RDA: Where We Are and Where We Need to Go

Good Practices for Great Outcomes: Cataloging Efficiencies that Make a Difference

Harvard University
30 November 2011

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University of Chicago
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Next Steps for You
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<th>Columbia University</th>
<th>North Carolina State University</th>
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<td>National Agricultural Library</td>
<td>Graduate Schools of Library and Information Science (GSLIS) Group</td>
<td>North East School District, TX</td>
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<td>National Library of Medicine</td>
<td>Douglas County Libraries, CO</td>
<td>Northeastern University</td>
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<td>Backstage Library Works</td>
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<td>Brigham Young University</td>
<td>George Washington University</td>
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<td>Carnegie Library of Pittsburgh</td>
<td>Minnesota Historical Society</td>
<td>Online Audio-Visual Catalogers (OLAC)</td>
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<td>University of Chicago</td>
<td>Morgan Library and Museum, NYC</td>
<td>State Library of Pennsylvania</td>
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<td>Clark Art Institute Library</td>
<td>University of North Dakota</td>
<td>Quality Books</td>
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<td>College Center for Library Automation, FL</td>
<td>Music Library Association</td>
<td>Stanford University</td>
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Recommendations from the Test

**LC/NLM/NAL:** implementation no sooner than January 2013

**JSC:** rewrite (i.e., *reword*) RDA in clear, plain English; define process for updating RDA in an online environment

**PCC:** address authority control issues; plan training

**ALA Publishing:** improve Toolkit functionality; provide complete RDA record examples

**LC:** Begin transition to a MARC replacement

**Vendors:** move beyond MARC; develop better displays and functionality of data; support new ways of cataloging/data input.
Plan for *Rewording* RDA

- Not rewrite, *reword*
- RDA Co-publishers hiring a copy editor to address issues identified by RDA testers:
  - Wordiness
  - Complicated language and style
  - Redundancy
  - Sentence structures that result in multiple interpretations
- Deadline of June 2012 for reworded Chapters 6, 9, 10, 11, & 17, for review by U.S. RDA Test Committee and JSC


- Determine how to evolve current encoding standards
- Experiment with Semantic Web and linked data technologies
- Foster maximum re-use of library metadata in the broader Web
- Enable users to navigate relationships among entities
- Explore how to display data beyond MARC-based systems
- Identify the risks of action and inaction
- Bring existing metadata into new bibliographic systems

Next Steps for the Initiative (October 31, 2011):
PCC RDA Task Forces

  - PCC RDA-Decisions-Needed Task Group
  - PCC Task Group on Hybrid Bibliographic Records
  - PCC Task Group on AACR2 & RDA Acceptable Heading Categories
    - Headings constructed under AACR2 and valid under RDA, therefore usable as-is;
    - Headings constructed under AACR2, in need of change to be used as valid RDA headings;
    - Gray areas, where the need for change is uncertain.
Analysis of AACR2 Authority Records:

- **7,631,000 (95.1%)** = 1XX fields that can be used under RDA without further modification.

- **172,000 (2.1%)** = 1XX fields that can be used after one or more of the mechanical operations described in the report.

- **225,000 (2.8%)** = 1XX fields that may contain elements not provided for under RDA, or whose 1XX fields may lack information believed to be essential under RDA. These authority records must be reviewed and upgraded before their 1XX fields can be used under RDA.
RDA @ UChicago
18 Original Catalogers:
- 5 Monographic Cataloging (incl. Music)
- 3 East Asian Collection Cataloging (Mono and Serials)
- 2 Law Cataloging (Monos and Serials)
- 1 Serials Cataloging
- 1 Map Collection Cataloging
- 1 Rare Books Cataloging
- 1 Digital Collections (non-MARC) Metadata
- 2 Interns/Practicum students
- 2 Department/Section heads
<table>
<thead>
<tr>
<th>Category</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Original Bibliographic Records</td>
<td>1301</td>
</tr>
<tr>
<td>Monographs</td>
<td>637</td>
</tr>
<tr>
<td>Maps</td>
<td>598</td>
</tr>
<tr>
<td>Serials</td>
<td>23</td>
</tr>
<tr>
<td>Sound Recordings</td>
<td>19</td>
</tr>
<tr>
<td>Mixed Materials</td>
<td>10</td>
</tr>
<tr>
<td>Visual Materials</td>
<td>8</td>
</tr>
<tr>
<td>Integrating Resources</td>
<td>5</td>
</tr>
<tr>
<td>Computer Files</td>
<td>1</td>
</tr>
<tr>
<td>Total Authority Records</td>
<td>1202</td>
</tr>
<tr>
<td>Total Dublin Core Records</td>
<td>20</td>
</tr>
</tbody>
</table>
As of November 21, 2011:

