

# United States



# Test

Presented by  
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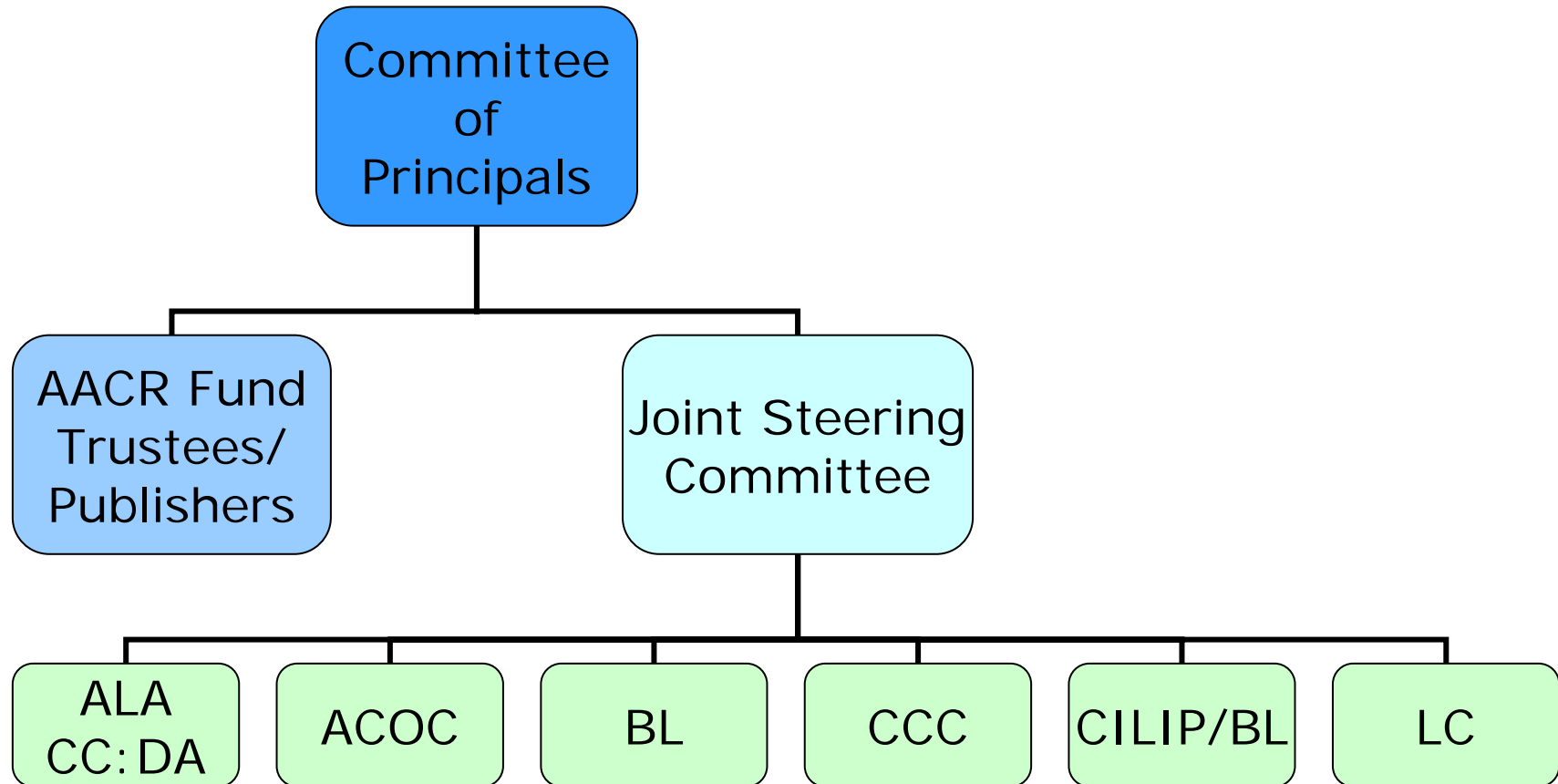
# What's wrong with AACR?

- Increasingly complex
- Lack of logical structure
- Mixing content and carrier data
- Hierarchical relationships missing
- Anglo-American centric viewpoint
- Written before FRBR
- Not enough support for collocation
- Before Internet and well-formed metadata

# 1997 International Conference on the Principles and Future Development

- **Toronto**, Canada
- JSC invited worldwide experts
- Issues leading to RDA
- Principles of AACR
- Content vs. carrier
- Logical structure of AACR
- Seriality
- Internationalization

# Supporting Organizational Structure



# JSC and Project Management Team 2009



Marjorie Bloss, RDA project manager; Marg Stewart, CCC/ JSC chair; Alan Danskin, BL; John Attig, ALA; Barbara Tillett, LC; Deirdre Kiorgaard, ACOC; Hugh Taylor, CILIP; Nathalie Schulz, JSC secretary; Tom Delsey, editor

# GOALS: *RDA* will be ...

- A new standard for **resource description and access**
- Designed for the **digital** world
  - Optimized for use as an online product
  - Description and access of all resources
    - All types of content and media
  - Resulting records usable in the digital environment (Internet, Web OPACs, etc.)

