

Getting Ready for RDA:  
Ideas, Strategies, and Resources

---

March 16, 2013  
Richard A. Stewart  
Indian Trails Library District  
Wheeling, Illinois

Get the  
**EDGE**  
COSUGI 2013 • SALT LAKE CITY

---

---

---

---

---

---

---

---



Get the  
**EDGE**  
COSUGI 2013 • SALT LAKE CITY

---

---

---

---

---

---

---

---



Get the  
**EDGE**  
COSUGI 2013 • SALT LAKE CITY

---

---

---

---

---

---

---

---

### Aspects of Planning for RDA

- Timeline — what do we want to do when?
- And — how far do we want to go?
- Training
- Technical implementation: vendor capabilities, ILS integration, display & retrieval
- Budgeting — training, RDA subscription
- Administrative support



---

---

---

---

---

---

---

---

### Implementation

- LC's target date: March 31, 2013  
    "... when all catalog records newly created at LC will be produced according to RDA instructions."
- NAL, NLM, British Library, Library and Archives Canada, National Library of Australia: same target
- DNB: midyear



---

---

---

---

---

---

---

---

### Implementation

- Also on target date:
- Name Authority File (NAF) will be flipped to RDA forms



---

---

---

---

---

---

---

---

### Implementation—OCLC

Effective March 31, 2013:

- May use AACR2, RDA, any other code
- May change AACR2 to RDA (previously applied only to minimal-level or less or continuing resources)
- May add RDA elements to AACR2 records (hybrid)
- LC PCC PS: not binding but you may wish to follow (as with LCRIs)



---

---

---

---

---

---

---

---

### Implementation—OCLC

- Regardless of code, **must use forms of access points found in LC/NACO authority file**  
For practical purposes = **RDA or RDA-compatible**
- **Control all access points** if possible

(OCLC RDA Policy Statement,  
<http://www.oclc.org/us/en/rda/new-policy.htm>)



---

---

---

---

---

---

---

---

### Implementation—SkyRiver

Three options:

- *RDA Mode*  
preparing or ready for RDA
- *Hybrid Mode*  
adopting RDA but still needing non-RDA data elements
- *Non-RDA Mode*  
not yet ready for RDA cataloging

Libraries may move from one mode to another

("SkyRiver Announces Novel Approach to RDA Adoption,"  
<http://theskyriver.com/2011/12/skyriver-announces-novel-approach-to-rda-adoption>)



---

---

---

---

---


---

---

---

**Timeline**

- Your choices—when to implement, how extensively
- New original cataloging only?
- New original & copy cataloging only?
- Accept full-level records as they are?
- Convert existing records to RDA? In full? In part (hybrid records)?
- Or skip the whole thing?



Get the **EDGE**  
COALITION 2013 • SALT LAKE CITY

---

---

---

---

---

---


---

---

**An option, probably not a good one**

“A library that creates original cataloging for all titles, does not participate in a shared catalog, and does not conform to LC authority practice may not need to make this decision. All other libraries will probably want to conform to RDA at some point, just as a matter of practicality.”

—MARCIVE Inc.



Get the **EDGE**  
COALITION 2013 • SALT LAKE CITY

---

---

---

---

---


---

---

---

**Convert existing data or not?**

- RDA designed to coexist with pre-RDA records
- Consider (strongly) converting access points
  - Consistent retrieval and collocation
  - Possible FRBR-enabled enhancements
- Description less critical
- Content, Media, Carrier (336, 337, 338)?
  - May—eventually will—affect display and retrieval
  - Consult with SirsiDynix, others



Get the **EDGE**  
COALITION 2013 • SALT LAKE CITY

---

---

---

---

---

---

---

---

### Automating your conversion

- Outsourcing
  - SirsiDynix
  - Outside vendors
- In-house batch changes (MarcEdit?)
  - Be sure you know what you're doing!
  - Test database = Very Good Idea
- Anticipate cleanup




