



**Program for
Cooperative Cataloging**
BIBCO / CONSER / NACO / SACO

RDA Implementation Task Group Progress Report

Presented by Adam Baron
PCC Policy Committee Meeting
November 7, 2024

RDA Implementation Task Group

Representatives to/from:

- Library of Congress
- PCC Policy Committee (PoCo)
- PCC RDA Communications Committee
- PCC Task Group on Organization of PCC Documentation
- PCC Task Group to Test the Official RDA Toolkit
- PCC Working Group on Metadata Application Profiles
- Standing Committee on Standards (SCS)
- SCS Task Group on CONSER Policies for Official RDA in MARC
- SCS Task Group on Provider Neutral MARC Record Guidelines for Monographic E-Resources in Official RDA
- SCT RDA Training Task Group: Monographs
- SCT RDA Training Task Group: Name Authorities

RDA Implementation Task Group Accomplishments

- Regularly shared updates from representatives
- Created [PCC Official RDA Implementation Tasks](#) list
- Developed [FAQs on Official RDA Implementation](#)
- Proposed Description Convention Source Code for PCC's implementation of the official RDA Toolkit
- Drafted MGD for new Description Convention Source Code
- Proposed revisions for fictitious characters and real non-human entities
- Helped to initiate the SCT RDA Training Task Group: Name Authorities

State of Implementation of Official RDA

As part of its implementation of the official RDA Toolkit, the Program for Cooperative Cataloging (PCC) is committed to providing documentation and training, including the following:

- LC-PCC Policy Statements (LC-PCC PSs)
- Metadata Guidance Documentation (MGDs)
- Metadata Application Profiles (MAPs)
- Training for cataloging print and electronic books and serials
- Training for creating and updating LC/NACO authority records

Phase 1: PCC Introductory RDA Training

- Developed by SCT RDA Training Task Group: Monographs
- To help catalogers identify key changes introduced during the 3R Project, use and navigate the RDA Toolkit, understand new concepts, and define key vocabulary terms
- [Phase 1: PCC Introductory RDA Training](#)
 - 17 modules released December 13, 2023
- [Phase 1: PCC Introductory RDA Training Webinars](#)
 - 11 webinars presented from March 13-May 22, 2024

Phase 1: PCC Introductory RDA Training Feedback

- Interested in in-person training opportunities
- Wanted additional exercises to complete after the webinar
- “Thank you so much to every presenter and everybody else involved in making phase 1 of the webinar series so very successful! I really learned a lot from all the webinars and from every knowledgeable presenter. Now I am truly inspired to master and apply RDA terminology and concepts ...”

Phase 1: PCC Introductory RDA Training Feedback

- “These sessions spent an excessive amount of time discussing previous cataloging standards. ... in some of these sessions the presenters spent over 20 minutes at the start talking about LRM and other “background/context” information before we ever got to hear anything about official RDA ... in general, it should not be necessary for people to get a refresher on other cataloging standards in order to understand and use RDA. It should be understandable on its own terms. If PCC feels that they *need* to put in this background information in order for the training to make sense, then that to me suggests that the problem is with RDA itself.”

Phase 1: PCC Introductory RDA Training Feedback

- “This series of training seems excessively theoretical and extremely difficult for folks new to cataloging. You seem to be reinventing the wheel, and I've no idea why. ...”
- “It seems like every definition of the “new” terminology involves the exact word you're trying to define.”
- “I have tried to be as open minded as possible, but these trainings have left me frustrated overall. It was especially frustrating for folks on your committee and/or part of the presentation to ask extremely bizarre hypothetical questions during their own presentation. That was absolutely maddening. ... We're all learning here, please don't further confuse us with your oddball, theoretical, and unhelpful questions. ...”
- “It's evident that your committee cares about this training and how to help attendees. I just wish there was more work on how these concepts will directly and practically affect us. Theories are vital for academia but impractical for training. Perhaps I'm expecting different outcomes than these trainings were defined? Perhaps we're just being introduced to concepts to think about...that's fine. These sessions are just way different than I expected. ...”

Phase 1: PCC Introductory RDA Training Feedback Response

- Introductory training was designed to introduce new terminology and concepts rather than the practical application of how to catalog using official RDA
- RDA is aligned with LRM – an understanding of LRM helps with understanding RDA
- Some of the webinars did become too hypothetical, which far exceed the objectives for the module

Phase 2: RDA in Practice Training

Considerations from Phase 1

- Focused on practical application of official RDA
- Expecting to include more exercises
- Catalogers who do basic copy cataloging may require different training than those who do original cataloging
 - The PCC training aims to be comprehensive to support original cataloging, but managers can adapt it to meet their staff's needs

Phase 2: RDA in Practice Training Charge & Deliverables

Charge

- Develop training for PCC participants to catalog print and electronic books using the official RDA Toolkit, LC-PCC Application Profile, LC-PCC Policy Statements, and LC-PCC Metadata Guidance Documents

Deliverables

- Report on the changes in PCC practice from original RDA to official RDA
- Bridge training focused on changes in cataloging practice in official RDA
- Full training for cataloging print and electronic books in official RDA

Phase 2: RDA in Practice Training

Changes from Original RDA

- Objective
 - To systematically review official RDA elements, comparing how practices in official RDA are different from practices in original RDA
- Elements
 - A list of 163 elements to review was prepared based on:
 - Draft BSR for Official RDA
 - Element lists in the official RDA Toolkit
 - Metadata Guidance Documentation (MGDs)
- Assignments
 - Task group members were divided into pairs and assigned a selection of elements to review with each element being reviewed by both people

