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RDA: Resource Description and Access

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In June 2010 Anglo American Cataloguing Rules (AACR), [1] the cataloguing standard in use for the last thirty years, will be replaced by Resource Description and Access (RDA) [2]. As the biggest change in bibliographic standards since the adoption of MARC21 ten years ago, the new rules have inspired much discussion in the cataloguing community and beyond. This briefing, organised by CILIP, aimed to provide an overview of the new standard as well as addressing the impact on librarians and libraries.

Anne Welsh, Lecturer in Library and Information Studies at University College London, chaired the day.

The Why, What, How and When of RDA: The Current State of Play

Ann Chapman, Research Officer UKOLN and Chair of the CILIP-BL Committee on RDA

Ann took us through an overview of AACR from its beginnings in 1967 up to 2005 when the decision was made to develop RDA due to the negative feedback received on the initial draft of AACR3. In recent years AACR has become increasingly complex to use due to the explosion of new formats and content being held in libraries. Its Anglo-centric viewpoint has often been cited as a barrier in the growing international environment and as a standard written prior to the Functional Requirements for Bibliographic Records (FRBR) [3] it does not take account of many of the principles on which we now base information retrieval.

Much of AACR has of course been very successful and Ann noted that many of the key principles would still be valid in RDA, while other rules would still be appropriate but would need re-wording. RDA itself will be more easily applicable to an online networked environment and will provide effective bibliographic control for all types of media, including future formats. As it is compatible with other similar standards, it will be useful to communities beyond the library and will be structured on internationally agreed principles. A particular focus will be the recording of relationships: between works, expressions, manifestations and items; between persons, families and corporate bodies; and between concepts, objects, events and places.

RDA will be launched as an online product with text linking and functionality supporting the creation of bookmarking and workflows, both institutional and personal. So what does it all mean for cataloguing managers? Overall RDA should enable cataloguers to put better data into OPACS which will then result in better search and display options for users. Therefore, Ann concluded, RDA presented us with multiple opportunities to be embraced.

Introduction to Resource Description and Access: Cataloguing and Classification in the Digital Era

Exclusive video presentation by Shawne D Miksa, Associate Professor, Department of Library and Information Sciences, University of North Texas

Shawne discussed the relationship of RDA to the fundamental principles of bibliographic control. Information must be organised to support access and retrieval. In the digital age, when users expect to find information through Internet search engines, what is the role of libraries and their catalogues? Cataloguers must do more than simply describe an item, they must become in Shawne's words 'the translators, or interpreters'. In the past, librarians have helped users to interpret search results; but now users frequently search the catalogue alone, often remotely, and so the catalogue record is often the only connection between the user and a librarian.

Cataloguers must understand how the structure of the catalogue records they create enable users to accomplish certain tasks. FRBR and FRAD (Functional Requirements for Authority Data) define entity relationships and user tasks and these concepts form the foundation of RDA. It is not a change in the rules of cataloguing but uses the principles of cataloguing to broaden the scope of what we can catalogue and enrich the connection between users and resources.

Transition to RDA: A BL Perspective

Alan Danskin, Manager of Data Quality, The British Library

Alan began by considering why we need a new set of cataloguing rules. When Antonio Panizzi, Chief Librarian of the British Museum, laid down his cataloguing rules in 1841 he was dealing with an entirely print environment, where access points had to be limited to reduce expense, and where material was being catalogued for an audience who would be highly educated. Those rules laid the foundations for AACR, yet today library catalogues are accessed by a far more diverse community, with different expectations, and without the technological constraints of Panizzi's day.

RDA will be more extensible with principles-based instructions encouraging the cataloguer to make judgements rather than legislating for every possible case. The clearly defined element set of RDA will allow improved granularity and improved mapping to other schema such as Dublin Core while the greater emphasis on relationships will allow better navigation and displays making catalogues more user-focused.

RDA will be published in June 2010 and access will be free from publication until the end of August 2010. The US already has a big testing exercise underway [4] but the UK, Canada and Australia will not be carrying out such a formalised process. Instead National Libraries will be testing and feeding back to the rest of the community. Alan highlighted that one thing the BL would be looking at during testing would be workflows. Having established an efficient workflow using AACR, this is something the Library will not want to put at risk; so careful consideration about whether to implement RDA would be needed if it cannot be used as efficiently as AACR2 (though obviously it will take time for cataloguers to adjust).

UK prices for RDA have not yet been announced, though US prices are available and it is likely that UK prices will be based on them (taking into account exchange rates and different tax regimes). The concept of RDA as a free product has been considered, but this was rejected by the publishers who have paid for the development process and who will need income to sustain the standard. Pricing for the UK will be available from the email address rdatoolkit@ala.org in due course. It is the publishers, rather than the Joint Steering Committee (JSC), who will decide on the pricing structure.