---

---

---

---

---

---

---

---

### Training

- Still a big issue
- Less centralized, more self-directed
- Many kinds of resources




---

---

---

---

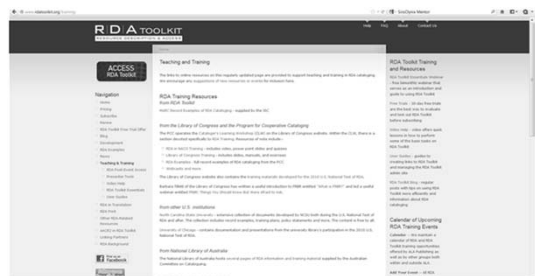
---

---

---

---

### JSC Resources




---

---

---

---

---

---

---

---

---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



---

### ALCTS YouTube Channel

ALCTS YouTube Channel

RDA Series Webinars  
24 2,175

Check out the playlist to see all the free RDA webinars from ALCTS.

About ALCTS Continuing Education  
Five webinars from the Association for Library Collections & Technical Services (ALCTS).  
5 playlists by ALCTS Continuing Education  
View all videos  
& 500 views

Featured Playlists

Get the **EDGE**  
COUGG 2013 • SALT LAKE CITY

---

---

---

---

---

---

---

---

---

---

### OCLC

OCLC

The world's libraries. Connected.

About OCLC Publications News and Events Contact Us

WorkCat Membership Products and Services Support and Training Research

RDA and OCLC About RDA

About RDA

RDA, Resource Description and Access, is the new cataloging standard that will replace AACR2. RDA offers libraries the potential to change significantly how bibliographic data is created and used. Published in July, 2010, RDA is now available, and certain libraries have started using it for their current cataloging workflow. The Library of Congress has announced full implementation of RDA for March 31, 2013. To help you prepare for implementation of RDA at your library, we've compiled a list of some of the resources that are available. Items include work being done at OCLC to support implementation of RDA and resources available from ALA, LC, and other sources.

RDA resources

- An RDA Passage
- The RDA Toolkit Web site
  - Training calendar
- Library of Congress resources
  - Training materials

RDA-related resources from OCLC

- Policy Statement on RDA Cataloging in WorkCat
- OCLC Metadata Schema Transformation Services
- Contract Cataloging Services for Publishers
- RDA resources available on the OCLC Training Portal

Get the **EDGE**  
COUGG 2013 • SALT LAKE CITY

---

---

---

---

---

---

---

---

---

---

### OCLC

OCLC

The world's libraries. Connected.

Home About Us Products and Services Support and Training Research About OCLC Publications News and Events Contact Us

Welcome to the OCLC Training Portal

OCLC OFFERS FREE ONLINE TRAINING FOR MEMBERS

As part of our ongoing commitment to our members' education, OCLC is pleased to offer free, on-line product training for many services that cover Cataloging, Record Sharing, CONNEXION, and Training services.

The vast majority of our services are available for free. OCLC offers a variety of training and learning opportunities. OCLC courses and training sessions—through Webinars, MOOCs, OCLCNET and VIMAGES—will continue to offer a wide variety of classes and training opportunities to help members utilize our OCLC educational services, and learn new applications to help members manage their businesses in the marketplace. Some of the practical services will continue to be offered to the ALA areas and to OCLC training partners.

On-site training or customized courses for your library are still an option. Simply contact the OCLC Training Team, by calling 1-888-666-0881, or by sending an e-mail to training@oclc.org to discuss specific interests and needs.

Get the **EDGE**  
COUGG 2013 • SALT LAKE CITY

---

---

---

---

---

---

---

---


---

---

**SkyRiver**

- Not providing formal RDA training program
- Include RDA fields/capabilities in training as needed

(email from Georgia Fujikawa, VP Operations, SkyRiver)




---

---

---

---

---

---

---

---

**State Resources**



The screenshot shows the Utah State Library website. The main content area is titled "Cataloging Basics" and includes sections for "Cataloging", "AACR2", "RDA", and "Classification". The "Cataloging" section explains that library catalogs contain information about materials owned by the library and that cataloging is the process of creating a bibliographic record. The "RDA" section mentions that RDA (Resource Description and Access) is the upcoming new rules that will replace AACR2. The "Classification" section states that catalogers assign call numbers to assist library customers in locating materials.




