Program for Cooperative Cataloging
PCC
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PCC Task Group Final Report Transmittal & Tracking Sheet

Date task group charged	February 1, 2022
Date task group discharged	November 17, 2023

This form is to be used to track progress on the review, approval, and implementation of the final reports of PCC task groups and committees. A link to this form can be found in the task group charge. Thereafter, the form should be updated each time the report is transmitted to a different body for review or action. Additional rows may be inserted as needed. The PCC Secretariat will insert the completed form as the cover sheet for the report when the process is complete.

Submission of report (completed by chair/leader of group):
Use the chart below to record the date the report was first submitted, the name of the PCC task group or committee submitting the report, and the title of the report.

Date	Name of Group	Title of Report
October 10, 2023	PCC Task Group to Test the Official RDA Toolkit	Final Report of the PCC Test of the Official RDA Toolkit

Review of report (completed by PCC chair prior to passing report on for review):
Use the chart below to record the date the report was submitted for review, to which body, and its current status (e.g. in process, completed, etc.).

Date	Name of Body	Status of Review
November 2, 2023	PoCo	Discussed report and its recommendations

Decisions regarding report:
Use the chart below to record decisions made regarding the report.

Date	Name of Body	Decisions Made
November 17, 2023	PoCo	Report and its recommendations accepted

Implementation of report:
Use the chart below to record actions taken regarding implementation of the decisions.

Date	Name of Body	Actions Taken

Program for Cooperative Cataloging
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Test of the Official RDA Toolkit

Final Report

Executive Summary

The PCC Task Group to Test the Official RDA Toolkit was formed in February 2022, to help make PCC's transition to official RDA as smooth as possible. The task group was charged with ensuring that before implementation of official RDA:

- PCC catalogers can accurately catalog materials in various formats in both MARC and BIBFRAME[1]
- Library of Congress-Program for Cooperative Cataloging Policy Statements (LC-PCC PSs) and Metadata Guidance Documentation (MGDs) work well in the new Toolkit

It was important to examine the impact on catalogers of splitting the LC-PCC Policy Statements (LC-PCC PSs) from the original RDA Toolkit into separate, complementary resources: the pared down LC-PCC PSs within the official RDA Toolkit and the more detailed Metadata Guidance Documentation (MGDs) hosted as PDF files outside of the Toolkit.

To accomplish these objectives, the task group was instructed to design and conduct a test and to deliver reports and updates to the PCC community.

The test aimed to identify areas of the LC-PCC PSs and MGDs that need to be updated before – or after – implementation. It was conducted in three phases:

Phase 1	Cataloging by testers	October 17 - November 4, 2022
Phase 2	Evaluation of testers' templates	November 14, 2022 - January 30, 2023
Phase 3	Analysis of posttest surveys and evaluators' templates	February - September 2023

In the first phase, 45 experienced catalogers who were unfamiliar with the official RDA Toolkit served as testers. They were not provided with substantive training on official RDA concepts or terminology, nor with metadata application profiles. The task group hosted a virtual meeting to provide a basic introduction to using the RDA Toolkit.

Testers were asked to pretend they had never cataloged before and to document the steps they took while cataloging. In the provided templates, testers were expected to record the RDA instructions, LC-PCC Policy Statements, and MGDs they applied. The task group also requested that testers note any problems they encountered, as well as any questions they had about RDA instructions, policies, or guidance.

[1] It is worth noting that the Sinopia templates, and BIBFRAME overall, were not updated for official RDA prior to this test; consequently, many comments from test participants point out discrepancies between the Sinopia templates and official RDA.

Bibliographic and authority descriptions were created by testers and submitted for evaluation. The 240 bibliographic descriptions encompassed a variety of content types, physical media, and modes of issuance. Of the bibliographic descriptions, 87% were created in MARC and 13% in BIBFRAME (specifically Sinopia). Sixty-six percent were for English-language materials. Of the 46 authority descriptions created, 43% were for personal names, and over 25% were for corporate bodies.

For the second phase of the test, the 19 evaluators with good working knowledge of the official RDA Toolkit were asked to assess the cataloging descriptions created by the testers. Each evaluator had a template where they noted cataloging mistakes and compiled testers' comments and observations. Evaluators also contributed their own observations and recommendations regarding which LC-PCC Policy Statements, MGDs, and RDA Toolkit content might need revision.

All testers and evaluators completed a required posttest survey in which they were asked open-ended questions about their experience testing the official RDA Toolkit. The survey also requested suggestions for training development and the implementation process.

In the analysis phase, the task group reviewed the posttest surveys and examined the templates submitted by evaluators, which amounted to almost 6,000 rows of data. Feedback was analyzed to combine similar comments, reduce duplication, and ensure consistency across all of the data.

Template comments were divided into categories to facilitate further action, including:

Category	**Number of Comments**
LC-PCC Policy Statements	1522 comments
Metadata Guidance Documentation	630 comments
RDA Toolkit	530 comments
BIBFRAME/Sinopia	472 comments
Training	355 comments

For all categories above, the majority of comments concerned the Manifestation entity.

The evaluation of the templates showed that, across the spectrum, testers missed crucial pieces of information as they were cataloging their resources. Analysis of these omissions and cataloging errors highlighted some areas that could be addressed by training.

Through their template comments and survey responses, testers and evaluators contributed many helpful recommendations. Suggestions include:

- Creating metadata application profiles

- Creating guides to help catalogers get started in the Toolkit and apply RDA instructions
- Improving consistency across MGDs
- Adding more examples in the Toolkit
- Developing online and in-person training on:
    - Understanding RDA
    - Particular cataloging tasks
    - Special material formats
- Completing recommended revisions to LC-PCC PSs and MGDs before implementation
- Implementing in phases
- Collecting feedback on revised LC-PCC PSs and MGDs from early adopters

On July 18, 2023, the task group submitted test results related specifically to the LC-PCC Policy Statements and Metadata Guidance Documentation to the PCC Policy Committee (PoCo) and the Policy, Training, and Cooperative Programs Division (PTCP) at the Library of Congress for further action. The primary document submitted was a spreadsheet of actionable recommendations, questions, and comments from testers, evaluators, and task group members. It contained 625 entries concerning the LC-PCC Policy Statements and 366 entries for the MGDs. A brief summary report accompanied the spreadsheet to provide background information, highlight issues that stood out to the task group during data analysis, and recommend some possible solutions.

Additionally, the task group realized early in the testing process that the RDA Toolkit issues identified by participants could help the RDA Steering Committee (RSC) improve the official RDA Toolkit. Therefore, on August 25, 2023, a spreadsheet of 417 comments related to the RDA Toolkit was shared with the North American RDA Committee (NARDAC). The task group recommended that all comments be reviewed by NARDAC and the RSC and that comments be sent to relevant RSC working groups.

While the specific focus of this test was ensuring that the LC-PCC Policy Statements and MGDs work well in the new Toolkit, PCC's overall goal is to ensure that catalogers can use the RDA Toolkit to accurately catalog materials in various formats in both MARC and BIBFRAME. Thus, this report includes observations and requests not only for the LC-PCC Policy Statements and MGDs, but also for BIBFRAME, Sinopia, and the official Toolkit itself. In addition, by analyzing errors and information missed during cataloging, general trends in Toolkit usability are inferred, and some training needs have been identified.

