



Guidance for Data Reference Standard Stewards

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Guidance for Data Reference Standard Stewards

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1. Purpose

This guidance provides good practices for prospective and current data reference standard (DRS) stewards to fulfill their role and responsibilities towards DRS under Appendix K of the [Directive on Service and Digital](#).

1.1 Scope

This guidance is specific to the DRS process and is intended for DRS stewards. DRS stewards are distinct from data stewards, domain stewards, and other stewardship roles that may exist in the Government of Canada

(GC).

DRS that refer to metadata may be referred to as a metadata reference standard. The guidance below also applies to these standards.

2. Key concepts and roles

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2.1 What is a data reference standard?

Data reference standards are mandatory policy instruments issued by the Chief Information Officer (CIO) of Canada that set out how data or metadata must be presented across government departments. DRS are issued under Appendix K of the *Directive on Service and Digital* (the directive) and departments described in section 6 of the directive must apply these standards to their systems and datasets.

Each DRS is comprised of two main components:

- the **data standard component**, which may focus on terminology, codes, values, formats, fields or more in datasets and systems
 - this component is managed by the DRS steward (GC department(s))
- the **policy instrument component**, which describes the policy requirements and application of the DRS
 - this component is managed by the DRS custodian (Treasury Board of Canada Secretariat (TBS))

Topics chosen for a DRS are determined by many factors, including groups who submit a DRS Intake Form (see 3.1 Preliminary review). Prospective standards fall into one of three main categories for publication as a DRS:

- **Adopt** an existing standard as-is for government-wide use (for example, a departmental standard, an international standard)
- **Adapt** an existing standard (for example, adapting a departmental standard to fit the entire GC, adapting an international or community-based standard to fit the Canadian context, updating an existing standard to reflect new terminology)
- **Author** a new DRS to meet the needs of the GC

For a list of published DRS, visit the [Inventory of data and metadata reference standards](#).

2.2 Why are data reference standards important?

Presenting data and metadata consistently helps ensure high data quality, as outlined in the [Guidance on Data Quality](#), and supports the FAIR principles, making data more findable, accessible, interoperable, and reusable (see the [Guidance on Assessing Readiness to Manage Data According to the FAIR Principles](#)). DRS standardize data and metadata across multiple systems and datasets, enabling greater interoperability and alignment in how data is managed and used across government departments and systems.

For more information about the importance of DRS to GC operations, visit the [About data and metadata reference standards](#) page.

2.3 Roles and responsibilities

2.3.1 What does a data reference standard steward do?

The DRS steward is the GC department (or multiple departments) that has the organizational mandate or recognized subject matter expertise on a particular topic and is responsible for the **data standard component** of the

DRS. The role of the DRS steward is to ensure that the data standard component is defined, current and fit for use across the GC.

The DRS steward for each DRS depends on the subject or focus of the data standard component and is often referred to by the name of the GC department. In practice, the roles and responsibilities of the DRS steward are assigned to a specific business unit within a department.

The DRS steward is responsible for the data standard component throughout its entire life cycle, including its development, implementation and maintenance. The DRS steward is selected at the beginning of the DRS development process and is supported throughout this process by the DRS custodian. For more information about the selection of a DRS steward, see [3.1 Preliminary review](#).

2.3.2 What does a data reference standard custodian do?

The DRS custodian is responsible for the **policy instrument component** of the DRS. The custodian of all DRS is the Office of the CIO of Canada within TBS. TBS provides the authority under the CIO of Canada to ensure that DRS are mandatory instruments, applicable to all departments subject to the *[Directive on Service and Digital](#)*.

The DRS custodian provides strategic and operational support to DRS stewards throughout the life cycle of the DRS. This includes supporting stewards with the drafting, review and publication of a DRS, as well as ensuring that proposed DRS align with whole-of-government needs. The DRS custodian is the main point of contact for the DRS and supports the application of these standards as a mandatory policy instrument.

2.3.3 Responsibilities of the DRS steward and DRS custodian

The DRS steward and DRS custodian work together throughout the life cycle of the DRS to support its development and ongoing upkeep. While there are many individual steps to developing a DRS, the development process follows five main phases:

1. Preliminary review phase
2. Development phase (includes the development of the data standard component and the policy instrument component)
3. Endorsement phase
4. Publication phase
5. Maintenance phase

Table 1 provides a summary of the key activities undertaken by the DRS steward and DRS custodian during each phase of the DRS development process. For more information about each phase, see [3. Data and metadata reference standard development process](#).