---

---

---

---

---


---

---

---

**Books!**

- Oliver, Chris. *Introducing RDA*
- Tillett, Barbara. *What Is FRBR?*
- El-Sherbini, Magda. *RDA: Strategies for Implementation*
- Maxwell, Robert L. *Maxwell's Handbook for RDA*
- Journal articles
  - Anhalt, Joy, and R. Stewart, "RDA Simplified," *Cataloging & Classification Quarterly* v. 50, no. 1, 2012




---

---

---

---

---

---

---

---



### Implementing training

- Extent and nature of training will depend on your use of RDA
- Make sure resources are known to your staff
- Support for learning is vital
  - Financial to the extent possible
  - Time
  - Interest and patience
- Involve staff in teaching colleagues—in department and out



---

---

---

---

---

---

---

---

### Implementing training

- Discuss and exchange ideas about RDA
  - Motivation
  - Confirms learning
  - Puts RDA in local context
- Practice is vital!
- Chicago Public Library's idea: regular meetings to discuss how a title would be cataloged under RDA



---

---

---

---

---

---

---

---

### Technical implementation

- Most or all vendors prepared to handle new tagging
- SirsiDynix supplying new tag validations (264, 336, 337, 338) with software updates
- Ask! Discuss! Ask again!



---

---

---

---

---

---

---

---

### Technical implementation

- The GMD question—still no universal answer, but GMD is on the way out
  - Icons from record data—likely the future norm
  - Might be possible to construct local GMDs similarly—do you want to?
- Take advantage of vendor-related opportunities
- User groups
- Listservs
- Webinars, workshops, etc.



---

---

---

---

---

---

---

---

### Budgeting

- Training—can spend a lot or a little
- Data conversion
  - Discuss with vendors
  - Can adjust scope by your needs & resources
- RDA subscription
  - Will vary by number of subscribers
  - Consider consortial access if available
  - Print RDA available—cheaper, less up to date



---

---

---

---

---

---

---

---

### Administrative support

- Consider administrator's view
  - Same or better service for same or less expense?
  - If more expense, how does better service justify it?



---

---

---

---

---

---

---

---

### Administrative support

- Talking points
  - RDA will be national (and international) standard—in the long run, cheaper to be compatible
  - More online resources require a cataloging standard adapted to them
  - AACR2 no longer updated—will fall further behind
  - Future retrieval enhancements will be impossible without RDA
  - People increasingly go to Web first—RDA will help libraries integrate resources with the Web and keep us in front of the public's eyes



---

---

---

---

---

---

---

---

### Special thanks to:

Joan Chapa, MARCIVE Inc.  
Erica Laughlin, RAILS, East Peoria Office  
Mary Mastraccio, MARCIVE Inc.  
Janifer Meldrum, MARCIVE Inc.  
Marjory Oliker, Chicago Public Library  
Mike Tribby, Quality Books Inc.  
Jennifer Young, Northwestern University  
"Spider Bit" (slide 2) by Rosie Stewart



---

---

---

---

---

---

---

---

Richard A. Stewart  
Cataloging Supervisor  
Indian Trails Library District  
355 Schoenbeck Rd.  
Wheeling, IL 60090

847-279-2214

[rstewart@indiantrailslibrary.org](mailto:rstewart@indiantrailslibrary.org)  
[www.indiantrailslibrary.org](http://www.indiantrailslibrary.org)



---

---

---

---

---

---

---

---

Three Catalogers Walk Into a Blog

<http://3catalogers.wordpress.com/>

Flaming Catheads

<http://flamingcatheads.wordpress.com/>

Program materials will be posted on both blogs  
as well as the Conference website.



---

---

---

---

---

---

---

---