PCC RDA Test at a Glance

Task group was charged in February 2022 with ensuring that before implementation of the official RDA Toolkit:

- PCC catalogers can accurately catalog materials in various formats in both MARC and BIBFRAME
- LC-PCC Policy Statements (LC-PCC PSs) and Metadata Guidance Documentation (MGDs) work well in the new Toolkit

Three phases of the test:

1) Cataloging by testers: October 17-November 4, 2022
2) Evaluation of testers' templates: November 14, 2022-January 30, 2023
3) Analysis of posttest surveys and evaluators' templates: February-September 2023

The 45 testers came from:

- 34 different institutions
- Academic, public, national, and government libraries
- United States, Canada, and Europe

Tester responsibilities:

- Create 6-8 bibliographic descriptions
    - 4 testers created BIBFRAME descriptions in Sinopia
- Create at least 1 authority description (if NACO trained)
- Complete tester template
    - Document steps taken to create descriptions
    - Note RDA instructions, LC-PCC PSs, and MGDs applied
    - Note problems encountered and questions about instructions, policies, or guidance
- Submit copies of final descriptions and surrogates of items described
- Complete posttest survey

Testers created:

- 240 bibliographic descriptions
    - Encoding
        - 87% in MARC
        - 13% in BIBFRAME (specifically Sinopia)
    - Formats
        - Majority for printed monographs, followed by electronic books and print serials
            - BIBFRAME descriptions for print and electronic books, serials, and videodiscs
    - Languages
        - 66% for materials in English language
        - 25% for materials in other languages

        - 9% with no linguistic content (scores, musical recordings, and photographs)
- 46 authority descriptions
    - 43% for personal names
    - > 25% for corporate bodies
    - Remainder for works, conferences, expressions, series, place

Evaluator responsibilities:

- Complete evaluator template
    - Review testers' bibliographic and authority descriptions for errors and missing information
    - Evaluate testers' templates to assess whether appropriate RDA instructions, LC-PCC PSs, and MGDs were followed
    - Compile comments from testers' templates
    - Provide observations regarding revision of LC-PCC PSs, MGDs, and RDA Toolkit content
    - Identify specific training needs
- Complete posttest survey

Analysis:

- Performed by task group
- Over 6,000 rows of data from evaluators' templates
    - 472 comments on BIBFRAME and Sinopia
    - Combined similar comments, reduced duplication, and ensured consistency across data
- 45 posttest surveys from testers
- 19 posttest surveys from evaluators

Results:

While the specific focus of this test was ensuring that the LC-PCC PSs and MGDs work well, PCC's overall goal is to ensure that catalogers can use the RDA Toolkit to accurately catalog materials in various formats in both MARC and BIBFRAME. Thus, the test results include observations and requests not only for the PSs and MGDs, but also for BIBFRAME, Sinopia, and the official Toolkit itself. In addition, by analyzing errors and information missed during cataloging, some training needs can be identified, and general trends in Toolkit usability can be inferred.

Comments from evaluators' templates were deduplicated and sorted into like issues:

- LC-PCC Policy Statements
    - 1522 comments
    - 625 problems
    - 119 problems resolved during the time period between the test and the analysis
    - 82 recommendations identified as needing PCC policy decisions
- Metadata Guidance Documentation
    - 630 comments

    - 366 problems
    - 51 problems resolved during the time period between the test and the analysis
    - 14 recommendations identified as needing PCC policy decisions
- RDA Toolkit
    - 530 comments
    - 417 problems
    - 13 problems resolved during the time period between the test and the analysis

Some suggestions from testers and evaluators:

- Create metadata application profiles
- Create guides to help catalogers get started in the Toolkit and apply RDA instructions
- Improve consistency across MGDs
- Add more examples in the Toolkit
- Develop online and in-person training on:
    - Understanding RDA
    - Particular cataloging tasks
    - Special material formats
- Complete recommended revisions to LC-PCC PSs and MGDs before implementation
- Implement in phases
- Collect feedback on revised LC-PCC PSs and MGDs from early adopters

Reporting:
The task group submitted two reports containing actionable requests and general comments from the test results:

Report	Date	Documentation	Submitted to
1	July 18, 2023	LC-PCC Policy Statements *and* Metadata Guidance Documentation	PCC Policy Committee (PoCo) *and* Policy, Training, and Cooperative Programs Division (PTCP) at the Library of Congress
2	August 25, 2023	RDA Toolkit	North American RDA Committee (NARDAC)

Methodology

In February 2022, the PCC Task Group to Test the Official RDA Toolkit was charged with ensuring that before implementation, “PCC catalogers can accurately catalog materials in various formats in both MARC and BIBFRAME” and that “the PCC policy statements and metadata guidance documents work well in the new toolkit.” It was also important to examine the impact on catalogers of the Toolkit's new format for the LC-PCC Policy Statements (LC-PCC PSs) as well as the introduction of Metadata Guidance Documentation (MGDs) to provide specific MARC and BIBFRAME instructions. The task group was directed to design and conduct a test, organize groups of volunteer testers and evaluators, analyze the results of the test, and deliver reports and updates to interested stakeholders.

The task group was co-chaired by Adam Baron (University of California, Berkeley) and Judith Cannan (Library of Congress). Other members were Dominique Bourassa (Yale University), Annick Cloatre (British Library), Laura Doublet (University of Victoria), Greta de Groat (Stanford University), Oksana Osborne (U.S. Government Publishing Office), Trina Soderquist (Library of Congress), and, until her retirement at the end of 2022, Gordana Ruth (National Library of Medicine). The task group met weekly, beginning in March 2022, and worked towards achieving the deliverables listed in their charge.

Phase 1: Cataloging by Testers

The cataloging portion of the test officially ran from October 17-November 4, 2022, but preparation for it began even before the task group was given its charge. The initial call for test participants was put to the PCC listserv by the chair of the PCC Policy Committee (PoCo) in December 2021. The task group issued a second call in September 2022. Volunteers were asked to fill out a participation survey, which included detailed information about the test; asked volunteers about what formats, languages, and scripts they could catalog; determined their levels of expertise in those areas; and identified volunteers willing to work with BIBFRAME.

Fifty testers were initially selected. They came from 36 different institutions, including academic, public, national, and government libraries in the United States, Canada, and Europe. Taken together, they had experience cataloging in a variety of formats, languages, and scripts.

The task group provided two training sessions for volunteer testers. The first, held on October 3, 2022, provided an introduction to the official RDA Toolkit and included logging into the Toolkit and creating a profile, navigating and searching the Toolkit, and personalizing the Toolkit. During the second training session on October 11, 2022, testers were presented with the purpose and overview of the test, were introduced to their template and Google Drive folder, and saw a demonstration on how to fill out the template. A question-and-answer period ended the session.

Shortly after completing these training sessions, each tester received an assignment email specifying in which bibliographic editor (a MARC-based system or Sinopia) they were to work, along with links to their template and Google Drive folder, the posttest survey, and documentation and training materials. Documentation included a detailed set of guidelines for completing the test and filling out the template, a blank tester template, and a sample tester template (see Appendix A).

