Moving Ahead With RDA

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BCLA CONFERENCE

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The story so far...

- **2003** Editor of AACR3 announced
- **2005** RDA : Resource Description and Access Announced as new title for AACR3
- **2008** RDA full draft released for constituency review
- **2010** June - RDA is published!
- **2010** July – December RDA formal test period
- **2011** Time to move ahead with RDA
http://www.rdatoolkit.org
Why RDA?

- Need to transform our stand-alone library catalogues into open repositories of data which expose data about information resources
  - Required a re-examination of logical structure of ACCR2
- Need to move away from the creation of a self-contained description of a single resource presented on a card or in a record
  - Develop standard that defines the attributes of a resource to be described in discrete ‘elements,’ so that those elements can be gathered together in various ways for various uses
Goals of RDA

- **Extensible**
  - RDA design should allow it to be easily extended to accommodate new requirements for description

- **Flexible**
  - RDA is designed to take advantage of efficiencies and flexibility in data capture, storage, retrieval and display
  - That is – it should allow RDA created descriptions to be displayed to the user in a variety of presentations and to be accessed using a wide range of search tools

- **Interoperable**
  - Should be compatible with legacy technologies but also ready for use by emerging formats in a web-friendly environment
Foundations of RDA

- Functional Requirements for Bibliographic Records an Entity – Relationship Model
- Statement of International Cataloguing Principles
  - Differentiation, sufficiency, relationships, representation, accuracy, attributions, language preference, common usage or practice, uniformity
  - “principles” not “rule by example”
- Core Elements
  - Guided by FRBR/FRAD “high value” elements to support user tasks, ISBD mandatory elements
RDA Principles  0.4.3

- **Differentiation**
  - The data describing a resource should differentiate that resource from other resources.

- **Sufficiency**
  - The data describing a resource should be sufficient to meet the needs of the user with respect to selection of an appropriate resource.

- **Relationships**
  - The data describing a resource should indicate significant relationships between the resource described and other resources.

- **Representation**
  - The data describing a resource should reflect the resource’s representation of itself.

- **Common Usage or Practice**
  - Data that is not transcribed from the resource itself should reflect common usage in the language and script preferred by the agency creating the data.
RDA Principles

0.0 Data created using RDA to describe a resource are designed to assist users with the following tasks:

- Find
- Identify
- Select
- Obtain
RDA Key Features

- Language
  - No longer the language of the library’s 20\textsuperscript{th} century card cataloguing environment
  - FRBR terminology
  - Computing terminology – element, attribute, relationship

- Data
  - Data should function independently of the format, medium, or system used to store or communicate the data
  - Data should be amenable to integration into existing databases
FRBR Projects Which Illustrate RDA Goals

- **OLAC Work-Centric Moving Image Discovery Interface Prototype**
  

- **Open Library**  [www.openlibrary.org](http://www.openlibrary.org)
  - Goal is one webpage for every book, Every item assigned a URI
  - Links from book information to other information of value to users

- **AUSTLit**  [www.austlit.edu.au](http://www.austlit.edu.au)

- **Chronicling America Project**
  - Linked data using Dublin Core, Bibliographic Ontology, FOAF and Object Reuse and Exchange (OAI-ORE)
  - [http://chroniclingamerica.loc.gov/about/api/](http://chroniclingamerica.loc.gov/about/api/)
SO WHEN DO WE START?
Testing RDA

- U.S. Libraries have undergone a period of formally testing RDA
  - LC, NAL, NLM
  - 25 other test partner libraries also tested
  - OCLC’s Contract Cataloging participated in test
- Testing phase was from June 2010 to March 2011
  - Oct – Dec - creating of test records
  - Jan – March – evaluation of results
  - Awaiting the report of findings
Did not participate in the formal test phase

Reviewing LC’s policy on core elements and developing a common position with BAnQ

Have added new MARC codes to AMICUS but have not yet altered displays and indexing

Will share training materials with wider library community

French translation is underway

May implement in November 2011
RDA Around the World

U.S.A., Australia, Britain and Canada have agreed on a coordinated implementation of RDA.

