presented by Renate Behrens	Congress "Authority Data and Cultural Institutions," National Library of Latvia, Riga
27 October 2021	"Neue Regelwerke oder Wege aus der Komfortzone" (English translation: "New standards or ways out of the comfort zone"), presented by Renate Behrens	Swiss Library Congress in Bern
28 October 2021	Application Profiles: A Practical Guide for the Perplexed, presented by Melissa Parent	Webinar for RDA Toolkit
08 November 2021	Getting Ready to Use the New RDA, presented by Kathy Glennan	Reaching Across Illinois Library System webinar

Date	Title and Presenter	Meeting
15 November 2021	Entity Boundaries: Fixed or Fluid? presented by Honor Moody	Webinar for RDA Toolkit
01 December 2021	Démonstration du RDA Toolkit, presented by Daniel Paradis	Webinar for RDA Toolkit

Process and Communication

RDA-L

Activity in 2021 on RDA-L, an online forum for discussion of RDA, now on the ALA Connect platform:

- Approximately 1,500 subscribers (approximately 3,600 in 2020)
- 236 messages posted (283 messages posted in 2020)

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

User Feedback

User feedback on the Toolkit is submitted via an online form linked by a button in RDA Toolkit. For the calendar year 2021, 143 submissions were made through this feedback form. Acknowledgement of feedback was tested this year by the RSC Secretary to see if it is a sustainable workload.

RSC Website

Eighteen announcements, 34 documents, and 15 presentations were posted to the RSC website during 2020. The RSC website migrated to a server at Dakota Systems on 01 October 2021.

Other

Articles about RSC activities, including an article on Community Resources, were published in the June and December 2021 issues of the *IFLA Metadata Newsletter*.

The RSC continued its active use of Basecamp, Google Drive, email, GoToMeeting, and Zoom throughout the year. The PBWorks wiki (called Frankfurinitiative) which was used in the early days of the 3R Project, and whose content had been archived, was removed.

The RDA Assessment Group was formed following the April asynchronous meeting. Its role is to recommend how to handle RDA issues that fall in the middle ground between Fast Tracks and Discussion Papers/Proposals. The group is composed of the RSC Secretary and the regional representatives. Working in Basecamp, the Assessment Group addressed eight issues during 2021, seven of which were resolved.