

RDA TESTING: WE CAME, WE LEARNED, WE CARRY ON

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METADATA & CATALOGING @ NCSU

- 18 Metadata & Cataloging staff
 - 6 in Monographs
 - 6 in Serials & Continuing Resources
 - 4 in Metadata & Data Quality
 - 1 Technology Support for Technical Services
- Highly centralized
- 2010-2011 cataloging output
 - 119,466 physical & electronic titles (MARC)
 - 33,131 physical volumes (MARC)
 - 5,767 digital image assets (non-MARC)
 - 550 linear feet of manuscript materials (non-MARC)
 - 3,142 faculty citations (non-MARC)

“RAPIDCAT” IN ACQUISITIONS @ NCSU

- NCSU uses YBP and WorldCat Cataloging Partners
- Quick copy-cataloging review upon receipt
- Checklist based on presence/absence of MARC tags
 - 050 or 090
 - 245 -- Author and title must match title page
 - 250 -- Matches what is on item
 - 650, 651, 600, 610, 611, 630 -- record has at least one of these tags
 - 300\$e -- has accompanying materials
 - etc.
- Our Acquisitions staff didn't really ever know AACR2!
- RDA orientation, not training

METADATA & CATALOGING @ NCSU

- Materials that *bounce out* from RapidCat (complex copy, variant editions, full originals)
- Materials that are not purchased (i.e. gifts, NCSU digital collections, librarian-selected websites)
- Materials that we do not buy title-by-title (i.e. e-journals, e-books, patron-driven)

METADATA & CATALOGING @ NCSU

- About 5% of NCSU MARC cataloging is Original
- Much of that is new editions and/or electronic derived from print
- NCSU is not a participant in the PCC
- MLS holding librarians are doing (next to) no cataloging
- Support staff are doing all copy AND original cataloging and both MARC and non-MARC cataloging

APPROACH TO TRAINING @ NCSU

- Involved all Metadata & Cataloging staff
- Established a training team
- Was not to be a debate about the merits of RDA
- Would not cover everything
- Was **need to know**
- When to know what to ask
- It **had** to succeed!

TRAINING THE TRAINERS

- Established a formal Training Team
- Library of Congress' Train the Tester session (for testing participants) at ALA Midwinter, January 2010
- Webinars, webinars, more webinars ...
- The RDA Training Team assembled other available resources, then **learned and muddled through as a group**, developing content while *simultaneously* learning the material
- Developed local policies & procedures

LOCAL POLICY DEVELOPMENT

- Policy setting v. use of catalogers judgment
- Alternatives/optional omissions/optional deletions
 - To follow LC or not to follow LC?
- Relationship designators
- Rule of 3
- Criteria for upgrading copy & Deriving records

TRAINING @ NCSU – CURRICULUM

- *RDA Changes from AACR2 for Texts*
(Barbara Tillett's webinar)
- FRBR
- RDA core training
- Breakout groups
- ALCTS webinars & ongoing discussion

APPROACH TO TRAINING @ NCSU – FRBR

- Hour-long session **before** the official start of RDA training
- Deliberately tailored the content to focus on the concepts needed to carry over into RDA training and then attempted to make those concepts more concrete

APPROACH TO TRAINING @ NCSU – FRBR

- What worked well?
 - Tailoring the content to need-to-know for RDA
 - Concrete examples & props
 - Focus on user tasks
 - Group discussion

APPROACH TO TRAINING @ NCSU – FRBR

- What worked less well?
 - FRBR is hard and needs to be reinforced throughout.
 - The “fun” FRBR philosophical debate is around resources published in multiple expressions/manifestations.
NCSU does not collect heavily in these areas.