Table 1. Summary of key responsibilities

DRS phase	DRS steward responsibility	DRS custodian responsibility
Preliminary review	• submitting prospective standards through the DRS Intake Form • providing additional detail and materials to support the evaluation of prospective standards	• evaluating prospective standards and assessing their suitability for government-wide use • identifying and/or confirming the DRS steward

DRS phase	DRS steward responsibility	DRS custodian responsibility
Development	• leading the development of the data standard component of the DRS (for example, developing data reference tables, data format tables) • leading the DRS through additional consultations, as necessary	• leading the development of the policy instrument component of the DRS • providing policy alignment and ensuring consistency across DRS by reviewing and validating draft standards • ensuring that each DRS is developed and maintained in a consistent, transparent and collaborative manner • supporting the DRS steward with additional consultations
Endorsement	• leading the DRS through the endorsement and approval process of key governance bodies	• supporting the DRS steward through the endorsement and approval process of key governance bodies
Publication	• supporting communication and awareness efforts relating to the DRS	• leading the communication and publication efforts relating to the DRS
Maintenance	• reviewing and updating the data standard component, as necessary (see 3.5 Maintenance) • providing advice and supplementary guidance to departmental officials to support the implementation of the DRS	• reviewing and updating the DRS policy instrument component, as necessary • assisting the DRS steward with the development of supplementary materials to support implementation of the DRS • providing advice and supplementary guidance on DRS as policy instruments, including mediating any disputes related to DRS application

3. Data and metadata reference standard development process

► In this section

3.1 Preliminary review

The first phase in the development of a DRS is preliminary review. A new DRS can be proposed by any group in the GC, including but not limited to:

- working groups
- communities of practice
- governance committees
- chief data officers
- departmental officials

To begin the preliminary review phase, data and metadata standards can be submitted through the [DRS Intake Form](#). Submitting the form is the first step in the development of a DRS. Any GC employee or group can submit a standard; however, they may not be identified as the DRS steward and their involvement in the DRS process may end at the preliminary review phase if a more appropriate DRS steward is identified.

Before submitting a standard for preliminary review, it is recommended that the following questions are considered:

- What specific need or problem would the proposed standard address? Could this problem be better addressed by an existing DRS, by a domain standard for a select number of departments, or by a departmental standard?
- What is the intended scope and purpose of the proposed DRS? Is this standard fit for use across the GC?

- How will this standard support the strategic and open management of information and data?
- Does the standard align with key data management and governance principles (for example, the First Nations Principles of OCAP®, the FAIR principles, the CARE Principles for Indigenous Data Governance)?
- Is this standard being **adopted** from an existing standard, **adapted** from an existing standard, or is a new standard being **authored** to meet the needs of the GC on a given topic?
- Is your department the appropriate DRS steward, or does another department hold the appropriate mandate or subject matter expertise?
- What consultations of the existing standard have occurred or what consultations may need to be completed before the standard is published as a DRS? Have appropriate internal consultations been completed in your department (for example, with the departmental CDO)? For further considerations, see 4. Consultations for DRS.

Once a new standard has been proposed through the DRS Intake Form, a detailed review process begins, led by the DRS custodian. During this review process, the DRS custodian collaborates with relevant governance committees to review and validate the draft standard, as well as identify and confirm the appropriate DRS steward.

When identifying the appropriate DRS steward, the following factors are considered:

- Whether the DRS steward has the organizational/departmental mandate or recognized subject matter expertise on the topic of the DRS
 - For example, the steward of the Metadata Reference Standard for Digital Archival Records is Library and Archives Canada (LAC), who have the organizational mandate in the GC to provide advice related to archival records

- Whether the DRS steward is able to take responsibility for a data standard through its full life cycle, from development and approval, through long-term maintenance and rescission/replacement
- Other factors may be considered depending on the topic of the proposed DRS

For a list of standards already under consideration for publication as a DRS, visit the [DRS Standards Tracker](#) (accessible only on the GC network).

3.2 Development

Once the preliminary review process is complete, the DRS can be developed. The DRS steward and DRS custodian collaborate throughout the development process. This stage consists of two main steps:

1. development of the data standard component (which the DRS steward is responsible for)
2. development of the policy instrument component (which the DRS custodian is responsible for)

3.2.1 Development of the data standard component

This phase begins with the verification or development of the data standard (for example, data reference tables, data format tables) that will be used as the basis for the DRS. If an existing data standard is available (for example, a departmental standard that is being adopted as a DRS), it will be validated for government-wide use. If a new standard is being authored or an existing standard is being adapted for use by the GC (for example, an international standard), the data standard may go through a full development process.