- Australia: no decision on timing will come until after consideration of LC’s report from the testing. Not anticipated before 2nd quarter 2012!
- United Kingdom: British Library implementation decision will be informed by Library of Congress decision
- Europe – several countries seriously considering adoption of RDA, France and Germany in process of translating
Testing RDA

Goals of the test

- To determine whether RDA Online in its initial release offers sufficient benefit, compared to current methods, to achieve the objectives stated for the proposed new cataloging code.
- Based on the analysis of the test results, and considering the cost of implementation, the three US national libraries will determine whether to implement the initial release of RDA.

Test methodology

- All test partners catalogue same 25 items = common set
  - Once in RDA and once in AACR2, each by a different cataloguer.
- All cataloguers complete questionnaire following each item catalogued providing information on time required, how easy to understand RDA instructions, changes in workflow needed, etc.
Testing RDA

- Test involved creation of a common set of records by all participants, supplemented by additional records
- Number of RDA records created during test
  - 7,000 bibliographic records
  - 12,000 authority records
- These records are available for all to study
- RDA Test Record Downloads
  http://www.loc.gov/catdir/cpso/RDAtest/rdatestrecords.html
Report of the Test Findings

- Report to senior managers of US national libraries to be submitted May 6

- LC  Decision to implement or not will be announced in June
Advance Reports from Test Libraries

- At ALA Midwinter a number of test libraries reported on their experiences:
  - University of Chicago
  - Brigham Young University
  - North Carolina State University
  - Stanford University
  - Sterling and Francine Clark Art Institute Library
  - San Antonio Texas School District
What did the testing reveal?

DESCRIPTION

- Strong tension between application of cataloguers’ judgment and the desire for consistency
- No Rule of Three required a lot more time, but at the same time many had already departed from this AACR2 restriction
- Spelling out words not a burden, pleased to get rid of abbreviations
- Many felt copyright should not be in same field as publication date
What Did the Testing Reveal?

- Testers liked freedom to add more information to authority records
- Issues arose when distinguishing between field of activity and occupation
- Users like relators for persons but did not care about corporate relators
- Reluctance to convert established AACR2 headings to RDA forms – desire to grandfather
### What Did the Testing Reveal

<table>
<thead>
<tr>
<th>RDA Toolkit – the good</th>
<th>RDA Toolkit – the bad</th>
</tr>
</thead>
<tbody>
<tr>
<td>• AACR2 to RDA link helpful</td>
<td>• Not enough examples</td>
</tr>
<tr>
<td>• Workflows have potential to aid in training and streamlining</td>
<td>• Rules not ordered with respect to workflow</td>
</tr>
<tr>
<td>• Links to other resources valuable</td>
<td>• Search and navigation poor</td>
</tr>
<tr>
<td>• RDA Element set useful</td>
<td>• Difficult to be sure you have found all relevant rules</td>
</tr>
</tbody>
</table>
What the Test Records Reveal

- Evident from common record set that application of RDA can result in many different records for a given resource
- Recording relationships for works and expressions is optional resulting in wide variance in amount of detail provided about a resource
- New forms of headings may have been stored in authority records but not bib records
  - Looking at bibliographic test records does not yet reveal the full impact of RDA changes
What did testing libraries conclude?

- **University of Chicago**
  - Unanimous decision to continue cataloguing in RDA rather than wait for decision of national libraries
  - “It’ll be all right, really it will.”

- **North Carolina State University**
  - Supports RDA implementation. New rules will improve success of FRBR user tasks.

