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LIBRARY OF CONGRESS
Long-Range RDA Training Plan for 2012 and Beyond
February 27, 2012 (Updated March 1, 2012)

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Goal

The goal of this RDA training plan for the Library of Congress is to outline the means of providing staff members with sufficient knowledge and skills so they can function as RDA catalogers when they finish classroom training.

Assumptions

1. "RDA LC Implementation Date" is defined as "the date when all catalog records newly created at LC will be produced according to RDA instructions." The Library's Acquisitions & Bibliographic Access Directorate (ABA) has set this date as ***March 31, 2013***, by which date all LC catalogers must have completed RDA training. LC's partner national libraries (U.S.: National Agricultural Library and National Library of Medicine; and non-U.S.: British Library, Library & Archives Canada, Deutsche Nationalbibliothek (DNB), and National Library of Australia) have been apprised of LC's plans and—with the exception of DNB that plans to implement a bit later in mid-2013—also plan to target the first quarter of 2013 as their RDA implementation date.

2. Training for LC staff will occur in three Phases, described below. Note that these Phases ***do not*** include those already working as "RDA Catalogers" as of November 2011 (these served as RDA Testers in 2010 and received 'Refresher Training' in October 2011).
    *   ***Phase One***: Training will start **June 2012** for a core group of approximately 30-40 trainees, identified by chiefs. Each chief shall identify at least five persons (one per section if they so desire). At least one from each division should be able to serve as a classroom instructor. Phase One trainees will be reviewed by RDA Catalogers.
    *   ***Phase Two***: Supervisors and Chiefs will be trained in **July 2012**. They will receive the same training as their staff.
    *   ***Phase Three***: The remainder of the staff will begin training in **August 2012**. Each month, three groups of 20 trainees will attend approximately 40 hours of classroom training, spread over four weeks. To help reduce the impact on trainees' schedules and allow for the production of the sections to continue, trainees will be assigned to a primarily morning group (9:00-12:00) or afternoon group (1:00-4:00).

3. Upon completion of training, Phase One trainees will join with "RDA Catalogers" to form a pool of 50-60 persons from which the Cooperative & Instructional Programs Division (COIN) and Policy & Standards Division (PSD) will draw instructors, classroom assistants, and peer-reviewers for Phase Two and Phase Three trainees.

4. After trainees complete classroom training, they will begin cataloging using only RDA.

5. Upon completion of classroom training, trainees will be reviewed by RDA catalogers in their divisions, where possible. Initially, records will be subject to 100% review; catalogers may be released from review at the reviewer's discretion.

6. "Train the Reviewer" and "Train the Trainer" instruction will be provided as necessary.

7. RDA training will be trainees' highest priority and their primary focus for that period.

8. Chiefs and section heads will prioritize trainees. Those who will assist with instruction or serve as reviewers for their division should be the first to be trained, followed by those who primarily perform cataloging duties. <u>Those who primarily perform acquisitions or non-cataloging duties may not receive training before the Implementation Date.</u>
9. Trainees will have little prior knowledge of RDA.
10. Trainees may need to adjust their work schedules. Although COIN will strive to avoid Mondays, Fridays, and Telework days, this may not always be possible.
11. Classroom training will not be scheduled in December 2012, although 'supplemental' classes may be held if necessary.
12. There will be a prescribed order of courses, and prerequisites will be used.
13. Groups of trainees will go through the curriculum as a unit.
14. Course durations stated in the curriculum portion of this document are estimates.
15. The target audience is current LC catalogers performing original and copy cataloging.
16. Copy catalogers will attend the same courses but in sessions earmarked for copy catalogers only.
17. A special training plan will be developed for the Field Offices early in 2012.
18. A modified training plan will be developed for staff new to cataloging, once all current catalogers have completed training. This will be accomplished no earlier than Fall 2013.
19. The curriculum will focus primarily on print monographs, although other formats and types will be represented in instruction, examples, and exercises. A specialized curriculum will be developed to address other formats and categories and problematic situations. As needed, this specialized training will constitute part of the overall training.

Dependencies

1. The ILS "Training" database will be made available to trainees by June 1, 2012.
2. A regular refresh schedule of the ILS "Training" database will be agreed upon by COIN, the ILS Office, and ITS, by May 1, 2012.
3. A pool of specialists will be formed by March 2012 to assist COIN with the instruction and review of the cataloging of 'special formats" (e.g., cartographic, rare materials, sound recordings, moving images).
4. RDA macros will be distributed to all staff doing cataloging as well as supervisors before training commences. Updated macros will be distributed to staff two weeks before they are to start their training.
5. Logons/passwords for the RDA Toolkit will be assigned to each person who receives training, including supervisors.
6. Similarly, Cataloger's Desktop logon/passwords will be confirmed and any necessary training in Cataloger's Desktop will be provided ahead of RDA training.
7. Divisions will develop the allocations of 'slots' for their staff, in coordination with COIN, by May 2012. Adjustments will be made for special circumstances and make-up/catch-up sessions may be offered in early 2013.

Timeline

Participants will have at least five different courses to attend, some of them consisting of multiple modules. They will receive no less than 35 hours of instructor-led classroom training, delivered over the course of 4 weeks. This total includes mandatory practice sessions and the specialized training sessions but does not include the 'reinforcement' training described on p. 6 below. An estimated 420 persons will need comprehensive training. Assuming the phased training of 60 persons each month, it will take approximately seven months (August 2012-March 2013) until all catalogers are trained.