Testers were instructed to create 6-8 bibliographic descriptions and at least one authority description, if they were NACO trained, using the official RDA Toolkit, the LC-PCC PSs, and the MGDs. They were instructed to document the steps they took to describe items, noting the RDA instructions, LC-PCC PSs, and MGDs they applied. The task group also requested that testers note any questions they had about the instructions, policies, or guidance, or problems they encountered. Testers uploaded copies of their final descriptions and surrogates of the items described to their Google Drive folder. Finally, they completed and submitted the posttest survey.

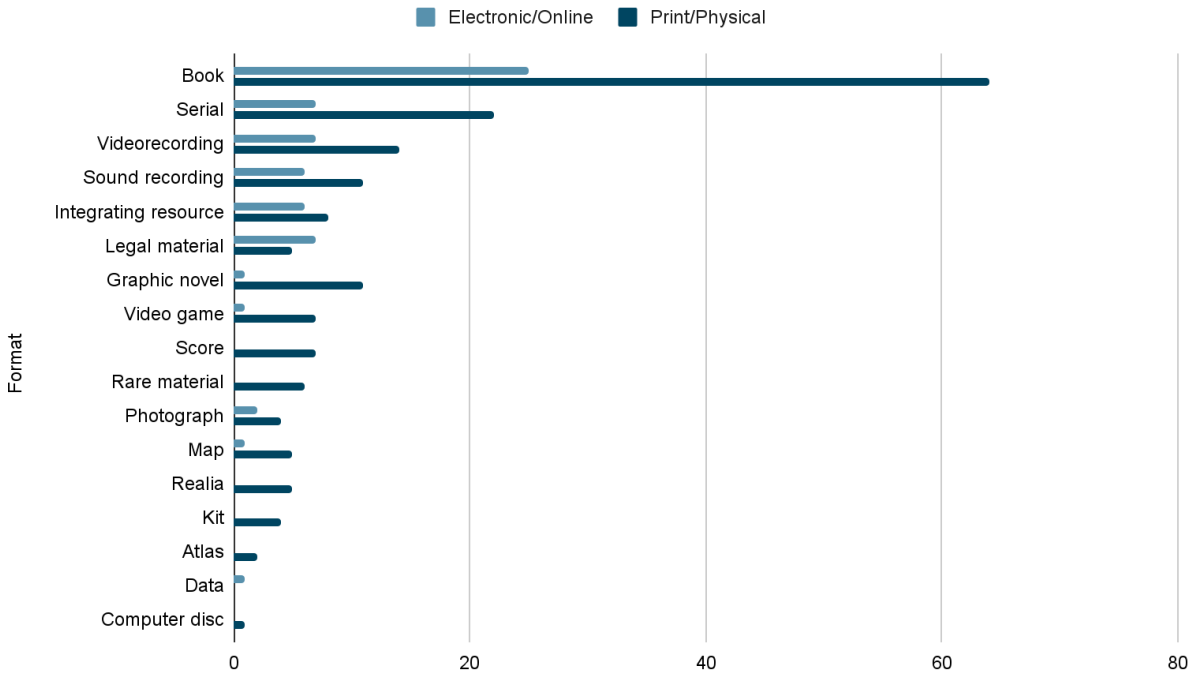
During the three weeks of the test, the 45 testers who completed their assignment created 240 bibliographic descriptions and 46 authority descriptions. Eighty-seven percent of the bibliographic descriptions were in the MARC format, and 13% of the bibliographic descriptions were in BIBFRAME (specifically Sinopia). The majority of the bibliographic descriptions were for print books, followed by 25 electronic book descriptions and 22 print serial descriptions (see Table 1 and Chart 1). Only one description each was created for an electronic map, an electronic graphic novel, a data set, and a computer disc.

Table 1
Bibliographic Descriptions: Distribution by Format

	Number of Bibliographic Descriptions		
Format	**Electronic/Online**	**Print/Physical**	**Grand Total**
Book	25	64	89
Serial	7	22	29
Videorecording	7	14	21
Sound recording	6	11	17
Integrating resource	6	8	14
Legal material	7	5	12
Graphic novel	1	11	12
Video game	1	7	8
Score	0	7	7
Rare material	0	6	6

	Number of Bibliographic Descriptions		
Format	**Electronic/Online**	**Print/Physical**	**Grand Total**
Photograph	2	4	6
Map	1	5	6
Realia	0	5	5
Kit	0	4	4
Atlas	0	2	2
Data	1	0	1
Computer disc	0	1	1
Grand Total	**64**	**176**	**240**

Chart 1
Bibliographic Descriptions: Distribution by Format

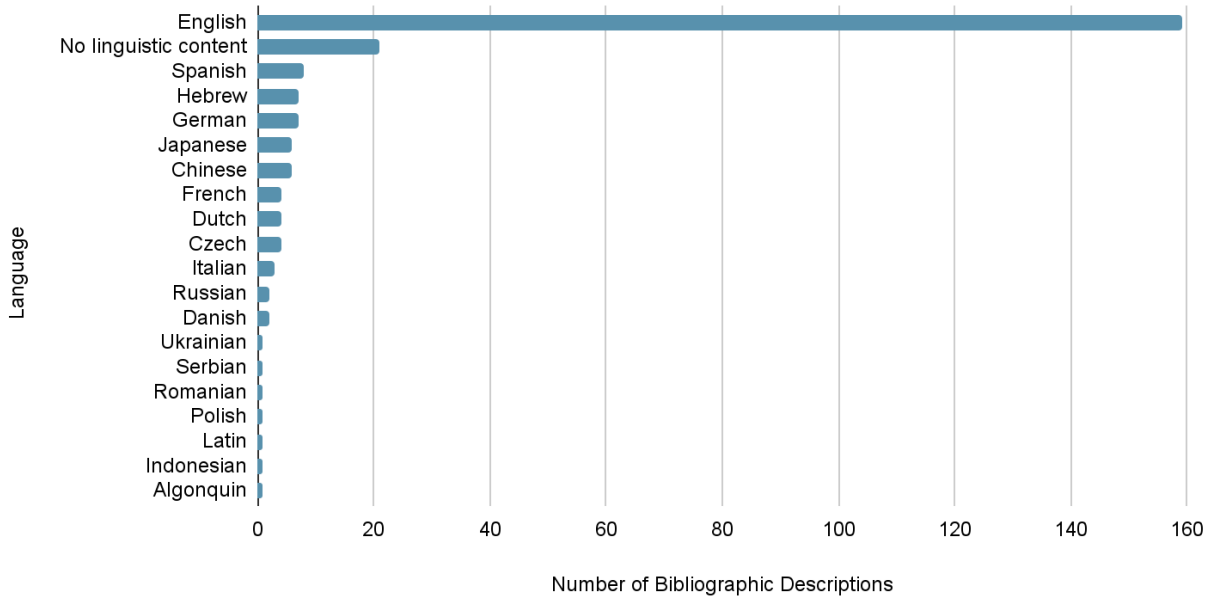


Sixty-six percent of the bibliographic descriptions were for English-language materials (see Table 2 and Chart 2). Other languages – ranging from Spanish to Indonesian – accounted for 25% of the bibliographic descriptions. The remaining bibliographic descriptions had no linguistic content; these materials included scores, musical recordings, and photographs.

