



LIBRARY OF
CONGRESS



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Potomac Technical Processing Librarians
87th Annual Meeting

RDA or Not—Here We Come!

“U.S. RDA Test—Its Outcome and Next Steps”

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Library of Congress

RDA Test Completed

- October 1 – December 30, 2010
- 26 formal test partners, including LC, NAL, NLM
- Partners included a cross-section:
 - Diverse types and sizes of institutions
 - Libraries, consortia, educators, vendors
 - Describing different formats and content
 - Program for Cooperative Cataloging libraries

Why a Test?

- Report of LC Working Group on the Future of Bibliographic Control
 - Suspend work on RDA
- Were the JSC's goals for RDA being met?
 - General feasibility
 - Technical feasibility
 - Financial feasibility



Survey Instruments/number received

- 4 surveys with questions related to test sets—
 - Titles (original) that all cataloged (1200)
 - Titles (copy) that all cataloged (111)
 - Titles (original, particular to an institution) (5908)
 - Titles (copy, particular to an institution) (801)
- 4 additional surveys
 - Record creators (219)
 - Record users (163)
 - Institutions (29)
 - Informal testers (80)



RDA records collected

Sets	Bibliographic	Authority
Common original set	1,509	1,226
Common copy set	123	N/A
Extra set	7,786	10,184
Informal testers	1,148	1,390
Totals	10,566	12,800

Record Review

- Evaluated records in depth
- Compared AACR 2 and RDA records
- Possible only with Common Original Set:
 - Surrogates were available
 - Titles were cataloged using both rule sets



Findings: Record Review

- RDA and AACR2 records were equivalent in their consistency and error rate
- RDA errors tended to cluster around providing required access points for works and expressions manifested
- RDA record creators expressed concerns whether they had found all the applicable rules and interpreted them correctly



User survey

1. Does the RDA record meet your needs for the work you do?

Does not meet	Somewhat meets	Mostly meets	Fully meets
3.7%	11.1%	47.5%	37.7%

2. Which record do you believe is easier to understand?

AACR2	RDA	About the same	Don't know
14.1%	40.5%	41.7%	3.7%



Findings: Costs and Benefits

■ Costs

- Subscription to the RDA Toolkit
- Development of training materials
- Creation/revision of documentation
- Loss of production time during initial training and implementation
- Impacts to cataloging contracts



