

RDA: Resource Description & Access—Reports from the Field

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RDA: Resource Description & Access is the first new library cataloging code to be implemented in English-speaking countries in the twenty-first century. Since the 1990s, there has been increasing discussion about making fundamental revisions to the *Anglo-American Cataloguing Rules*, 2nd edition (AACR2), prompted by fast-paced changes and trends in information resources and technology. This eventually led to a 2004 decision by the Joint Steering Committee for Revision of AACR (JSC) to initiate the comprehensive rule revision process and prepare a new edition under the working title of “AACR3: Resource Description and Access.” In 2005, however, the JSC concluded that a change of direction was needed after reviewing the constituency responses to the draft of part 1 of the proposed new edition, and decided to develop a new cataloging code with a new working title “RDA: Resource Description and Access.” The full draft of RDA was made available in 2008, and the official RDA text was then published online in 2010. In the U.S. library community, following the 2010-2011 U.S. National Libraries RDA Test, the Library of Congress decided to move forward with full implementation of RDA on March 31, 2013.

A number of key design elements have underscored the development of RDA, including, but not limited to, its alignment with the new international conceptual models for bibliographic and authority data. While RDA is built on the AACR2 foundations and most of its instructions are compatible with the old AACR2 rules, it is intended to provide a principles-based framework for resource description and access based on the new *Statement of International Cataloguing Principles* developed by the International Federation of Library Associations and Institutions, an extension of the FRBR (Functional Requirements for Bibliographic Records) and FRAD (Functional Requirements for Authority Data) models. As such, RDA is designed to provide a flexible and extensible framework that is easily adaptable to accommodate all types of content and media in today’s rapidly evolving technology environments, while also producing well-formed data that can be shared easily with other metadata communities and can be adaptable within a wide range of resource discovery environments. Unlike AACR2, RDA is also designed for use as a non-Anglo-American, international standard. At the time of this writing, there have been official RDA translation projects in four languages and several European library communities are preparing to adopt RDA as their new cataloging standard.

It should come as no surprise that the development and implementation of RDA has raised a series of important questions both in cataloging theory and practice. Such questions include differences between RDA and AACR2 records, RDA cataloging in MARC (Machine-Readable Cataloging) formats and the relationship of RDA to an emerging Linked Data environment, RDA's flexibility and adaptability for cataloging non-traditional types of formats and materials, RDA's impact on end user tasks, and RDA's reception within the cataloging community. For thousands of catalogers and cataloging managers working every day, perhaps their most pressing, overriding concerns in the last couple of years have been cataloging training in RDA and getting their systems ready for RDA implementation.

This special issue is in large part a collection of papers from practitioners in the field reflecting on different areas of challenges they have encountered in adapting to the first major overhaul in cataloging codes in over three decades. Hanford's article provides a good overview of what seems to have been a widely shared experience in making the change to RDA across hundreds of small cataloging departments with shrinking staff and resources. The value of collaboration is an important message conveyed by the author, who also documents a somewhat unique story of how a medium-size library at a four-year academic institution came to participate in the 2010–2011 U.S. National Libraries RDA Test. To her surprise, Hanford reports that there were no specialized RDA training materials created exclusively for the Test participants. Rather, she observes that being part of a larger cataloging community and training with other catalogers was the real primary value of participating in the national test. Her article inevitably should raise a question as to how the cataloging community can best foster such wider communication and collaboration to enhance training and learning experience in the field.

As Hanford's article shows, RDA training obviously has been a major concern in the field during the initial transition period. Lee's article proposes to look at RDA training sessions for new catalogers under the added formal lens of education theories. Based on her experience as a cataloging trainer at her institution, the author analyzes how the structure, content, and pedagogy of different modules may have varied between AACR2 and RDA training. Lee also considers RDA training from the prism of "pedagogical content knowledge" and examines how the models of teacher knowledge have the potential to bring a fresh perspective to the analysis of cataloging training in general. This foray into the education literature is a welcome addition that could help fill a significant gap in the library literature by providing theoretical frameworks for conceptualizing how learning occurs and what can make professional education more successful.

The RDA training question is also the central focus of Frost's article reporting on his personal experience organizing and delivering a week-long RDA workshop in Belize. There were no linguistic barriers to be overcome in the former British colony; however, the author provides an interesting descriptive narrative of several practical challenges faced when crossing the borders as an RDA trainer, such as lack of knowledge with the participants' cataloging backgrounds and local cataloging contexts—which required some flexibility on his part in delivering RDA training in an unfamiliar, foreign land. Frost reports that "heavy reliance on online resources and

the internet generally as the main source of credible information” had led many Belizean catalogers to decline participation in the RDA workshop. Then, he brings up an interesting point about how face-to-face, hands-on workshops can offer an ideal vehicle to provide in-depth training that could empower Belizeans to become trainers themselves and strengthen local leadership and capacity.