- **Total of 12,698** RDA bibliographic records:
  - 8,001 = original RDA records created by UChicago
  - 2,113 = records we changed from AACR2 to RDA
  - 2,584 = came in as RDA copy cataloging

- **Total of 3,798** RDA authority records:
  - 3,493 = UChicago NACO records
  - Quarterly loads from automated authorities processing will add more RDA authority records over time

= 0.212% of the whole database
Implementation Philosophy

- Involve all catalogers from all cataloging operations
- Minimize local exceptions. Added only six RDA elements to our “UChicago Core”:
  - *Other Title Information* (RDA 2.3.4): Core for monos; cataloger’s judgment for serials and integrating resources
  - *Copyright Date* (RDA 2.11): Core for monos; cataloger’s judgment for serials and integrating resources
  - *ISSN of Series* (RDA 2.12.8)
  - *ISSN of Subseries* (RDA 2.12.16)
  - *Media Type* (RDA 3.2)
  - *Source Consulted* (RDA 29.6)
- Give preference to cataloger’s judgment over broad policy decisions for every scenario
Next Steps for UChicago
Building a Culture of Assessment for Metadata

- For RDA records, potential user testing of:
  - Reproductions
  - Content, Media and Carrier Types & their integration into facets
  - RDA data for music resources
  - Relationships between RDA data and our faceted catalog interface
- Reciprocal learning for catalogers and assessment colleagues
- Be cognizant of whether we are testing RDA, or RDA in MARC, or local systems configuration
Impact on Copy Cataloging

- Large impact on copy cataloging documentation and training in the long term
  - Accept copy as-is? All of the time? Some of the time?
  - Correct poor RDA copy (e.g., coded RDA but missing core elements)?
  - Assess appropriate levels of record hybridization
  - RDA-ify existing AACR2 records?
  - All of the above?
Vended Processes & Products

- Authority control processing
- Purchased MARC records
- Outsourced cataloging
Next Steps for UChicago

- Re-think impact on copy cataloging
- Build an assessment program for RDA data
- Evaluate impact on authorities processing and DBM generally
- Evaluate impact on systems design for Kuali-OLE (http://www.kuali.org/ole)
- Continuing learning about Semantic Web, linked data, alternatives to MARC Formats
Future of Metadata Infrastructures

- Transition out of MARC:
  - Impact of LC’s *Transforming our Bibliographic Framework* effort
  - Transition from record-based metadata to linked data
  - Impact on OCLC products, services
  - Impact on ILS vendor systems
  - Impact on training needs
  - Impact on staffing and required skill sets
- Before adopting RDA, adopt a culture supporting continual and iterative change
W3C Linked Library Data

- W3C Linked Library Data Incubator Group (http://www.w3.org/2005/Incubator/lld/)
  - Mission: help increase global interoperability of library data on the Web
- Key recommendations from their work so far:
  - That **library leaders** identify sets of data as possible candidates for early exposure as Linked Data;
  - That **library standards bodies** increase library participation in Semantic Web standardization, develop library data standards that are compatible with Linked Data, and disseminate best-practice design patterns tailored to library Linked Data;
  - That **data and systems designers** design enhanced user services based on Linked Data capabilities;
  - That **librarians and archivists** apply library experience in curation and long-term preservation to Linked Data datasets.
Data Continuum = Learning Continuum

OCLC / SkyRiver

Institutional Repositories

Local Catalog

Syndicated Metadata Infrastructures

AACR2 METS
ISBD MODS
MARC OAI
XML Dublin Core

RDA OWL
FRBR SPARQL
RDF ONIX
SKOS Linked Data
URI Semantic Web

IMDB / Amazon VIAF id.loc.gov
Data Continuum = Learning Continuum

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id.loc.gov

OCLC
SkyRiver

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Next Steps for You?

- Experiences of RDA testers published in current special issue of *Cataloging & Classification Quarterly* 49 (7/8)
- Understand the impact of increased RDA copy cataloging records on your library’s processes and databases
- Make 2012 your library’s “Year-for-RDA-Readiness” & commit to your own professional development
  - Get out of the FRBR/RDA “holding pattern” – learn them!
  - Follow LC-lead effort to transition out of MARC
  - Semantic Web and linked data
Transforming Our Data, Transforming Ourselves
Thank you!

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