Table 2
Bibliographic Descriptions: Distribution by Language

Language	Number of Bibliographic Descriptions
English	159
No linguistic content	21
Spanish	8
Hebrew	7
German	7
Japanese	6
Chinese	6
French	4
Dutch	4
Czech	4
Italian	3
Russian	2
Danish	2
Ukrainian	1
Serbian	1
Romanian	1
Polish	1
Latin	1
Indonesian	1
Algonquin	1
TOTAL	**240**

Chart 2
Bibliographic Descriptions: Distribution by Language

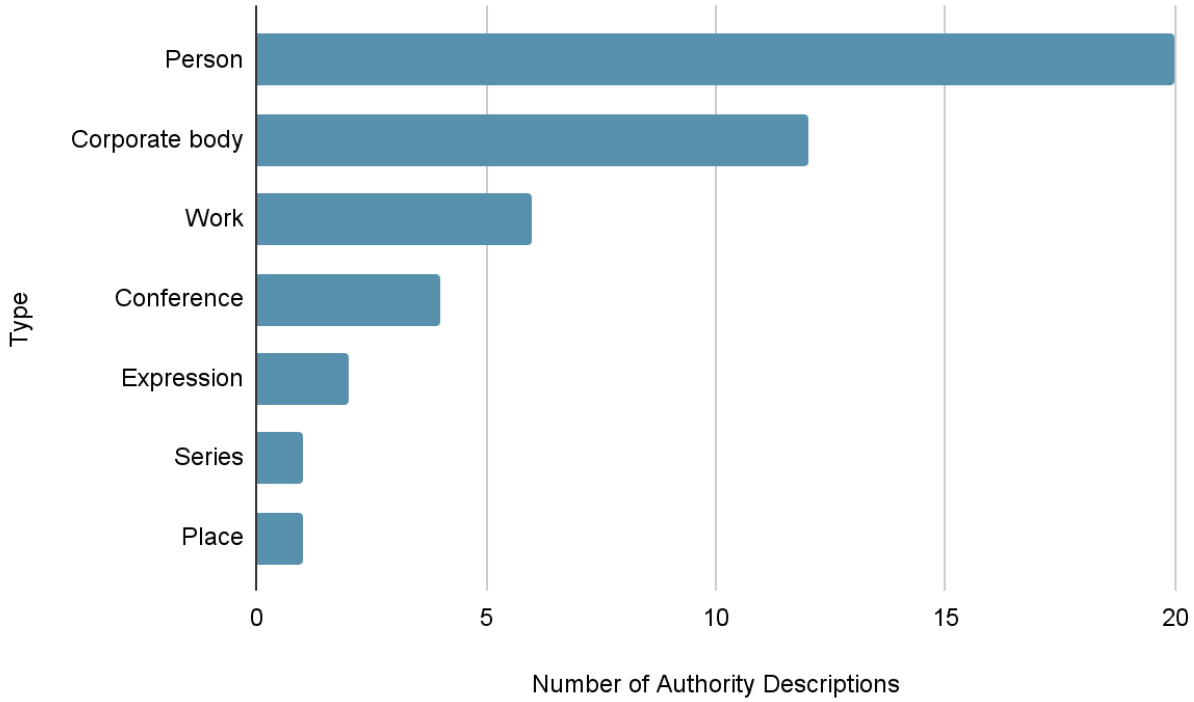


The 46 authority descriptions were created in the MARC format. One tester focused solely on authority descriptions; the remainder of the authority descriptions were submitted by testers who primarily provided bibliographic descriptions. Of the authority descriptions, 43% were for personal names and over 25% were for corporate bodies (see Table 3 and Chart 3). The remaining authority descriptions were for works, conferences, expressions, a series, and a place.

Table 3
Authority Descriptions: Distribution by Type

Format	**Number of Authority Descriptions**
Person	20
Corporate body	12
Work	6
Conference	4
Expression	2
Series	1
Place	1
TOTAL	**46**

Chart 3
Authority Descriptions: Distribution by Type



Phase 2: Evaluation of Testers' Templates

The evaluation of the testers' templates and bibliographic and authority descriptions ran from November 14, 2022-January 30, 2023. Evaluators were drawn from the Library of Congress' Acquisitions and Bibliographic Access (ABA) directorate staff and from PCC members who had helped write LC-PCC PSs or MGDs for the official RDA Toolkit. Additional evaluators with a good working knowledge of official RDA were also recruited. Of the 19 total evaluators, 7 were from the Policy, Training, and Cooperative Programs Division at the Library of Congress, 4 came from other ABA sections, 6 worked at academic libraries, and 2 came from other national institutions.

In October 2022, the evaluators were asked to fill out a participation survey, which included detailed information about the test; asked evaluators about what formats, languages, and scripts they could evaluate; determined their levels of expertise in those areas; and identified those willing to evaluate BIBFRAME descriptions.

The task group provided one training session for the evaluators on November 7, 2022. Evaluators were provided with the purpose and overview of the test, an introduction to the tester files they would review, and a demonstration of how to fill out their evaluator template with their findings. A question-and-answer period ended the session. Shortly after the training session, the

evaluators received personalized emails with links to their assigned testers' Google Drive folders, their evaluator template and Google Drive folder, the posttest survey for evaluators, documentation and training materials, and the roster of evaluators (see Appendix A).

Each evaluator was responsible for reviewing the work of 2-4 testers, with a total of 12-19 bibliographic and authority descriptions for each evaluator to assess. Evaluators were asked to analyze the tester templates and compile comments and observations in order to point out where LC-PCC PSs and MGDs might need revision as well as to identify specific training needs. After finishing their review, the evaluators completed a posttest survey.

Phase 3: Analysis of Posttest Surveys and Evaluators' Templates

After the evaluation ended on January 30, 2023, the task group began analyzing the results. The analysis consisted of reviewing the testers' and evaluators' posttest surveys and then the evaluators' templates, which included comments and insights evaluators collected from the testers' templates. In total, the task group examined 45 posttest surveys from testers, 19 posttest surveys from evaluators, and almost 6,000 rows of data from the evaluators' templates.

The goals of the task group's analysis were to:

- Identify and recommend changes to LC-PCC PSs and MGDs, prioritizing changes that must be made before implementation when possible.
- Identify and recommend changes to the official RDA Toolkit.
- Identify areas that require extra attention during training.
- Provide suggestions for implementation.

Posttest Surveys

The posttest surveys for testers and evaluators included sets of open-ended questions covering each of the above-stated goals, plus space for final comments.

The task group organized the responses into almost three dozen categories:

- Aggregates
- Application profiles
- Authority records / Access points
- BIBFRAME / Sinopia
- Capitalization
- Change in practice
- Consistency
- Core elements
- Data provenance / Source of metadata / Metadata work
- Diachronic works
- Entities
- Examples
- Expressions
- Glossary
- Language / Style / Terminology / Definitions
- Manifestation
- MARC
- Navigation / Search
- Other documentation
- RDF/XML

- Recording methods
- Related works
- Relationship elements / Relationship labels
- Representative expression
- Resource description (coherent, minimal, effective)
- See template
- Special formats
- Specific elements
- Structure / Organization
- Suggestion
- Superelements / Subelements; Related elements; Shortcuts; Hierarchy
- Transcription guidelines
- Vocabulary Encoding Schemes
- WEMI
- Which instruction/element

After the survey responses were placed into categories, it became clear which issues were of greatest importance to the testers and evaluators. For example, both sets of respondents overwhelmingly agreed that the testers had problems interpreting the official RDA Toolkit, especially with figuring out which element, instruction, or recording method to apply.