Findings: Costs and Benefits

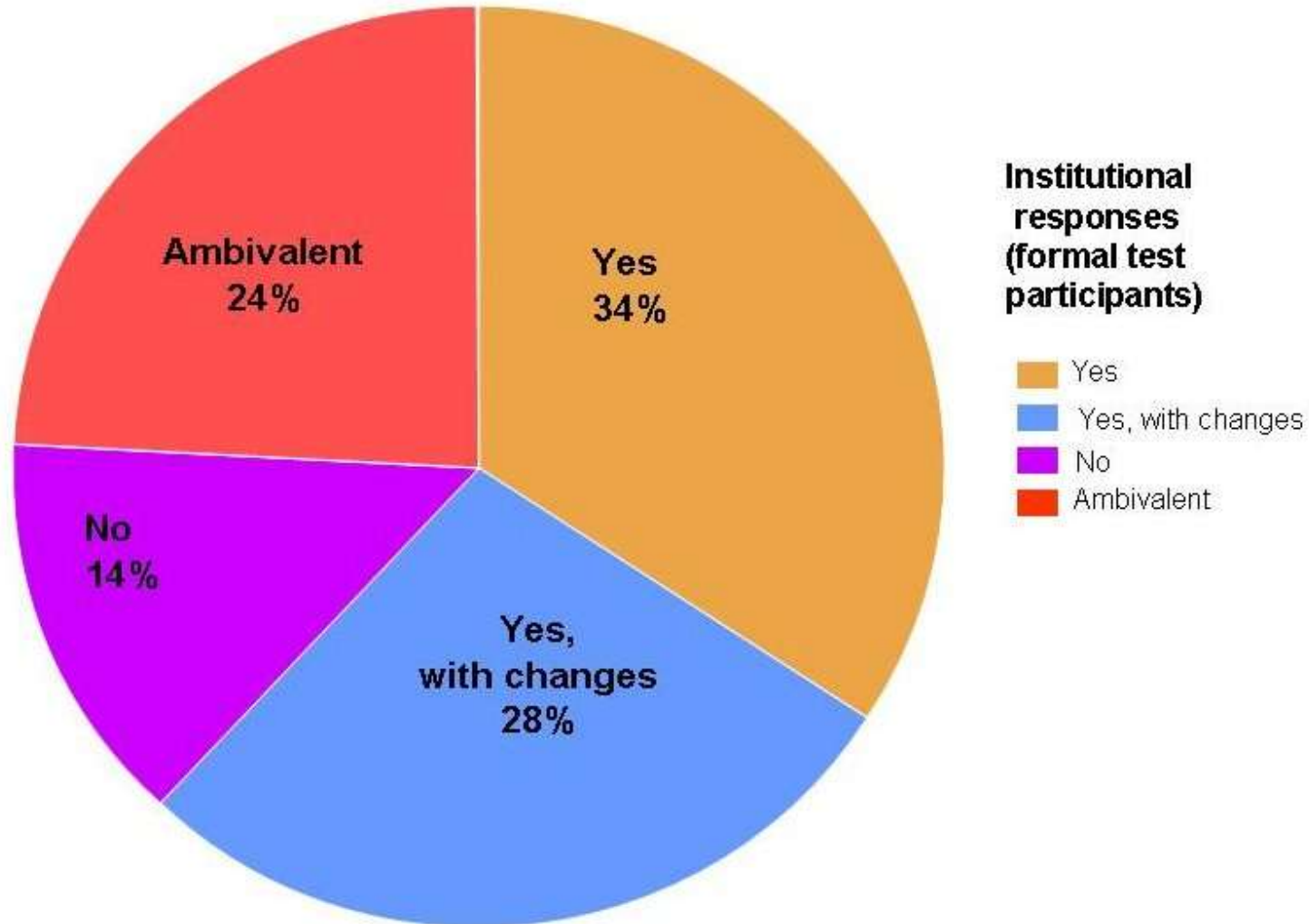
■ Benefits

- Change in how characteristics of things are identified
- Focus on user tasks
- New abilities to use and re-use bibliographic metadata
- Encouragement of new encoding schemas and better systems for resource discovery