RDA CORE TRAINING

- Differed from LC's training in two ways:
 - More intentionally taught RDA in terms of MARC21 and AACR2
 - Softened the presentation of RDA in its FRBR/FRAD-based conceptual framework.
- 12 hours of training over a 3 day period

RDA CORE TRAINING

Day One

- Introducing RDA
- Access Points
- Relationship Designators
- Preferred Title for the Work

Day Two

- Sources of Information
- Identifier for the Manifestation
- Title Proper and Statement of Responsibility
- Content, Media and Carrier Types
- Designation of the Edition
- Publication Statement and Copyright Date
- Extent, Illustrative Content (etc.) and Dimensions

Day Three

- Dates for Multipart Monographs, Serials and Integrating Resources
- Series Statement
- Numbering of Serials & Series
- Notes
- MARC Encoding for the US RDA Test
- Wrap-Up

NCSU DID NOT COVER

- Changes to types of materials we do not often collect:
 - Parts of the Bible
 - Rare books
 - Treaties
 - Music
- We also did not train in-depth on the new MARC Authority Record fields ... just enough to be able to read an RDA authority record

RDA CORE TRAINING

- What worked well?
 - Half-day sessions
 - Involving support staff in the content creation
 - Having more than one presenter
 - Starting with the harder stuff and leaving on a “high”
 - Having professional-looking Powerpoints & handouts
 - Having and sticking to an agenda
 - Investing in the planning
 - Discussion that ended in decision-making & follow-up
 - Snacks!

RDA CORE TRAINING

- What worked less well?
 - Easy to get derailed by the edge cases
 - Discussion that did not end in decision-making
 - Staff really want examples, examples, examples
 - We did not have enough examples
 - We did not show full records
 - The examples were not all contextual to our environment

NCSU U.S. RDA TEST STATISTICS

- Common set original: 25
- Common set copy:
 - met NCSU criteria for upgrade: 4
 - did not meet NCSU criteria for upgrade: 1
- Extra set: 462
 - MARC Original: 390 (includes 201 ETDs)
 - MARC Copy: 62
 - MODS: 10
- NCSU was the 5th highest record creator

IMPACT ON THE NCSU CATALOG THROUGH OCTOBER 2011

- RDA records in the NCSU database = 2,043
- NRC original cataloging = 1,720
- Records we changed from AACR2 to RDA, or they came in as RDA copy cataloging = 323
 - 288 have 040 \$d NRC

0.0963593% of the database!

IMPACT ON THE COMMUNITY THROUGH OCTOBER 2011

Number of Holdings	% of NRC Original
1	87.90%
2 to 10	9.33%
11 to 20	0.94%
21 to 30	0.47%
31-40	0.24%
41-50	0.06%
more than 50	1.12%

Thanks to Glenn Patton & OCLC staff for running this data!

NCSU TIMING ANALYSIS

Record creation times at the end of the test period:
15-40 minutes for original book cataloging
5-20 minutes for copy book cataloging

These times match NCSU's existing local data for AACR2 book record creation.

Average time per record decreased 40% by the end of the test.

75% of NCSU catalogers showed increased rapidity in record creation over the course of the test.

For books, ebooks and ejournals we noted a steady decrease in record creation time

The majority of print serials were cataloged by 3 individuals and despite repeat cataloging, time to catalog did not decrease much over time. **We have no idea why.**

NCSU SURVEY RESULTS

- Do you think that the US community should implement RDA?
 - NCSU Institutional Questionnaire: Yes
 - NCSU Individual Record Creator Surveys:
 - Yes: 6
 - Yes, with changes: 10
 - No: 0

*“Because this was my first RDA bibliographic record I checked everything I could find in the RDA toolkit. I learned a lot in training but not comfortable **yet**. I did a lot of **second guessing** my cataloger's judgment.” – NCSU cataloger*

“I ended up reviewing Adam Schiff's examples for conferences, and then used his reference to track down the RDA info I wanted to consult. I didn't have much luck going straight to the toolkit to find the area I needed.” – NCSU cataloger

*“I would also like to add that it is disappointing to see that the rules of RDA are expressed/explained in the Toolkit **no better than** they are in AACR2.” – NCSU cataloger*

*“Some of the changes between AACR2 and RDA make it difficult to catalog in both simultaneously. I spent an **unnecessary** amount of time tracking down a rule that I've followed without thinking for many years because I couldn't remember if the rule as I was remembering it was the old (AACR2) way or the new (RDA) way. In sorting this out, I believe I came to realize that my last record (RDA) had AACR2-inspired errors. Having individual testers using two sets of rules may affect the record times.” – NCSU cataloger*

“The relator codes are not as easy to apply as I thought they would be ... before actually creating a record, I had thought they would be straightforward and easy to assign. Not so much.”
– NCSU cataloger