Evaluators' Templates

The evaluators' templates included their assessments of and comments on the cataloging decisions made by the testers, as recorded in the testers' templates. The task group combined all of the evaluators' templates into a single spreadsheet, resulting in nearly 6,000 rows of data. The task group divided up the rows of data, identifying duplicate or similar feedback and consolidating it. The feedback was then separated into categories loosely based on the problem types in the evaluator template:

- LC-PCC Policy Statements
- Metadata Guidance Documentation
- RDA Toolkit
- Incorrect (e.g., incorrect element, instruction applied, or value)
- Information missed by tester
- Other
- Other–BIBFRAME/Sinopia
- Other–Training

The feedback was reviewed again to further consolidate comments and ensure consistency across all of the data.

Results

While the specific focus of this test was ensuring that the LC-PCC PSs and MGDs work well in the new RDA Toolkit, PCC's overall goal is to ensure that catalogers can use the Toolkit to accurately catalog materials in various formats in both MARC and BIBFRAME. Thus, the test results include observations and requests not only for the policy statements and metadata guidance documents, but also for BIBFRAME, Sinopia, and the official Toolkit itself. In addition, by analyzing errors and information missed during cataloging, some training needs can be identified, and general trends in Toolkit usability can be inferred.

Because the test was designed to identify problems that need to be corrected to support PCC's implementation of the official RDA Toolkit, the test results primarily focus on the problems rather than areas where there were no concerns. Moreover, the number of comments and problems cited is not necessarily indicative of major issues that would delay or significantly impact implementation; instead, they can indicate areas where PCC may need to focus on improving documentation and/or developing training.

Throughout the test, the task group presented preliminary results at various PCC meetings to keep the community informed (see Appendix B). The results presented in this report are a summary of the most frequently cited or most significant problems. Not all problems encountered during the test are discussed here. As not all elements and instructions were used during the test, these results do not identify all potential problems.

LC-PCC Policy Statements

The most comments received during the test were related to the LC-PCC Policy Statements (LC-PCC PSs). Testers, evaluators, and task group members provided 1522 comments on approximately 625 different problems. Of these 625 problems, 119 (19%) were resolved after the test but before the analysis was complete, and an additional 82 (13%) were identified as requiring a policy decision from PCC before being changed. Over 52% of the LC-PCC PS comments pertained to the Manifestation entity, which accounted for approximately 44% of the LC-PCC PS problems cited (see Table 4). This percentage difference between the number of comments and the number of problems indicates that there was more duplication in comments for Manifestations than any of the other entities. In considering the other resource entities, Work received 232 comments (15%) on 106 problems (17%) and Expression had 145 comments (10%) on 65 problems (10%).

Table 4
LC-PCC PS Comments: RDA Entity, Guidance, and Resources

RDA Entity, Guidance, Resources	Number of Comments	Number of Problems Cited
Manifestation	797	274
Work	232	106
Guidance (see Table 6)	193	73
Expression	145	65
Corporate Body	50	24
Person	35	28
Resources (see Table 7)	17	16
Timespan	14	9
Agent	11	11
Nomen	8	4
Collective Agent	7	7
Place	7	2
Family	4	4
RDA Entity	1	1
Item	1	1
TOTAL	**1522**	**625**

As evidenced by Table 5, the element *extent of manifestation* garnered the most comments, with 79 comments on 16 problems. Many of the comments brought forward problems with recording extent for diachronic works (i.e., serials and integrating resources), including differences from current CONSER practice and confusion over the phrase “formerly diachronic works.” It was also unclear when to record a term from the RDA Carrier Type vocabulary encoding scheme or the RDA Carrier Extent Unit vocabulary encoding scheme. Further, there were questions about the LC/PCC Core requirement and when catalogers must record *extent of manifestation*.

The next three elements with the most comments were *content type*, *carrier type*, and *media type*. The element *content type* had 63 comments on 9 problems, *carrier type* had 56 comments on 11 problems, and *media type* had 47 comments on 8 problems.

One of the problems with recording these elements was the choice of vocabulary encoding scheme. The LC-PCC PSs give preference to the RDA vocabulary encoding schemes, but current practice and guidance in the Metadata Guidance Documentation is to prefer terms and codes from LC vocabulary encoding schemes, namely Term and Code List for RDA Content Types, Term and Code List for RDA Carrier Types, and Term and Code List for RDA Media

Types. In addition, if the preference is to continue using the LC vocabulary encoding schemes, there is a disconnect when recording the term “other”; the LC-PCC PSs say to record “other” as an unstructured description, but “other” is included as a term in the LC vocabulary encoding schemes, so it could be recorded as a structured description.

The confusion and lack of guidance over the choice of vocabulary encoding scheme may have contributed to testers’ difficulty with recording the notation or identifier in MARC subfield $b in fields 336, 337, and 338.

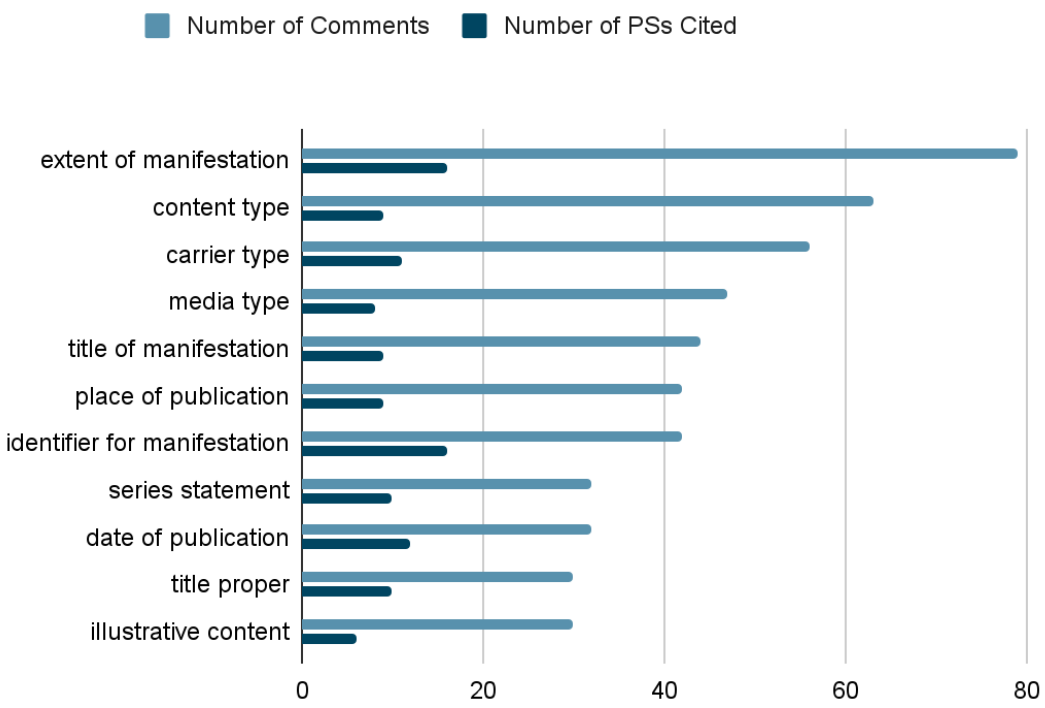
Another frequently cited problem was recording the vocabulary encoding scheme used as a source of information (i.e., MARC subfield $2). The current LC-PCC PS reads: “LC/PCC practice: Do not apply the option unless specifically required by policy or the metadata system.” Participants found this policy statement perplexing for several reasons: (1) they interpreted it to mean that they should no longer regularly record MARC subfield $2, (2) they were unsure of the policy to which they should be referring and why the policy was not included in the policy statement, and (3) they questioned what was meant by “metadata system.”