Core Curriculum

FRBR *(MUST BE THE FIRST TRAINING COMPONENT!)*   Nine hours

FRBR Overview and Application (three hours)

- concepts and terminology
- entities, attributes, and relationships
- interactive quizzes (using Captivate tool); answers provided and posted

FRBR Follow-Up 1: Practicum (three hours)

- depending upon size, each class may be divided into groups, for group discussion of examples followed by discussion by the full class
- students are provided answer sheets of the entire exercise packet

FRBR Follow-Up 2: FRBR, RDA, and MARC (three hours)

- Focus on identifying MARC fields based on FRBR/FRAD

Using the RDA Toolkit   Three hours

- Strong emphasis on navigation and searching
- Lesser emphasis on user-contributed content and "Help"
- Hands-on, many exercises

RDA Instructions: Modules 1-5   12 hours total (as shown below)

Common principles of modules below:
- Based on August 2011 presentation by J. Kuhagen and B. Tillett to Georgia Public Library Cataloging Summit (see http://www.loc.gov/aba/rda/training_modules.html)
- PowerPoint presentations; RDA Toolkit to review instructions and reinforce structure
- Extensive quizzes using PowerPoint and/or Captivate
- Exercises, following model of October 2011 "Refresher Training"
- LCPS, new MARC fields, and new NAR fields covered as appropriate to content
- Emphasis on developing 'cataloger judgment'

Module 1: Background and Structure of RDA (three hours)
- 'improvement' on AACR2
- foundations for RDA; brief overview of FRBR
- vocabulary
- RDA structure
- sources
- transcribed vs. recorded
- parts of RDA not covered in the other modules
- tease of "Top Twelve" (see Module 5)

Module 2: Attributes of Manifestations, Items, Works, and Expressions (three hours)
- RDA chapters 2-7, 18-20
- sources
- core elements
- preferred title
- creators and contributors
- elements of expressions
- changes from AACR2
- MARC 'changes' for bibs and authorities

Module 3: Persons, Families, and Corporate Bodies (two hours)
- RDA chapters 8-11
- elements and authorized access points

Module 4: Relationships (two hours)
- RDA chapters 17-22, 24-28
- entities being related
- type of relationship
- primarily relationships for works and expressions

Module 5: Preparing for Day One (two hours)
- Preparing yourself
- "Top Twelve" things to remember
- Macros/Templates/Z-Processor/Validator

RDA Guided Practice   Three hours

- This course will provide attendees the chance to further develop expertise and the critical 'cataloger's judgment.'
- A 'common set' of resources and exercises will be provided by instructors.

RDA Practice with Actual Resources   Six hours

- This course will provide attendees the chance to further develop expertise and the critical 'cataloger's judgment.'
- Attendees will bring and discuss real RDA records they have created in their sections.
- Each session is three hours; catalogers are required to attend two sessions.
- Not to be taken until a few days after the other courses, so that attendees will have had the opportunity to have created RDA records.

Specialized Curriculum

To be completed in the month of training before Day One.

Special Situations and Formats (time variable)

- Short sessions for all monograph and serial catalogers to address special categories of materials and situations
  - compilations and collaborations
  - translations and other expressions
  - reproductions
  - serials
  - multipart items (esp. if the piece in hand is not the first part)

Special Audiences (time variable)

- content/media/carrier in general for non-print material
- material processed by specific constituencies
  - cartographic material
  - electronic resources
  - music
  - microforms
  - CD-ROMs
  - PDFs

"Reinforcement" Training

Sessions to be offered after the bulk of the training, to reinforce learning objectives in the context of practice records trainees have created

RDA Attributes (three hours)
RDA Relationships (three hours)

Online Training for Audiences External to LC Capitol Hill

In addition to classroom training, online training will be offered to a variety of audiences including staff in the Field Offices and Shelf-Ready Vendors.

- Sessions will be filmed and mounted on the web, etc.
- Classes will be conducted using a web conferencing tool for live sessions
- All training materials distributed in the classroom will be mounted on the web

Supplemental Documentation ("At a Glance," etc.)

Structural Overview of RDA
Terminology: AACR2 vs. RDA
What's Different from AACR2?
New MARC Fields
Supporting Documents (modeled on "R-documents" used in "Refresher" training)
iCohere Virtual Classrooms and Discussion Groups
[others TBD]

Sample Training Schedule

- This sample schedule below shows a generic pattern for one group, in one classroom. Each month, three such schedules for 20 trainees each can be trained.
- An overly-accelerated schedule would be unproductive and create reviewing bottlenecks.
- The schedule allows for 'recharge breaks' for trainees and instructors, and permits instructional staff to perform other duties (e.g., follow-up, consultation, review, non-RDA tasks). Mondays, Fridays, and holidays are avoided, and no trainee is required to attend training all day or every day (with the exception of the "Specialized Curriculum"). The open times can be used for 'Office Hours', make-up classes, and performance support.
- With actual and expected decreases in staffing, acquisitions considerations argue against a training schedule that completely monopolizes the time of trainees.
- 'Actual Resources Practice' sessions are delayed, to allow trainees to create records.
- Each month, there would be two morning groups and one afternoon group, allowing trainees the other half-days to review, catalog, and perform non-RDA duties.

Monday	Tuesday	Wednesday	Thursday	Friday
	FRBR Overview (three hours)	Toolkit (three hours)	FRBR FU1 (three hours)	
	RDA Instructions: Module 1 (three hours)	RDA Instructions: Module 2 (three hours)	RDA Instructions: Module 3 (two hours)	
	RDA Instructions: Module 4 (two hours)	RDA Instructions: Module 5 (two hours)	FRBR FU2 (three hours)	
	Guided Practice (three hours)	Practice w/ Actual Res. (three hours) Spec. Sit./Formats (three hours)	Practice w/ Actual Res. (three hours) Spec. Audiences (three hours)	