“I think our local training was confusing regarding relator codes for distinguishing between a name (RDA 9.15) and relationship designators (Appendix I).” -- NCSU cataloger

“The resource was a distinctively titled, annual issue of a particular section of a newspaper. The Toolkit was not very helpful in this situation. I did a search on supplements but was more concerned with the MARC21 fields to use and the ISBD punctuation. I relied on my prior knowledge of CONSER standards for my approach to the cataloging of this resource. As for the RDA components of the cataloging, I tried to pay special attention to the transcription fields and the 3XX fields.” – NCSU cataloger

“Many of the rules for the handling of Conferences as serials were developed by CONSER and there should be some reference to what rules have been updated and which are still subject to CONSER description.” – NCSU cataloger

“I had difficulty determining what rules came into play when deciding on access points. I decided to include several names in the statement of responsibility for completeness sake, but I didn't feel that they merited access points. RDA training I received seemed to indicate that this was acceptable, and conferring with a co-worker yielded the same conclusion, but I was unable to find a clear reference in the toolkit stating what should and should not be considered for an access point. Perhaps this was because I tended to limit my searches to subjects relevant to what was being encoded (statement of responsibility), so perhaps this is stated explicitly somewhere in more general rules.” – NCSU cataloger

*“A little Latin never hurt anyone.” – NCSU
cataloger*

SO ... WHAT WE'VE LEARNED

- It is kind of cool to reset the training baseline
- It is easy to get bogged down by edge cases
- Unlearning is hard/Changing focus is hard
- Energy is a good thing **in and of itself**

- Our support staff consult AACR2 directly much less frequently than we would like to admit aloud.
- The distinctions between encoding standards & content standards is much less well understood than we would like to admit aloud.
- We catalog from examples.
- Staff have trouble distinguishing between the RDA rules and the RDA Toolkit.
- We have socio-cultural-political realities in our institutions.
- **We need to say these things aloud!**

WE WERE REMINDED THAT ...

- People like examples.
- Catalogers like rules.
- Catalogers like when expectations are clear and documentation is up to date.
- Support staff like when their bosses know the answers to their questions.
- Cataloging managers like when LC figures things out first.

CATALOGER'S JUDGMENT?

- Support staff liked the idea of cataloger's judgment, but ultimately did not feel comfortable exercising judgment.
- For efficiency, how much judgment do we actually want to encourage in copy-cataloging?
 - *trust other people's judgment!*

- “Cataloger’s judgment” needs something to be grounded in.
 - FRBR user tasks
 - We are all responsible for our metadata future
 - We are all responsible for the cost/value decisions in our libraries
- *Copy-catalogers may never have engaged in these issues before.*
- There are also some MARC coding implications for RDA options.

SUPPLYING A DATE OF PUBLICATION FOR SINGLE PART MONOGRAPHS

- RDA allows both:
 - 260 ## \$a Hoboken, N.J. : \$b Wiley,
\$c [date of publication not identified], ©2010.

and

- 260 ## \$a Hoboken, N.J. : \$b Wiley,
\$c [2010], ©2010.

WHAT NCSU IS DOING NOW

- We continue to catalog in RDA for new original cataloging and upgrade records to RDA when they meet the OCLC criteria for upgrade, still under most of our test policies.
- We are watching & following the PCC.
- We happily support the Transforming our Bibliographic Framework Initiative and the RDA report recommendation “Demonstrate credible progress towards a replacement for MARC”.
- NCSU Institutional Questionnaire:
<https://staff.lib.ncsu.edu/confluence/x/hQYsAQ>

DOCUMENTATION & RESOURCES

- NCSU:
 - <http://go.ncsu.edu/rda>
 - particularly: *NCSU RDA Training FAQ*
- University of Chicago:
 - <http://www.lib.uchicago.edu/staffweb/depts/cat/rda.html>
- Library of Congress
 - <http://www.loc.gov/aba/rda/>
 - <http://www.loc.gov/catdir/cpso/RDAtest/rdatest.html>
 - particularly: *RDA Changes from AACR2 for Texts* (Barbara Tillett)
- RDA-L
 - <http://www.rda-jsc.org/rdadiscuss.html>
- LChelp4rda@loc.gov
 - Email address to contact LC for questions about rules