While these problems were routinely cited when recording *content type*, *media type*, and *carrier type*, these same problems occurred when recording values of other elements using terms from the RDA vocabulary encoding schemes or other appropriate vocabulary encoding schemes.

Table 5
LC-PCC PS Comments: Top RDA Elements

RDA Element	**Number of Comments**	**Number of Problems Cited**
extent of manifestation	79	16
content type	63	9
carrier type	56	11
media type	47	8
title of manifestation	44	9
place of publication	42	9
identifier for manifestation	42	16
series statement	32	10
date of publication	32	12
title proper	30	10
illustrative content	30	6

Chart 4
LC-PCC PS Comments: Top RDA Elements



Of the Guidance chapters, Guidelines on normalized transcription had the most comments with 78 comments on 20 problems (see Table 6). Beyond the additional work needed to specify which options apply to which elements, participants noted problems with capitalization, non-Latin scripts, numbers, and punctuation.

Table 6
LC-PCC PS Comments: Guidance Chapters

Guidance Chapter	**Number of Comments**	**Number of Problems Cited**
Guidelines on normalized transcription	78	20
Recording methods	34	6
Data provenance	26	11
Describing a manifestation	19	9
Data elements	10	6
Describing a work	9	8
Manifestation statements	9	5
Describing an expression	2	2

Guidance Chapter	Number of Comments	Number of Problems Cited
Aggregates	1	1
Application profiles	1	1
Coherent description of an information resource	1	1
Diachronic works	1	1
Guidelines on basic transcription	1	1
Minimum description of a resource entity	1	1
TOTAL	**193**	**73**

Comments on the LC-PCC PSs in the Resources section of the official RDA Toolkit received by far the fewest comments with only 17 comments on 16 problems (see Table 7). Most of the comments in this section concerned the Anglo-American legacy instructions for legal works.

Table 7
LC-PCC PS Comments: Resources

Resource	Number of Comments	Number of Problems Cited
Terms in English	4	3
authorized access point for expression of legal work: Anglo-American legacy instructions	3	3
authorized access point for legal work: Anglo-American legacy instructions	3	3
preferred title of legal work: Anglo-American legacy instructions	3	3
Abbreviations for units	1	1
Abbreviations of terms in English for countries and states	1	1
Glossary	1	1
variant access point for work: Anglo-American legacy instructions	1	1
TOTAL	**17**	**16**

Unlike some of the aforementioned problems, which were concentrated on specific elements or sections, some problems were frequently cited across many elements.

For starters, testers regularly commented on problems with recording relationships to related entities as unstructured descriptions, such as recording creation and production credits in MARC field 508 or participants and performers in MARC field 511. As an example, testers came across the relationship element *contributor agent to performance* and wanted to use it to record performers as an unstructured description in MARC field 511; the MARC 21 Bibliographic

alignment in the official RDA Toolkit suggests that this is possible, but the LC-PCC PS only permits recording the element using “a structured description, identifier, IRI, or valid combination thereof” and prohibits using an unstructured description. It was unclear why LC/PCC practice does not allow recording the element as an unstructured description or what alternative element should be used for recording the information as an unstructured description. Without this guidance, some testers either disregarded the policy statement or omitted the information thinking that LC/PCC practice had changed with official RDA and the information could no longer be recorded as an unstructured description.

Other comments that often came up during the test concerned links to Metadata Guidance Documentation (MGDs) in the LC-PCC PSs. Links to MGDs were still being added at the time of the test and testers cited LC-PCC PSs where they felt links to MGDs should be added. Where links to MGDs were already included in the RDA Toolkit, testers sometimes commented that the MGD was either too broad or too specific for their situation and they were annoyed that they had to consult a document outside of the RDA Toolkit that was not applicable. Another frustration for testers were the many LC-PCC PSs that instruct catalogers to consult Metadata Guidance documents without any indication of or link to the relevant MGDs.

For participants cataloging or evaluating music, video, or rare materials, they regularly commented where the LC-PCC PSs should be updated to include or refer to guidance from DCRMR: Descriptive Cataloging of Rare Materials (RDA Edition), OLAC Unified Best Practices, or MLA Best Practices. They also identified where LC/PCC practice was different from that of the specialized cataloging community.

Although some test participants expressed their appreciation for the LC-PCC Policy Statements, some indicated that they were confusing and unclear. For example, “LC/PCC Core” is used in many policy statements but is never defined, leading some testers to interpret it to mean that the element should always be recorded. There was confusion over what to do when the LC-PCC PS says to “Apply the option,” but the option was not applicable to the given situation. Furthermore, participants were unsure which options to apply when multiple options were appropriate and all had the same LC-PCC PS to “Apply the option.”

Metadata Guidance Documentation

Participants made 630 comments concerning the Metadata Guidance Documentation (MGDs). Merging similar comments resulted in the identification of 366 problems, of which 51 were resolved during the time period between the test and the analysis. Fourteen of the unresolved comments were identified as needing PCC policy decisions. Approximately 45% of comments concern issues related to the Manifestation entity (see Table 8). The second largest category was general comments that related to the MGDs in general or were connected to narrative MGDs not associated with a single RDA entity (e.g., Relationships between Agents and WEMI entities).