In terms of local system configuration there will be changes to make: to indexing, value lists, templates, validation, macros and to import/export profiles. RDA records will be able to co-habit in the same system as older records but will be identified by an RDA flag in 040 \$e and by a code in the Leader field. Changes have been made to MARC21 to enable it to work more effectively with RDA. [5]

Few changes will be necessary to legacy data, though there are a few exceptions to this. General material designations (which can be broken into carrier types by a global change), the recording of Biblical headings and the elimination of abbreviations (which are likely to be corrected in a NACO file and redistributed by the Library of Congress (LC)). Obviously the more updates we make to existing data, the greater the benefits to users; but on the whole, these advantages will be seen as systems evolve and as records are enriched over time.

The BL plans to start testing RDA when the online product is published. This will include implementation with Aleph, MARC21 changes, workflow testing, scenario evaluation (such as how to proceed if the Library of Congress does not implement RDA), creation of, and

exchange of test data.

This will then be used to inform training requirements for the UK, which will be rolled out through the BL, CILIP and the Cataloguing and Indexing Group of CILIP.

Live Demonstration of RDA

Alan Danskin, Manager of Data Quality, The British Library

After hearing all about the benefits of RDA, we were given the opportunity to see the RDA Toolkit for ourselves. For those unable to attend the session, a webinar demonstration of the Toolkit is available [\[6\]](#).

The Toolkit has been developed to support access to the content of RDA by the Co-Publishers for RDA (the American Library Association, the Canadian Library Association, and Facet Publishing, the publishing arm of CILIP: the Chartered Institute of Library and Information Professionals). Whereas AACR2 was published in a hard copy book, RDA will be made available via an interactive online product through an annual subscription. Users will have a login account and any annotations or bookmarks they make can be transferred with them if they change organisation.

RDA instructions are searchable and browsable. A table of contents is available for the user to browse the content, whilst the search facility enables the user to perform simple text searches or limit for more advanced searches. RDA online contains the content of AACR2 and it is possible to search via AACR rule numbers. Searches can be saved to your profile and search results are ranked according to relevancy.

The Toolkit contains several resources to aid the understanding of RDA, for example a glossary and examples within the text. It also includes mappings to MARC21, information on RDA elements and FRBR/FRAD entities all of which would be useful in training cataloguers. Organisations (and individuals) will also be able to develop their own workflows and instructions.

RDA and the Future Cataloguing Community

Anne Welsh, Lecturer in Library and Information Studies, University College London

Just before lunch Anne gave us a very thought-provoking session suggesting that, rather than being completely new, FRBR actually has the same aims and goals as Cutter and Ranganathan's user-centric approach and that in producing RDA the JSC has dug to the foundations of cataloguing principles.

Re-engineering the cataloguing code to make it stronger has taken longer than expected and this has made it hard for practitioners to determine what steps they should take and when. A decision to move to RDA will in part depend on how risk averse both you and your organisation are. To try and determine the kind of changes RDA might bring about in our cataloguing practices, Anne reported on a practical exercise she had carried out with her students: she asked them to look at the examples given in Appendix M of RDA and to assess whether the changes from an AACR2 record of the same title were big, small or no change at

all. They found that most of the changes were small. Anne suggested that examining these examples was a useful exercise within our own institutions to determine what kind of changes might occur to our records and procedures and to begin thinking how we might deal with them. For example, the elimination of abbreviations means p. becomes pages which could be corrected in one global edit, and then any resulting fields containing the data '1 pages' go through another global edit to become 1 page.

Finally Anne considered what RDA means for the next generation of cataloguers. General cataloguing principles are usually taught using the main cataloguing code of the day but while we are almost between standards this is slightly complex. A library school teaches theory, but practical experience is also needed. Picking up on Alan's point that principles-based instructions encourage the cataloguer to make judgements rather than legislating for every possible case, Anne voiced an initial concern she had considered that with the Options and Alternatives allowed in RDA we could end up with a Babel-like situation making it harder to teach new students. The aim therefore is to teach them principles and international standards which can then be easily overwritten with local practices once students are in professional posts.

Spinning Straw into Gold: How to Manage Change without Losing Your Sanity

Heather Jardine, Bibliographical Access Manager, City of London Libraries

Heather provided a voice of caution to delegates considering adopting RDA without consideration and planning. Any change bears a degree of cost and so it is important to weigh up the benefits. What will RDA be able to do which is not currently possible? What are the true costs of implementation? There is not just the subscription rate to consider but also costs in terms of staff training, additional staff time spent cataloguing whilst they get used to new processes, retrospective conversion and system adaptations.

RDA places a greater emphasis on authority records and access points but maintaining them takes time which is in itself a cost. If the user can already find the items they require why invest in additional information? If more descriptive records do make a difference then be clear what these benefits are and sell the rewards to management, whose priority in the current economic climate is to reduce, not increase, costs.

As well as convincing management of the benefits, staff will need to be involved in the change to make it successful. If staff understand the reasons for changes to work practices and feel engaged in the change process, they will be more enthusiastic about the change. Heather suggested that project managers should be approachable and enthusiastic if they are to get staff engaged. RDA is an online tool and so the project manager should be someone who is used to the digital non-linear environment. Staff should be given a good understanding of the cataloguing principles and terminology on which RDA is based. Many involved in cataloguing are para-professionals and may not be familiar with FRBR or even the reasoning behind the AACR2 rules. The project manager should take the time to explain these concepts to staff rather than simply implementing a new procedure. Heather suggested organisations should soon begin to introduce staff to RDA and FRBR terminology, so that the concepts and reasoning behind the changes are understood when change is implemented later.