The article by Goldberga, Kreislere, Sauka, Sturmane, and Virbule discusses some of the unique challenges faced in countries where the official language is not English. They explain how Latvia, with no prior national cataloging rules, has decided to adopt RDA to participate in an open web of international data circulation and use quality metadata created by non-Latvian institutions. Lack of financial and personnel resources in the National Library of Latvia (NLL) has hindered a full translation of RDA, while linguistic and cultural differences have presented issues with translating some of the key RDA concepts and terminology into the Latvian language. The authors provide some description of new resources and services developed for RDA training across Latvian libraries, which will be carried out on a scale never seen before in the small Baltic country. This story of the Latvian journey to RDA is also useful in illustrating the value of international library cooperation in RDA internationalization, such as the NLL’s participation in the European RDA Interest Group and an online network of training resources shared freely by other national libraries that have already implemented RDA.

The replacement of the General Material Designation (GMD) with three new RDA elements—content, media, and carrier types—is one of the most noticeable differences between AACR2 and RDA records. While the information, currently coded in MARC 336, 337, and 338 fields, could help support the ability to distinguish information resources at expression and manifestation levels in future FRBRized catalogs, libraries have been grappling with the question of how to use these MARC fields effectively in their current OPACs. The two articles, by Caudle and Schmitz and by Ou and Sexon, each examine this question from slightly different angles. Caudle and Schmitz report how the Auburn University Libraries have programmed VuFind, their open-source OPAC, to use information in MARC 336 and 338 field for the display of format information. They observe that while the new RDA code in VuFind is much cleaner, more logical, simpler, and easier to program, RDA does not yet provide the granularity needed, forcing them to pull more granular format information from other MARC fields. Ou and Sexon survey how libraries running III (Innovative Interfaces Inc.) integrated library system are displaying MARC 336, 337, and 338 fields in their public interfaces. Not surprisingly, their survey results reveal a wide array of current practices in a time of transition, with some libraries adding the GMD to their RDA records while many more are adding these MARC fields to their AACR2 records as a way to deal with the AACR2/RDA hybrid environment. They also find frustration with insufficient vendor support in making use of the new RDA elements, which might underscore the limitations of current systems in unleashing the full potential of RDA.

The articles by O’Dell and Reese cover two important issues relating to RDA—its potential for use in non-library contexts and the need to deal with a mixed bag of RDA and AACR2 records in

library catalogs. Evaluating RDA's applicability for describing alternative publications, O'Dell finds its instructions appropriate for providing intellectual access for the "zine library community"—a network of independent collections, reading rooms, and storefront centers as well as academic and public libraries that have acquired and circulated zines, self-published, non-commercial, small-circulation works usually dealing with non-mainstream, controversial topics. At the same time, the author identifies areas for extending RDA guidelines to meet descriptive needs for zines, such as documenting zine makers and their roles, addressing the complexities of copyrights and privacy concerns, using additional non-RDA standards and vocabularies, and cataloging zines as cultural objects. Reese discusses how he has incorporated new functions into his MarcEdit software, an indispensable toolkit for all cataloging librarians, to help with the initial transition period and provide automated pathways for libraries to modify AACR2 and RDA records to some extent based on their local workflows. His original research regarding vendor adoption of RDA is a significant contribution to the literature, and the introduction of his RDA Helper should be of interest to many catalogers, metadata librarians, and systems administrators.

Taken together, the articles published in this special issue tend to focus on our immediate past and present, examining RDA adoption processes and transition issues from multiple angles. Ultimately, it seems reasonable to conclude that RDA has not yet made our daily cataloging work any easier in the current implementation environment, with added time and energy needed for staff training and revising local workflows, for example, without immediate visible improvements in users' resource discovery experience. However, we must remember that RDA is part of the key steps to make the cataloger's work relevant for an emerging web of data. Indeed, in addition to the RDA Helper tool discussed in his article, Reese also has already started working on new MarcEdit features to give its users the option to make MARC data more Semantic-Web friendly and explore new Linked Data/BIBFRAME concepts and data models. In that sense, the current special issue is simply the start of a larger conversation about the future of library metadata, and a major focus of our conversation likely will be how the library community might integrate its cataloging data into the wider information access environment, as well as how we might leverage the existing library metadata for that future.