Table 8
MGD Comments: RDA Entity and General Comments

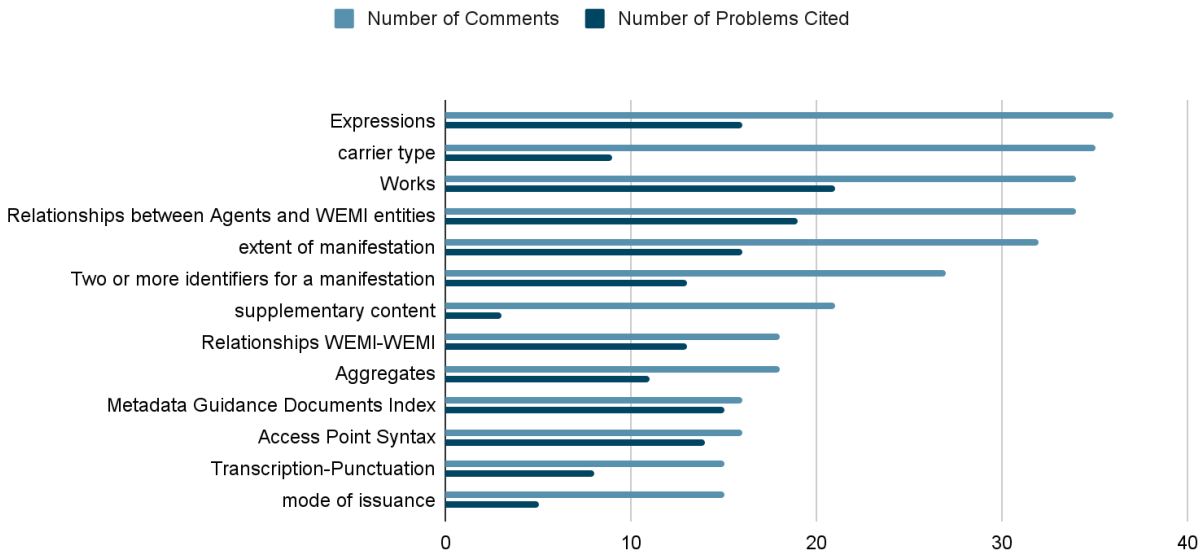
RDA Entity and General Comments	Number of Comments	Number of Problems Cited
Manifestation	286	139
General comments	167	121
Work	82	41
Expression	50	29
Person	16	11
Timespan	14	11
Corporate Body	12	12
Agent	2	1
Place	1	1
TOTAL	**630**	**366**

The MGDs that generated the most comments are those of Expressions, carrier type, Works, Relationships between Agents and WEMI entities, and extent of manifestation (see Table 9 and Chart 5).

Table 9
MGD Comments: Top MGDs

Metadata Guidance Document	Number of Comments	Number of Problems Cited
Expressions	36	16
carrier type	35	9
Works	34	21
Relationships between Agents and WEMI entities	34	19
extent of manifestation	32	16
Two or more identifiers for a manifestation	27	13
supplementary content	21	3
Relationships WEMI-WEMI	18	13
Aggregates	18	11
Metadata Guidance Documents Index	16	15
Access Point Syntax	16	14
Transcription-Punctuation	15	8
mode of issuance	15	5

Chart 5
MGD Comments: Top MGDs



Some participants struggled with the organization of the MGDs. They suggested that each individual MGD link back to the MGD landing page and RDA. The fragmented nature of MGDs made it difficult for participants to find information. For example, many struggled to find information about relationship labels because this information is found in three narrative MGDs and 54 separate documents listing labels. This led some testers to select the wrong MGD and record the wrong relationship label.

Testers and evaluators noted flaws in the titles of some MGDs. They remarked that some MGDs have identical or nearly identical titles, making it difficult to know if the reader is on the correct page. For instance, there are two documents that have the title “Additional elements and designations in authorized access point for corporate body”: one discusses corporate bodies; the other, conferences. Catalogers also expect titles of MGDs to be representative of their contents; however, some MGDs only cover partially what one expects to find. For instance, a tester remarked that the MGD for *language of expression* only covers bibliographic records, not authority records.

Participants remarked that the language used in MGDs differs at times from RDA terminology. For example, the RDA term “string encoding scheme” is called “access point syntax” in the MGDs. Such discrepancies in vocabulary can be confusing, hinder learning of new RDA terminology, and make it difficult for catalogers to find information. The fact that PCC decided to keep policies as close as possible to those of the original RDA Toolkit led to some inconsistencies between the official RDA Toolkit and MGDs. For instance, guidance about the manifestation element *colour content* appears in the Expressions MGD under the expression element *colour*, as it did in the original RDA Toolkit. These inconsistencies baffled some testers.

Some testers did not know that MGDs are based on original RDA LC-PCC Policy Statements; therefore, they expected to find more guidance than what the MGDs cover, and they looked in vain for MGDs that do not exist. For example, because there are narrative MGDs for Works and Expressions, catalogers expected to find one for Manifestations.

As expected, they also looked in MGDs for guidance on recording values in MARC and BIBFRAME. In some cases, the MGDs were extremely helpful, but in other cases, the guidance was either missing or insufficient, such as recording the language of cataloging in MARC 040 $b. Consequently, they requested additional MGDs, such as a narrative MGD for Manifestations that would cover the element *colour content*, and requested that additional examples be added to MGDs, especially for BIBFRAME.

Catalogers were frustrated when LC-PCC Policy Statements sent them to MGDs that only included policies that applied to LC or British Library staff. They wondered whether they should follow the instructions and examples. They also pointed out examples that do not fit current MARC definitions, such as the use of 520 $c in the Expressions MGD. Lastly, participants identified formatting issues, typographical errors, and broken links.

In the posttest surveys, respondents indicated that the Metadata Guidance Documentation was very useful and helped to make sense of the official RDA Toolkit. However, the quantity of MGDs and the inability to search across them were a major concern. This was partially resolved on August 1, 2023 by the inclusion of the MGDs in Classification Web Plus.

RDA Toolkit

While the test of the RDA Toolkit focused on LC-PCC Policy Statements and Metadata Guidance Documentation, participants were also asked to report problems related to the official RDA Toolkit. In addition, the posttest surveys asked where testers had difficulty interpreting official RDA. As a result, the test brought to light many issues specifically related to the official RDA Toolkit.

The evaluators' templates generated 530 comments pertaining to the RDA Toolkit itself. By combining similar feedback to reduce duplication, the number of problems was reduced to 417, 13 (3%) of which had already been fixed by the time of the analysis. More than half of the problems reported pertain to the entity Manifestation (see Table 10), with *title proper* and *extent of manifestation* being the elements that provoked the most comments (see Table 11 and Chart 6). The Guidance chapters on Data provenance and Guidelines on normalized transcription, and the Glossary were the other areas of the Toolkit where testers encountered the most issues (see Table 12 and Table 13).

Table 10
RDA Toolkit Comments: RDA Entity, Guidance, and Resources

RDA Entity, Guidance, and Resources	Number of Comments	Number of Problems Cited
Manifestation	266	203
Guidance (See Table 12)	75	60
Work	71	56
Resources (See Table 13)	43	40
Expression	37	24
Person	9	8
Corporate Body	8	8
Timespan	4	4
Agent	5	4
RDA Entity	1	1
TOTAL	**530**	**417**

Table 11
RDA Toolkit Comments: Top RDA Elements

RDA Element	Number of Comments	Number of Problems Cited
title proper	22	16
extent of manifestation	22	16
content type	15	8
date of publication	14	11
place of publication	13	9
name of publisher	12	7
statement of responsibility relating to title proper	11	9
statement of responsibility	11	5
title of manifestation	10	9
recording source	10	5
carrier type	10	6

