Moving Ahead With RDA

APRIL 8, 2011

BCLA CONFERENCE

LINDA WOODCOCK

(KWANTLEN POLYTECHNIC UNIVERSITY)

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
  - 0.1 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 20th 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**

  http://blazing-sunset-24.heroku.com/page/about

- **Open Library** 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** Australian literary, print, narrative culture
  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/

RDA

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

Library and Archives Canada

- 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?

HEADINGS

- 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

RDA Toolkit – the good

- AACR2 to RDA link helpful
- Workflows have potential to aid in training and streamlining
- Links to other resources valuable
- RDA Element set useful

RDA Toolkit – the bad

- Not enough examples
- Rules not ordered with respect to workflow
- Search and navigation poor
- Difficult to be sure you have found all relevant rules

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
  - Have issued a new generic MARC table
  - Customers must then update tag tables, displays, indexing
- ## Innovative
  - Users can load an upgrade which incorporates MARC21 changes
  - Free service to help customers modify fields and displays
- ## SirsiDynix
  - Session at upcoming user group conference will show customers how to change format policies to accommodate MARC21 changes
  - 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
  - http://www.loc.gov/catdir/cpso/RDAtest/rdatestrecords.html
- Library of Congress catalog
  - Search using Expert/Command search
    - 040e rda
- OCLC Connexion search
  - dx: rda   (dx descriptive conventions)
- University of Chicago
  http://www.lib.uchicago.edu/staffweb/depts/cat/rda/rdaexamples.pdf
- University of BC
  - kw rdacontent

RDA Record from LC Catalog

000 01270cem a2200337 i 450
001 16578460
005 20101215161320.0
007 aj canzn
008 101214s2000 sdu a 1 eng
906 __ |a 7 |b cbc |c orignew |d u |e ncip |f 20 |g y-geogmaps
955 __ |a ga35 2010-12-14 sent to CMT
010 __ |a 2010586677
034 1_ |a a |b 25000
040 __ |a DLC |b eng |c DLC |e rda |d DLC
043 __ |a n-us-sd
050 00 |a G4184.M6 2000 |b .M5
052 __ |a 4184 |b M6
245 00 |a Mitchell, South Dakota, welcomes you- : |b world's only Corn Palace.
255 __ |a Scale approximately 1:25,000.
260 __ |a Mitchell, SD : |b Mitchell Convention-Visitors Bureau : |b Mitchell Area Chamber of Commerce, |c [2000?]
300 __ |a 1 map : |b color ; |c 50 x 26 cm, folded to 22 x 11 cm
336 __ |a cartographic image |2 rdacontent
337 __ |a unmediated |2 rdamedia
338 __ |a sheet |2 rdacarrier
500 __ |a Title from panel.
500 __ |a On title panel: "Free attraction."
500 __ |a Includes numbered points of interest, street index, and advertisements.
500 __ |a Color illustrations, brief history of the Corn Palace, community information, and advertisements on verso.
651 _0 |a Mitchell (S.D.) |v Maps.
610 20 |a Corn Palace (Mitchell, S.D.) |x History.
655 _0 |a Maps.

RDA Record From LC Catalog

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.

LC classification: G4184.M6 2000 .M5

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 'rdacontent'
  - 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

An example from UBC's Catalogue

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.

RDA Test Record Examples

The following slides show examples from test record set which illustrate some of the key changes from AACR2

```
=LDR  01004nam a2200313li 4500
=001  ocn669167862
=003  OCoLC                              TEXT
=005  20110113033851.0
=008  101008s2010\\\\nyua\\\\\\\\\\000\0\eng\d
=010  \\$a  2009937080
=040  \\$aCGU$beng$cCGU$erda
=020  \\$a9781598530667
=020  \\$a1598530666
=035  \\$a(OCoLC)669167862
=079  \\$aocn664723769
=049  \\$aDLCC
=100  1\$aTwain, Mark,$eauthor.
=240  10$aTravel writings.$kSelections
=245  12$aA tramp abroad, Following the equator, other travels /$cMark Twain ; Roy
Blount, Jr., editor.
=260  \\$aNew York :$bLibrary of America,$c[2010], ©2010.
=300  \\$a1145 pages :$billustrations ;$c21 cm
=336  \\$atext$2rdacontent
=337  \\$aunmediated$2rdamedia
=338  \\$avolume$2rdacarrier
=700  1\$aBlount, Roy,$cJr.,$eeditor.
=700  12$iContains (work):$aTwain, Mark.$tTramp abroad.
=700  12$iContains (work):$aTwain, Mark.$tFollowing the equator.
```

=110 2\\$aRattletrap (Musical group)
=245 10$aRattletrap
=260 \\\\$a[New Hampshire] :$bRattletrap,$c[2003], ©2003
=300 \\\\$a1 sound disc :$bdigital ;$c4 3/4 in
=336 \\\\$aperformed music$2rdacontent
=337 \\\\$aaudio$2rdamedia
=338 \\\\$aaudio disc$2rdacarrier
=500 \\\\$aTitle from CD case
=505 0\\$a1. Movin-on. -- 2. Change. -- 3. Devil. -- 4. Pepper grind. -- 5. Rainy-day
=511 0\\$aTom Matthews, vocals ; Jeremy Dominick, guitar ; Jim Chabot, bass ; Grant Houle, drums
=518 \\\\$a"All songs written and produced by Rattletrap at Dizzyland Recording, Inc. [Rochester, New Hampshire]"--Back of CD case
=700 1\\$aMathews, Tom,$esinger
=700 1\\$aDominick, Jeremy,$einstrumentalist
=700 1\\$aChabot, Jim,$einstrumentalist
=700 1\\$aHoule, Grant,$einstrumentalist
=710 2\\$aDizzyland Recording,$erecording studio

=LDR 02560ngm a2200493Ki 4500

VIDEO DVD

=001 ocn697800462
=003 OCoLC
=005 20110201055509.0
=007 vd\csaizq
=008 110121s2007\\\\cau080\\\\\\\\\\\\\vleng\d
=040 \\$aOCLCQ$beng$erda$cQBX$dOCLCQ$dUTV
=020 \\$a9781419850578
=020 \\$a1419850571
=024 1\$a085391145530
=028 42$a114553$bWarner Bros.
=035 \\$a(OCoLC)697800462
=041 0\$aeng$aspa$jeng$jspa
=079 \\$aocn664731803
=245 00$aMarch of the penguins.
=260 \\$aBurbank, CA :$bDistributed by Warner Home Video,$c[2007], copyright 2007.
=300 \\$a1 videodisc :$bsound, color ;$c4 3/4 in.
=336 \\$atwo-dimensional moving image$2rdacontent
=337 \\$avideo$2rdamedia
=338 \\$avideodisc$2rdacarrier

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$2rdacontent

=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-NCSURDATrainingDocumentation

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!