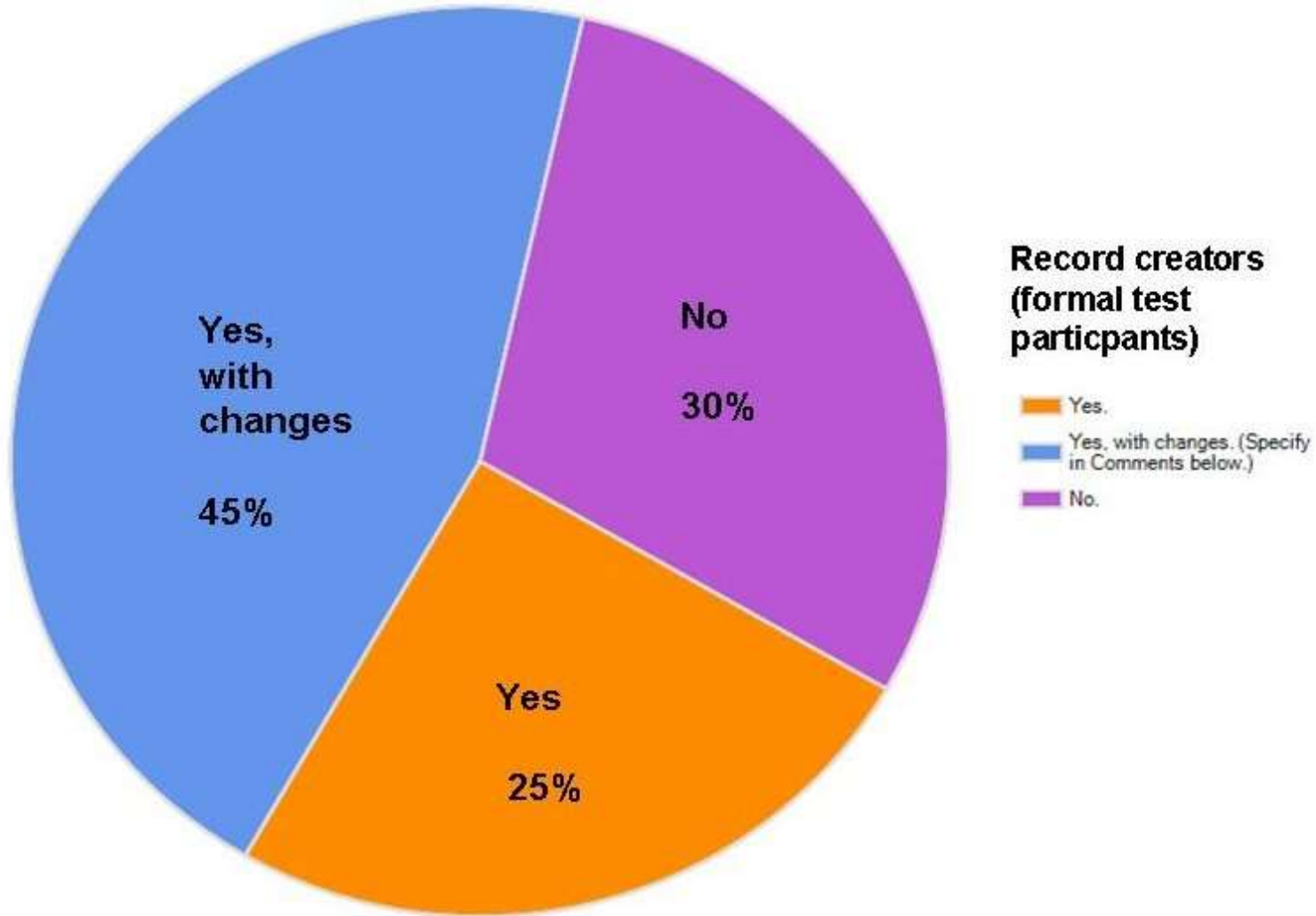
Key Survey Findings

Do you think that the U.S. community should implement RDA?



Key Survey Findings

Do you think that the U.S. community should implement RDA?



Decision

Contingent on the satisfactory progress/completion of the identified tasks and action items, the Coordinating Committee recommends that RDA should be implemented by LC, NAL, and NLM no sooner than January 2013.

The three national libraries should commit resources to ensure progress is made on these activities that will require significant effort from many in and beyond the library community.



Recommendations

- Recommendations to various communities
 - U.S. library community (including PCC)
 - Joint Steering Committee
 - Vendors
 - RDA Co-publishers



Recommendations to specific groups (& suggested completion timeframes)

- PCC has established task groups
 - RDA-Decisions-Needed Task Group
 - Task Group on AACR2 & RDA Acceptable Heading Categories
 - Task Group on Hybrid Bibliographic Records
 - PoCo Meeting November 3-4,
- Representatives from ISBD and ISSN will meet with the JSC at their Glasgow meeting (Nov. 2011) to work on harmonizing divergent practices, e.g., when to create new records
- Special format communities submitting proposals for changes to RDA instructions



Recommendations to specific groups (& suggested completion timeframes)

■ To Joint Steering Committee

- Rewrite (**i.e., reword**) of RDA in clear, plain English
 - Within 18 months

- Define process for RDA updating in the online environment
 - Within 3 months (JSC had already begun work on this issue)



Recommendations to specific groups (& suggested completion timeframes)

- “Re-wording:” 4 chapters have been identified; potential writers identified
- Clarification of the WEMI boundaries and differences in cataloging resources with various modes of issuance is being discussed
- JSC will work with ALA Publishing on enhancements to RDA Toolkit
- LC, PCC will work with JSC on topics such as new authority elements, issues relating to expressions, specialized communities, etc.