With careful planning and implementation the change process need not be difficult. As Heather herself summed up, 'Enjoy the journey as well as the destination.'

From MARC21 to RDA: A Suppliers Perspective on the Transition

Gwyneth Morgan, Senior Manager, Editorial Systems, Nielsen Book

(23 March only)

After much discussion from the cataloguing perspective, it was very useful to listen to a supplier perspective. Gwyneth talked about the BookData information services that are just one strand of Nielsen Book's work. As suppliers of aggregated data to a range of customers they have to think carefully about whether RDA is something customers want before they adopt a new standard. However Gwyneth was equally aware that as an industry book leader, if they do not adopt RDA, others may not be encouraged to do so, thereby leaving Nielsen Book in a slightly 'see-saw' position. The challenge for a supply company is that both input and output data will be affected. With a number of customers still using UKMARC, it is to be expected that not all customers will move to RDA, and Nielsen Book has to be ready to meet customer needs on both sides of the equation for both library and non-library customers. Changes cannot be made to data if they will be damaging to customers in the publishing sector for example.

As well as challenges, however, there will be opportunities for suppliers who adopt RDA. The ability to record more data than AACR currently allows will mean that libraries receive data of equal quality to that received by publishers through ONIX. There is also the potential for RDA to be a springboard for the development of better products.

From MARC21 to RDA: An Alternative View

Keith Tricky, Senior Lecturer, Liverpool John Moores University

(30 March only)

Keith began by outlining some of the challenges to the adoption of RDA. He identified a low level of awareness of the link between MARC and AACR2. Awareness increased with the move to MARC21 and the need to apply punctuation as defined by AACR2, but UKMARC is still widely used in the UK.

Digital media presents a new challenge for descriptive cataloguing. In the past items have been, Keith argues, broadly self-describing (e.g. a book contains a title page, ISBN, number of pages etc.) and the cataloguer simply has to record that information using a set of rules. Digital resources do not always contain this information in an easily identifiable form and this can lead to a lack of consistency in description. In the past there was a limited number of resources and so the links and relationships between those items were important. In the modern age of the Internet there are so many resources that to create too many links adds to the complexity.

The changes which have occurred in MARC21 as a response to RDA were outlined. The most significant changes have occurred in the 3XX - physical description fields. There are new

fields for content (336), media (337) and carrier (338) following the replacement of GMD. There is also greater complexity for authority records, including the option to record information relating to gender for name authority headings.

Keith suggested to delegates that they consider carefully how many of these fields they will actually need. How many cataloguers create authority headings? How many records are produced in-house and how many are imported? And finally, which is more important to you: MARC21 or AACR2?

Roundtable Discussion: What Now for RDA?

A number of interesting points were raised during the Roundtable discussions and during the question-and-answer periods throughout the day. Those of particular interest are covered below.

It was noted that there were no talks by LMS representatives and that without them it was hard to think through the practicalities of implementation. Anne mentioned that two vendors had been invited but had declined to attend based on the grounds they did not yet have enough information from the American Library Association (ALA).

Another question related to how the success of RDA could be demonstrated to managers given the likely expense of implementation. Discussion was around the use of a feedback button on the library catalogue, a catalogue use survey, and deep log analysis.

It was voiced by several delegates that a subscription charge would be difficult for smaller organisations to justify, especially in the current economic climate. UK subscription rates for the RDA Toolkit have not yet been announced but it is expected that they will be comparable to the US prices available [2]. Free access will be available following publication in June until the end of August 2010 as part of the testing phase and it was recommended to all that they make the most of this opportunity to evaluate the resource.

A matter of concern for many was the implication of the Library of Congress not adopting RDA. Alan speculated that if this does become the case then the BL would have to consider the future carefully as it is heavily dependent on LC records. Germany and Scandinavia, however are keen to translate and implement RDA and so it is not inconceivable that RDA would have a future without the LC. The results of their testing are expected to be made available in March 2011.

In terms of training materials, the British Library has received copies of the LC national testing documents and will be investigating, with the Cataloguing and Indexing Group (CIG), what training will be needed for a UK audience.

Conclusion

Both CILIP Executive Briefing sessions were well attended, with a total of over 170 delegates over the two separate days. There was a great deal of discussion about the cost and benefits of RDA and only time will tell if it will be fully implemented. For now though, the sessions provided the cataloguing community with the information needed to begin its crucial discussions with management, system suppliers and staff.

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Author Details

Wendy Taylor

Bibliographic Services Librarian
RNIB National Library Service

Email: Wendy.Taylor@rnib.org.uk

Web site: <http://www.rnib.org.uk/library>

Helen Williams

Assistant Librarian, Bibliographic Services
London School of Economics and Political Science

Email: h.k.williams@lse.ac.uk

Web site: <http://www.lse.ac.uk/library>

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