During the data standard development process, it is recommended that DRS stewards work with the DRS custodian to:

- present the prospective data standard at the Chief Data Officer Council (CDOC) Sub-Committee on Data Standards and the Community of Practice on Data and Information (CPDI) Data Architecture and Reference Data Management (DARDM) working group, as necessary. For more information about these groups, see [About data and metadata reference standards](#)
- consider the development of a DARDM sub-working group to provide specific domain expertise. The sub-working group can also perform activities identified during the preliminary review (for example, additional coding that may be required, changes to the implementation strategy)
- develop a machine-readable version of the standard (for example, a CSV or JSON file, with a stable, versioned application programming interface (API)) that can be easily shared, if necessary
- define a review schedule for the DRS once published (for example, an annual review) and outline triggers for reviews outside of the planned schedule (for example, regulatory or technology changes)
- notify the DRS custodian once the data standard is complete to ensure the timely advancement of the DRS and effective communication between the two parties

3.2.2 Development of the policy instrument component

The next step of this phase includes the development of the policy instrument component for the DRS, which is managed by the DRS custodian. The DRS custodian is responsible for leading the creation of the policy instrument component, but the DRS steward and DRS custodian work together to define the details and requirements included in the final DRS policy instrument.

During the policy instrument development process, it is recommended that the DRS custodian works with the DRS steward to:

- ensure policy alignment and consistency with other published DRS and TBS policy instruments
- finalize the draft policy instrument and advise the DRS steward on projected timelines
- notify necessary groups that the policy instrument has been completed and draft any required briefing materials
- obtain all necessary internal approvals for the policy instrument before proceeding to internal governance committees for endorsement

3.2.3 Development of supplementary materials

If a need for supplementary materials is identified through the preliminary review or consultation process, it is recommended that the DRS steward, with the support of the DRS custodian, create advice and guidance documents for departmental use to support the implementation of the DRS. These tools may be published at the same time or shortly following the publication of the DRS itself.

3.3 Endorsement

When the development process is complete, prospective DRS undergo an endorsement and approval process through governance bodies (for example, the CDOC, the Assistant Deputy Minister Committee on Data and Information) before being brought forward to the CIO of Canada for approval and prescription of the DRS as a mandatory policy instrument. The DRS custodian supports the DRS steward throughout the endorsement process. For more information about the governance committees involved in the DRS process, see [About data and metadata reference standards](#).

3.4 Publication

Once a DRS is approved by the CIO of Canada, a new DRS is published on the Inventory of data and metadata reference standards on Canada.ca. The DRS custodian is responsible for coordinating the publication and communication of the new DRS, with the DRS steward supporting as necessary. The Community of Practice on Data and Information (accessible only on the GC network) is a primary communication channel for DRS updates.

3.5 Maintenance

After the standard's publication, the DRS steward is responsible for ongoing maintenance of the data standard component, including ensuring that it is up-to-date and accurate. The DRS custodian is responsible for the ongoing maintenance of the policy instrument component on Canada.ca.

After publishing a DRS, it is recommended that DRS stewards:

- review the DRS regularly to ensure that it remains current, accurate and relevant to the GC. How often a DRS should be reviewed depends on the topic of the standard, but it is recommended that DRS stewards publish their planned review schedule and review DRS at least every year
- develop procedures to identify when an update is necessary to the DRS. This procedure should identify whether the update applies to the policy instrument or the data standard component of the DRS. If unsure, the DRS steward can contact the DRS custodian to help assess what level of approval is required to make the change. See 3.5.1 Making changes to a DRS for more information about this process
- consider the impact of any proposed changes, including but not limited to:

- What is the goal or benefit of any update to the DRS?
- How will the change impact the implementation of the standard?
- How will stakeholders be impacted?
- Do stakeholders need to be consulted about this change?
- How will this change be communicated once it is completed?
- develop a method to track suggested or necessary updates to the standard. This may require establishing a working group or other committee of key stakeholders
 - For example, a working group of key stakeholders has been set up to share updates on GC organization names and related information in support of the DRS on Government of Canada Organization Names and Codes
- maintain a version history of the DRS to keep track of when changes have occurred, collaborating with the DRS custodian as necessary
- communicate major changes to the DRS as early and as widely as possible
- notify the DRS custodian of any changes to the DRS steward's contact information, either directly or through ServiceDigital-ServicesNumerique@tbs-sct.gc.ca
- where necessary, develop additional guidance or tools to support departments in implementing the DRS (for example, resources that explain how to implement the DRS in their systems)
- rescind the DRS once it is no longer relevant to the GC or cannot be actively maintained. This may occur because a new data standard has been developed to replace the DRS or changes in the environment (for example, technology, regulations) make the DRS unnecessary or outdated. DRS stewards will need to collaborate with the DRS custodian to formally rescind the DRS, in accordance with Treasury Board policy requirements

3.5.1 Making changes to a DRS

Making changes to the policy instrument component of a DRS

If the required update is in the policy instrument (for example, updating who the DRS applies to or how the standard is used), then the CIO of Canada must approve these changes, in accordance with the requirements of the Treasury Board policy suite. The DRS steward should work with the DRS custodian to make these changes.