- **San Antonio Texas School District**
  - “we can do it” ; willing to move forward with RDA

- **Of Note**: Diane Hillman, a vocal RDA critic, was recently heard advocating for RDA. “It is ready.”
ILS Vendor Action on RDA

• ExLibris Voyageur
  o Have issued a new generic MARC table
  o Customers must then update tag tables, displays, indexing

• Innovative
  o Users can load an upgrade which incorporates MARC21 changes
  o Free service to help customers modify fields and displays

• SirsiDynix
  o Session at upcoming user group conference will show customers how to change format policies to accommodate MARC21 changes
  o Waiting for decision from national libraries before proceeding with further development

• Evergreen — updated tag and subfield tooltip can be downloaded
VTLS Virtua

- Early implementer of FRBR
- Virtua has had FRBR database since 2003
- May be first to demonstrate value of RDA changes
- Have added links from VTLS client to RDAToolkit
- Envision a national database of work and expression records that we can all use, just adding manifestation details
- RDA Sandbox – for $65 dollars you can sign up to play with FRBR record structures
Going forward

- WE WILL BE OPERATING IN A MIXED ENVIRONMENT FOR SOME TIME

- WE WILL NEED TO PRESS ILS VENDORS FOR INNOVATIVE IMPLEMENTATIONS OF THE FRBR MODEL AND RDA LINKING RELATIONSHIPS

- WE MAY NEED LOCAL POLICIES SURROUNDING THE RDA ALTERNATIVES AND OPTIONS FOR ADDITION OR OMISSION
Looking at RDA Bibliographic Records

- RDA Test Record Sets

- Library of Congress catalog
  - Search using Expert/Command search
    - 040e rda

- OCLC Connexion search
  - dx: rda (dx descriptive conventions)

- University of Chicago

- University of BC
  - kw rdacontent
Mitchell, South Dakota, welcomes you: the world’s only Corn Palace.

Scale approximately 1:25,000.

Mitchell, SD: Mitchell Convention-Visitors Bureau: Mitchell Area Chamber of Commerce, [2000?]

1 map: color; 50 x 26 cm, folded to 22 x 11 cm

Cartographic image

Title from panel.

On title panel: "Free attraction."

Includes numbered points of interest, street index, and advertisements.

Color illustrations, brief history of the Corn Palace, community information, and advertisements on verso.

Mitchell (S.D.) Maps.

Corn Palace (Mitchell, S.D.) History.

Maps.
LC control no.: 2010586677
LCCN permalink: http://lccn.loc.gov/2010586677
Type of material: Cartographic Material
Main title: Mitchell, South Dakota, welcomes you : world's only Corn Palace.
Published/Created: Mitchell, SD : Mitchell Convention-Visitors Bureau : Mitchell Area Chamber of Commerce, [2000?]
Description: 1 map : color ; 50 x 26 cm, folded to 22 x 11 cm
Scale info: Scale approximately 1:25,000.
Notes: Title from panel.
On title panel: "Free attraction."
Includes numbered points of interest, street index, and advertisements.
Color illustrations, brief history of the Corn Palace, community information, and advertisements on verso.
Subjects: Corn Palace (Mitchell, S.D.) --History.
Mitchell (S.D.) --Maps.
Form/Genre: Maps.
Geographic class no.: 4184 M6
Geographic area code: n-us-sd
Content type: cartographic image
Media type: unmediated
Carrier type: sheet
Local Adopters?

- University of British Columbia Library
  - In-house training has taken place
  - Have created a small number of original records using RDA
  - Find them by searching their cataloguing using kw ‘rdaccontent’
  - Have not altered non-MARC displays, will be consulting with public services
  - Have not displayed 336-337-338, indexed in general keyword
  - Are displaying relationship terms
Bibliographic Record Display

Title: Two lovers on a bench : an extract from the opera Einstein on the beach / by Samuel M. Johnson ; with an etching by Mariko Ando.

Main Author: Johnson, Samuel M. author

Other Author(s): Ando, Mariko, illustrator

Libretto for (work) Glass, Philip. Einstein on the beach. Knee play, no. 5.

Published:[Vancouver] : HM, MMIX.
The following slides show examples from test record set which illustrate some of the key changes from AACR2
A tramp abroad, Following the equator, other travels / Mark Twain ; Roy Blount, Jr., editor.


1145 pages : illustrations ; 21 cm

unmediated

volume

Blount, Roy, Jr., editor.

Contains (work): Mark Twain. Tramp abroad.