Phase 2: RDA in Practice Training

Changes from Original RDA Spreadsheet

- Elements
 - RDA Entity, Guidance, Resources
 - RDA Element or Guidance
- Official RDA practice
 - LC/PCC Core or Recommended Practice
 - New, Updated, No Change in Practice
 - Summary of Official RDA Practice
 - Official RDA Value Example
- Original RDA practice
 - Summary of Original RDA Practice
 - Original RDA Value Example
- General Notes or Comments
- Training
 - Include in Bridge Training
 - Include in Full Training
 - Notes for Training
- Reviewer assignments and tracking
 - Reviewer 1
 - Reviewer 1 Done
 - Reviewer 2
 - Reviewer 2 Done
 - Additional Reviewers
 - Review by Task Group
 - Comments for Review

Phase 2: RDA in Practice Training Changes from Original RDA Spreadsheet

General tab

- Topic
- Notes or Comments
- Include in Bridge Training
- Include in Full Training
- Notes on Training

Phase 2: RDA in Practice Training

Changes from Original RDA Spreadsheet

MGDs tab

- RDA Entity or Guidance
- MGD
- Changes from Original RDA
- Original RDA
- Official RDA
- General Notes or Comments
- Include in Bridge Training
- Include in Full Training
- Notes for Training
- Assigned to
- Done

Phase 2: RDA in Practice Training Changes from Original RDA Initial Impressions

- Many practices remain unchanged
- Elements with updates more likely represent minor changes than major changes
- Significant changes in the cataloging process and how cataloging decisions are made
- Documentation needs to be updated

Phase 2: RDA in Practice Training

Beginning Bridge Training Outline

- Documentation for official RDA and how they work together
 - RDA Toolkit
 - LC-PCC Policy Statements (LC-PCC PSs)
 - Metadata Guidance Documentation (MGDs)
 - BIBCO Standard Record (BSR) Official RDA Metadata Application Profile
- Reading and interpreting common RDA instructions, LC-PCC PSs
- Required non-RDA & MARC data (e.g., MARC 040)
- Data provenance – Sources of information
- Guidelines on normalized transcription
- Basic cataloging decisions: mode of issuance (and Work: extension plan)

Phase 2: RDA in Practice Training

Additional Bridge Training Topics

- Aggregates
- Representative expressions
- PCC relationship labels
- WEM lock (particularly for monographic series)
- Change in family name being used as subjects
- Timespans
- Nomens
- Agents/Collective Agents
- Fictitious and real non-human entities
- Notable changes in WEMI levels

RDA Communications Committee

Charge

- Establish an ongoing process for communicating about the Official RDA Toolkit to the PCC membership
- Develop mechanisms, including monitoring the PCC list, to solicit and receive community input and encourage ongoing discussion
- Receive and track suggested changes to policy and forward to the appropriate PCC groups
- Develop a process for how the community input will be reviewed and acted upon, communicating suggestions to existing groups (e.g. SCS) or proposing new groups
- Recommend and implement processes for communicating outcomes to the PCC membership

RDA Communications Committee Feedback Form

<i>Type of Feedback</i>	<i>Count</i>
Feedback	11
LC-PCC Policy Statement revision	67
Metadata Guidance Document (MGD) revision	51
PCC RDA Training feedback	17
Question	11
Grand Total	157

<i>Country</i>	<i>Count</i>
	2
Argentina	1
Canada	10
Netherlands	7
South Africa	7
United States of America	130
Grand Total	157

<i>Year</i>	<i>Count</i>
2021-2022	43
2022-2023	35
2023-2024	79
Grand Total	157

RDA Communications Committee Feedback Review

- Review feedback received and decide on next steps
 - If not a change in cataloging practice, forward to LC RDA Project Team
 - If a change in policy or cataloging practice, forward to SCS
- Follow up on feedback received at later meetings

RDA Communications Committee Notable Feedback Under Review

- LC-PCC PSs for representative expression elements
- Recording a value for an element that appears in a parallel language or script
- Under review by SCS
 - Description Convention Source Codes
 - Fictitious and Real Non-Human Entities Proposal

Library of Congress Documentation Updates

LC-PCC PSs

- Boilerplate policy statements for relationship elements are still in progress, and hopefully will be done by the February 2025 release

MGDs

- Determined that 179 of the 369 MGD recommendations from the PCC RDA test should be implemented
- Completed 87 MGD updates, which includes 75 from the PCC RDA test
- Trying to get all 68 minor updates remaining from the test done before the end of the year
- SES MGDs are still in progress; finished ones are now available and the others might be done by the end of the year

Library of Congress Major MGD Updates

- 36 major MGD updates remain from the PCC RDA test
 - Adding new examples
 - New guidance
 - Major revision
- PTCP is not able to work on or finish all of the major MGD updates; will collaborate closely with the final publication of the documentation
- This work will be passed on to PCC

Library of Congress Policy Decisions and Questions

- Which vocabulary encoding schemes are we willing to accept for various elements?
- How do we want to handle soft-deprecated elements?

Translating PCC Introductory RDA Training Materials in Spanish

- Professor and cataloger in Mexico wants to translate the PCC Introductory RDA Training Materials into Spanish
- Training materials are licensed under CC BY 4.0, which would cover the translation
- Would PCC want to have an official Spanish translation of the materials? If so, what would we need to do to make that happen?

Discussion

- Questions, comments, concerns
- Spanish translation of Introductory RDA Training
- Major MGD updates