Making changes to the data standard component of a DRS

If the required update is in the data standard component of the DRS (for example, updating reference data or a data format table), the DRS steward should determine where the main content of the data standard is published, as this will determine the necessary next steps.

- If the main content of the data standard is found in the **policy instrument** on Canada.ca, the CIO of Canada must approve these changes (see above), in accordance with Treasury Board policy authorities. The DRS steward should work with the DRS custodian to make these changes.
 - Example: In the DRS on the Business Number, the complete data format table is posted in Appendix A of the DRS on Canada.ca. This data format table is the **data standard component** of the DRS. In this case, the data standard component is posted in full in the policy instrument of the DRS. As a result, updates to this table count as changes to the policy instrument of the DRS and require approval from the CIO of Canada.
- If the changes do not affect the policy instrument and the content of the data standard is published on a **separate website** (for example, the Open Government Portal, departmental website, or other website), then the DRS steward can complete updates independently.

- Example: In the DRS on Government of Canada Organization Names and Codes, the reference data is linked in Appendix A of the DRS on Canada.ca. This reference data is the **data standard component** of the DRS. The full content of the data standard component of the DRS is found on the Open Government Portal and updates can be made independently by the DRS steward.
- Example: In the Metadata Reference Standard for Digital Archival Records, the **metadata standard** is referenced in the DRS, but the full metadata requirements are included on a separate page: the Operational Standard for Digital Archival Records' Metadata, which is managed by LAC. The DRS steward can update this metadata standard independently.

When changes are made to the data standard component of the DRS, it is recommended that these updates are communicated to the DRS custodian.

4. Consultations for DRS

Consultations are an essential part of developing and maintaining a policy instrument. Consultations may occur at different stages of the DRS process, and the structure of the consultation may depend on the subject matter of the DRS. The degree to which a DRS will need to be consulted is typically determined during the preliminary review phase of the DRS process, but additional consultations may be identified as necessary during the development or maintenance phase.

Consultations help ensure that:

- barriers to implementation and their corresponding solutions are identified
- key stakeholders have been sufficiently engaged throughout the critical phases of DRS development

- other relevant codes, values, formats and fields that are used elsewhere in the GC are identified (this is especially important if the data standard comes from a single department)

Consultations can either be narrow or broad in scope and accessible to all public servants in the GC. During the development of a DRS, it is the responsibility of both the DRS steward and DRS custodian to assess whether key stakeholders have been sufficiently engaged throughout the phases of development of the DRS.

If additional consultation is required for a DRS, it is recommended that the DRS steward and DRS custodian consider:

- Who will this DRS impact? For example, which communities, departments, or other groups will be affected by this DRS?
- Does this DRS address a complex issue or a high-profile topic? Will the DRS being published have implications for the general public?
- Is this DRS being adopted, adapted or authored?
- Has the data standard been previously consulted? If yes, who was previously consulted?
- Is the use of the data standard already widespread across the GC or are there other similar data standards that may be used in different departments?

Based on these considerations, the DRS custodian and DRS steward can determine an appropriate consultation plan. The consultation plan for a DRS may vary depending on factors like the goal for the consultation or what groups are being targeted. Possible consultation plans may include, but are not limited to, the following options:

- Completing an environmental scan of existing literature, standards and options

- Sharing concepts and drafts with stakeholders and obtaining their feedback
- Consulting targeted groups of stakeholders based on the subject matter of the DRS (for example, specific governance committees, interest groups or subject matter experts from across the GC)
- Engaging the information and data community within the GC (for example, the Community of Practice on Information and Data)
- Engaging the entire GC, with particular emphasis on critical stakeholders outside of the information and data community

5. References

This guidance should be read in conjunction with the following:

Policy instruments

- *Policy on Service and Digital*
- *Directive on Service and Digital*
- Data reference and metadata standards
- Standard for Managing Metadata
- Inventory of data and metadata reference standards
- Guidance on Prescribing Metadata Reference Standards
- Guidance on Data Quality
- Guidance on Assessing Readiness to Manage Data According to the Findable, Accessible, Interoperable and Reusable (FAIR) Principles

Additional information

- DRS Intake Form
- About data and metadata reference standards

6. Further information

Office of the Chief Information Officer

Treasury Board of Canada Secretariat

Email: ServiceDigital-ServicesNumerique@tbs-sct.gc.ca

The DRS custodian maintains an internal list of DRS steward contacts. All inquiries related to a specific DRS steward should be directed to:

ServiceDigital-ServicesNumerique@tbs-sct.gc.ca.

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