Contains (work): Mark Twain. Following the equator.
Rattletrap (Musical group)

New Hampshire : Rattletrap, ©2003

1 sound disc : digital ; 4 3/4 in

Performed music

Audio

Audio disc

Title from CD case

1. Movin-on.
2. Change.
3. Devil.
4. Pepper grind.
5. Rainy-day

Tom Matthews, vocals ; Jeremy Dominick, guitar ; Jim Chabot, bass ; Grant Houle, drums

All songs written and produced by Rattletrap at Dizzyland Recording, Inc. [Rochester, New Hampshire]

Mathews, Tom, singer
Dominick, Jeremy, instrumentalist
Chabot, Jim, instrumentalist
Houle, Grant, instrumentalist

Dizzyland Recording, recording studio
March of the penguins.


1 videodisc : sound, color ; 4 3/4 in.

Two-dimensional moving image.
ELECTRONIC RESOURCE

=100 1\$aFitzgerald, Francis Scott,$d1896-1940,$eauthor.
=245 14\$aThe curious case of Benjamin Button /$cby Francis Scott Fitzgerald.
=260 \$a[Place of publication not given] :$bProject Gutenberg :$bfeedbooks [distributor],$c[2004]
=300 \$a1 online resource (9,129 words)
=336 \$atext$2rdaccontent
=337 \$acomputer$2rdamedia
=338 \$aonline resource$2rdacarrier
=500 \$aAvailable in EPUB, Kindle, PDF and custom PDF formats.
=500 \$aAvailable from Project Gutenberg through feedbooks.
=500 \$a"Source: http://www.gutenberg.org."
=533 \$aElectronic reproduction.
=538 \$aMode of access: World Wide Web.
=500 \$a"Release date Oct. 1, 2004"--Project Gutenberg bibliographic record page for Tales of the jazz age.
=773 0\$aContained in (work) : Fitzgerald, Francis Scott,1896-1904,author.$tTales of the jazz age,$d1922.
=856 40\$uhttp://www.feedbooks.com/book/3431
=985 \$acommonsetI$bICU
=994 \$aC0$bDLC
Checklist for Local Adopters

- Update MARC 21 formats in ILS
- Decide on display and indexing of new fields
- Decide on any changes to RDA Core element set
- Decide on RDA alternatives and options
- Decide on handling of authority record creation and authority processing options
- Decide on how to handle AACR2 records
- Train staff on FRBR model
- Train staff on RDA
Training Best Practices

- Understanding of FRBR is key to understanding and applying RDA
- Focus on materials common to your environment first
- Pull out key changes from AACR2 to RDA
- Balance theory and practice
- Be prepared with lots of examples
- Module 9 of the LC Train-the-Trainer webcasts

Twelve Key Concepts & Changes in RDA
Training Materials Available Now

FRBR Things you should know, but were afraid to ask
http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4554

LC Training Materials for the RDA Test
http://www.loc.gov/catdir/cpso/RDAtest/rdatraining.html

LC Recorded Train-the-trainer Webinars
http://www.loc.gov/bibliographic-future/rda/trainthetrainer.html

CLA-Technical Services Interest Group (TSIG) Wiki
http://rdaincanada.wikispaces.com/presentations
Training Materials Now Available

NCSU Training documentation
https://staff.lib.ncsu.edu/confluence/display/MNC/RDA+Test#RDATest-NCSURDADocumentation

ALA ALCTS Ahead to RDA webinar series
http://www.ala.org/ala/mgrps/divs/alcts/confevents/upcoming/webinar/cat/rda.cfm

JSC presentations site
http://www.rda-jsc.org/rdapresentations.html
Resources

**MARC21 Summary of Additions**
http://www.loc.gov/marc/RDAinMARC29.html

**Term and Code List for RDA Content Types**
http://www.loc.gov/standards/valuelist/rdacontent.html

**OCLC Technical Bulletin #258**
http://www.oclc.org/support/documentation/worldcat/tb/258/default.htm

**Where is it in RDA?**
http://www.loc.gov/catdir/cpso/RDAtest/whereisit.doc

**RDA Alternatives and Options – LC practice for test**
http://www.loc.gov/catdir/cpso/RDAtest/RDA_alternatives.doc
RDA

READY

SET

GO!