# RDA – The Goals

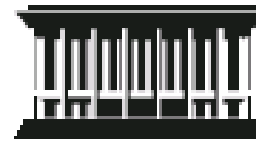
- Rules should be easy to use and interpret
- Be applicable to an online, networked environment
- Provide effective bibliographic control for all types of media
- Encourage use beyond the library community
- Be compatible with other similar standards
- Have a logical structure based on internationally agreed principles
- Separate content and carrier data
- Examples – more of them, more appropriate

# Implementation of RDA

- 2007 announcement of coordinated implementation: BL, LAC, NAL, LC



Library and Archives  
Canada



NATIONAL  
LIBRARY  
OF AUSTRALIA



LIBRARY OF  
CONGRESS



# US RDA Test - Background

- 2008 Report of LC Working Group on the Future of Bibliographic Control
  - Cease work on *RDA*
- LC worked with National Agricultural Library (NAL) and National Library of Medicine (NLM) to plan for U.S. test
- U.S. RDA Test Coordinating Committee created



# Purposes of the US RDA Test

- To determine benefits versus costs
- To see if initial release achieved the JSC objectives
  - Already knew JSC has list of issues to address after the first release
- To determine whether the three US national libraries will implement the initial release of RDA
  - Yes, no, or with conditions

# Assumptions of the Test

- Results to be shared
- Test in current systems
- All data from the test freely available
- Testers provide experiences with
  - codes they currently apply
  - RDA Toolkit

# What?

## Criteria for Evaluation

- High level operational criteria
  - How easy is RDA for catalogers to use?
  - Can *RDA* records be used in existing systems?
  - Can users find what they seek from *RDA* records?
  - Can libraries use RDA for access to a broader range of materials?

# Criteria for Evaluation (continued)

- Technical feasibility criteria—
  - Are *RDA* records interoperable with current records?
  - What changes are needed to MARC 21 (or future format schema)?
  - How easy is *RDA Toolkit* to integrate with other tools?

# Criteria for Evaluation (continued)

- Financial feasibility criteria— Determining costs of:
  - training
  - altered workflows
  - shifting from paper to subscription service for cataloging tool and documentation
  - conversion of existing data, if necessary

# US Test of RDA

<http://www.loc.gov/bibliographic-future/rda/>

# Who?

## Test partners

- 26 formal test partners, including LC, NAL, NLM
- Partners included a cross-section:
  - Types, sizes, formats, content, content codes used
  - Libraries, consortia, educators, vendors
  - Program for Cooperative Cataloging libraries
  - OCLC



# When?

## *U.S. RDA Test Timeline*

- **June 2010** ALA released RDA Toolkit
- **June-Aug.31** ALA allowed free access to RDA Toolkit to everyone who registered
- **June-Sept. 30** U.S. testers were training and had time to practice
- **Oct. 1-Dec. 31** U.S. test of RDA
- **Jan.-May 2011** analysis of test results

# Announcing U.S. National Libraries' Decision

- Early June 2011: Decision made
- Mid-June 2011: Decision announced
- Third week of June 2011: Program for Cooperative Cataloging statement issued
- June 2011: Discussions/presentations on decision during American Library Association Annual (ALA) Conference

# The Test - Methodology

- Common Original Set (25 titles)
  - AACR2 (or other current rules)
  - RDA
- Common Copy Set (5 titles)
- Extra Original Set
- Extra Copy Set
  
- Surveys

# Feedback from Participants

- Surveys for cataloger's experience and costs
- Feedback on user reaction to records built on RDA instructions
  - To help inform future adjustments to RDA
  - To help improve the IFLA models and principles
- Test records

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

# Summary of RDA Records Collected

	<b>Bibliographic</b>	<b>Authority</b>
Common original set	1,514	1,226
Common copy set	122	
Extra set	8,548	11,457
Informal testers	386	117
<b>Totals</b>	<b>10,570</b>	<b>12,800</b>

# LC's internal activities

- Prepared training materials
- Prepared documentation
- Posted training materials & documentation to U.S. Test Site and LC Cataloging Policy Site
- Training/practice for participating LC staff
  - 50 staff were involved