Recommendations to specific groups (& suggested completion timeframes)

- To ALA Publishing & Co-Publishers
 - Enhance and improve RDA Toolkit functionality and navigation
 - Within 3 months (ALA had already begun work on this issue)
 - Provide complete RDA record examples in MARC and other encoding schema
 - Within 6 months



Recommendations to specific groups (& suggested completion timeframes)

- To Library of Congress
 - Begin transition to a MARC replacement
 - Within 18 – 24 months
 - Involve the community in the process
 - Within 12 months
 - Lead and coordinate training
 - Within 18 months



Next Steps

- U.S. RDA Test Coordinating Committee
 - determine the plan for overseeing and monitoring the recommended changes and action items
 - issue communications plan to alert community to status of recommendations and action items



Next Steps

■ LC

- keep updated: “RDA Transition: Frequently Asked Questions”
- create a new web page to share information:
 - “Information and Resources in Preparation for **RDA: Resource Description and Access**”
- work and coordinate with PCC (Program for Cooperative Cataloging) regarding training and documentation



Next Steps

■ LC

- Set Timeline in Preparation for RDA: Resource Description and Access at the Library of Congress
 - **October 2011:** RDA catalogers/technicians (former LC testers) prepare for returning to RDA cataloging: classroom sessions and practice record discussions
 - **November 2011:** RDA catalogers/technicians return to creating RDA authority and bibliographic records
 - **November 2011:** LC distributes RDA authority/bib records
 - **Not sooner than July 2012:** LC begins to train remaining catalogers to apply RDA



Next Steps

■ NLM

- No plans to implement prior to 2013
- Starting to familiarize staff with FRBR concepts and terminology
 - Practical RDA training 3 months prior to implementation
 - Testers may begin producing RDA 4 months prior to implementation to assist with staff training
- Updating documentation for staff and contractors

■ NAL

- Monitoring progress of recommendations
- Preparing for coordinated implementation in 2013



Other national libraries

- British Library, Library & Archives Canada, National Library of Australia and LC
 - Reaffirmed coordinated implementation in 2013
- Germany
 - Implementation in 2013
- European RDA Interest Group
 - Launched September 2011



Ready for Implementation?: Systems

■ MARC Issues

- Has your ILS implemented all the MARC updates for the new RDA elements?

■ Indexes

- Will authorized access points containing relationship designators file properly with the headings lacking them?



Ready for Implementation?: Cataloging

■ Authorized access points

- If existing authorized access points are converted nationally to the RDA form, will you convert your records and how?
 - Authority records
 - Bibliographic records

■ Copy Cataloging

- Will you accept AACR2 copy or will you edit to partial or full RDA description?
- Will you convert authorized access points on AACR2 copy to the RDA form?



Ready for Implementation?: OPAC

- Display of content/media/carrier types
 - How will the new content/media/carrier types display in your local catalog?
 - Will they be displayed on brief as well as full record displays?
 - What alternative display options does your local catalog offer, such as icons or alternative text?
 - Can they co-exist with existing GMDs?



Available Documentation

- LC training materials from the test

- <http://www.loc.gov/catdir/cpso/RDAtest/rdatraining.html>

- RDA Toolkit Training

- <http://www.rdatoolkit.org/training>

- ALCTS RDA Webinars

- <http://www.ala.org/ala/mgrps/divs/alcts/confevents/upcoming/webinar/cat/rda.cfm>



Additional Information

- Final Report and Recommendations
 - <http://www.loc.gov/bibliographic-future/rda/>
- LC RDA planning
 - <http://www.loc.gov/aba/rda/>
- MARC Transition website
 - <http://www.loc.gov/marc/transition/>
- RDA Toolkit
 - <http://www.rdatoolkit.org/>
- Regular updates from Committee



Thank you

- Thank you!
- Questions
- Beacher Wiggins, Director for Acquisitions & Bibliographic Access (bwig@loc.gov)