# Contents of Final Report

- Recommendations & impact for
  - LC/NAL/NLM senior management
  - U.S. library community (including PCC)
  - Joint Steering Committee
  - Vendors (including OCLC)
  - Co-publishers

# Contents of Final Report (continued)

- Evaluation methodology
- Findings
- Appendices
  - Data collected
  - Lessons learned
  - Webliography



# RDA Benefits

- Creates framework to bring library metadata into current information technology for Web use
  - Element-based descriptions: easier re-use of well-formed metadata, element sets, RDA Registry
  - More re-use of pre-existing metadata
  - Encourages development of new schema, new resource discovery systems
- More user- centered (FRBR/FRAD user tasks)
  - Information not abbreviated, not Latin
  - More relationships indicated
  - Potentially more access points (rule of 3 optional)
  - More distinguishing data in authority records
  - Potential for increased international sharing

# Recommendations

- Implement no sooner than January 2013, provided conditions are met:
  - Rewording in clear, unambiguous, plain English
  - Define process for updating RDA
  - Improve functionality of RDA Toolkit
  - Develop full record examples in MARC & other encoding schemas
  - Announce completion of registered RDA element sets & vocabularies

# Recommendations, continued

- Demonstrate credible progress towards a replacement for MARC
- Ensure and facilitate community involvement
- Lead and coordinate RDA training
- Solicit demonstrations of prototype input & discovery systems that use RDA element set

# Recommendations, continued

- More recommendations to
  - Joint Steering Committee for Development of RDA
  - ALA Publishing
  - The Community, including the Program for Cooperative Cataloging
  - Vendors

# Well on our way!

- LC announced Long-Range Implementation Training Plan
  - Target implementation date **31 March 2013**
  - Coordinated with other national libraries to also start 1<sup>st</sup> quarter of calendar 2012 (except Germany mid-2013 due to translation)

# RDA Implementation

- 8 institutions continued with RDA after the US RDA Test
  - RDA “Copy” available for cataloging in OCLC, SkyRiver, etc.
- LC “testers” resumed RDA cataloging Nov. 2011 (will see more copy cataloging as continue training rest of staff)

# US RDA Test – LC Support

- [LChelp4rda@loc.gov](mailto:LChelp4rda@loc.gov) (email help)
- Library of Congress Policy Statements (LCPS)
- <http://loc.gov/aba/rda/> for LC's implementation news, training materials, Webcasts, etc.

# Contact/more information

*MARC 21* standards

– <http://www.loc.gov/marc/>

- Joint Steering Committee for Development of RDA

– <http://www.rda-jsc.org/>

- RDA Toolkit assistance

– [www.rdatoolkit.org](http://www.rdatoolkit.org)



# LC Webcasts (free)

- *Resource Description and Access: Background/Overview* (May 14, 2008. 67 minutes)  
[http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4320](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4320)
- *Cataloging Principles and RDA: Resource Description and Access.* (June 10, 2008. 49 minutes)  
[http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4327](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4327)
- *FRBR: Things You Should Know but Were Afraid to Ask.* (March 4, 2009. 57 minutes)  
[http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4554](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4554)
- *RDA: Looking to the Future: Information Systems and Metadata.* (March 9, 2010. 54 minutes)  
[http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4967](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4967)

# Bibliographic Framework Transformation Initiative

- US RDA Test results: MARC seen as barrier to achieving benefits of RDA
  - Recommended evidence of credible progress towards a replacement for MARC
- Mappings or services to enable easy use of both new structures and MARC



- Led by Deanna Marcum, former Associate Librarian of Congress for Library Services
  - Internal steering group at LC
- Initiative to
  - Analyze present and future environment
  - Identify components of the framework to support users
  - Plan for evolution from present framework to future



# Issues to be Addressed

- Aspects of current metadata encoding standards to retain or evolve
  - or replace with something more compatible with Internet
- Benefits of Semantic Web and linked data technologies for adjusting current models
- Maximum re-use of library metadata so users exposed to more quality metadata in innovative ways



# Issues, continued

- Navigate relationships among entities in library catalogs and the broader Internet
- Displays of metadata beyond MARC-based
- Identify risks of action and inaction, assess acceptable pace of change
- Plan for bringing existing metadata into new bibliographic systems



# The Process

- Fully collaborative
- Consult
  - Partners
  - Customers
  - Standards experts
  - Systems designers and builders using library metadata
- Host meetings to gather input from all interested parties
  - Associations, organizations, “town hall”
  - Invitational meetings in 2012 and 2013



# How to get involved

- <http://www.loc.gov/marc/transition/index.html>  
Web site
- [BIBFRAME@listserv.loc.gov](mailto:BIBFRAME@listserv.loc.gov)  
discussion list