Chart 6
RDA Toolkit Comments: Top RDA Elements

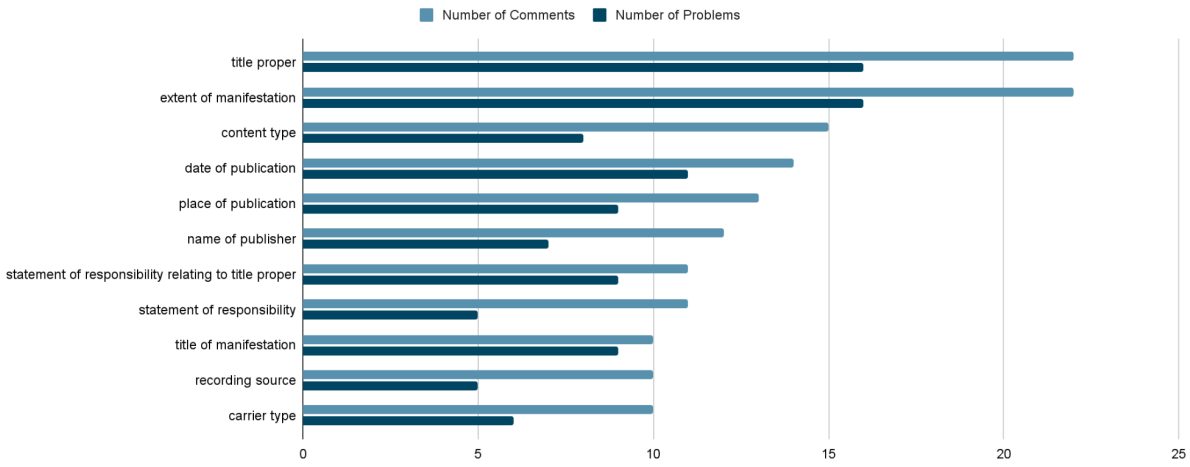


Table 12
RDA Toolkit Comments: Guidance Chapters

Guidance Chapter	**Number of Comments**	**Number of Problems Cited**
Guidelines on normalized transcription	25	15
Data provenance	18	16
Recording methods	9	9
Describing a manifestation	9	7
Describing a work	6	5
Data elements	2	2
Aggregates	2	2
Manifestation statements	1	1
Introduction to RDA	1	1
Entity boundaries	1	1
Effective description	1	1
TOTAL	**75**	**60**

Table 13
RDA Toolkit Comments: Top Resources

Resource	Number of Comments	Number of Problems Cited
Glossary	15	15
authorized access point for legal work: Anglo-American legacy instructions	6	4
Terms in English	4	4
preferred title of legal work: Anglo-American legacy instructions	3	3
Music Library Association Best Practices for title proper	2	1

During the analysis, comments on the RDA Toolkit were grouped into six categories:

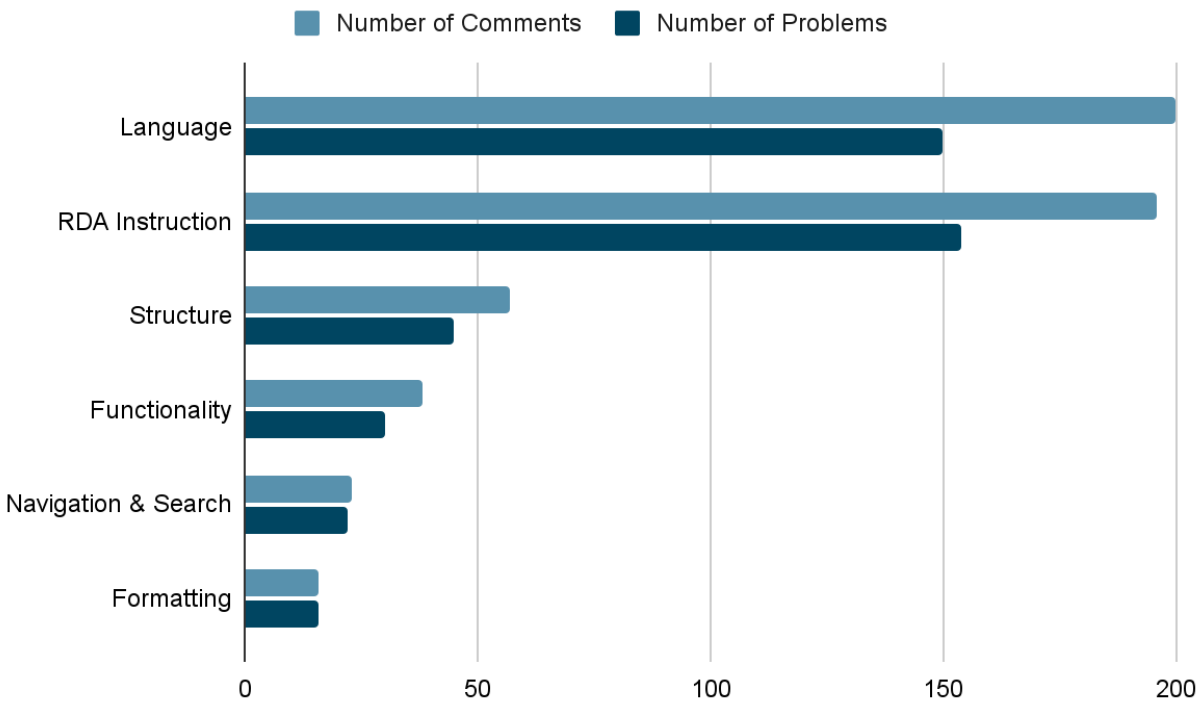
- Language
- RDA Instruction
- Structure
- Functionality
- Navigation & Search
- Formatting

Among these, the Language and RDA Instruction categories accounted for nearly three quarters of issues reported in evaluators' templates (see Table 14 and Chart 7).

Table 14
RDA Problems and Comments by Type

Problem Type	Number of Comments	Number of Problems Cited
Language	200	150
RDA Instruction	196	154
Structure	57	45
Functionality	38	30
Navigation & Search	23	22
Formatting	16	16
TOTAL	**530**	**417**

Chart 7
RDA Problems and Comments by Type



The Language category comprised comments on difficulties understanding RDA terminology, definitions, and instructions. It was also the most common problem category identified in the posttest surveys and in the evaluators' templates. Participants described the language of RDA as "dense," "incomprehensible," "laughably unclear and convoluted," and stated that the instructions are "difficult to decipher." A tester candidly remarked, "I don't understand what this word salad means," when referencing an instruction to record *other title information*. Participants were also appalled by some of the language choices that were made when redesigning the Toolkit. As an example, the term "aggregates" (with a lowercase "a") is used as the name of an RDA element, but the same term "Aggregates" (with an uppercase "A") is the title of a Guidance chapter. A finding of interest was that sometimes participants had trouble understanding the official RDA terms and language used in instructions, even though these were transferred directly from the original RDA Toolkit. An example is the term "named edition" which can be found in original RDA 2.5.6.1. Additionally, participants often noted that the lack of examples hindered their understanding of official RDA.

The RDA Instruction category includes comments reporting missing instructions, suggestions to reword the text of instructions, and identification of missing or erroneous MARC tags in the Element Reference sections. In addition, testers had trouble deciding which instruction to apply, which recording method to choose, and sorting through conditions and options. They wondered if they should "stop as soon as something fits" or if they should continue reading to apply more specific options. Many had problems finding which elements correspond to certain MARC fields

and subfields, most notably subfields $b and $2 in 33X fields. Participants suggested adding new instructions to the Toolkit, such as guidelines for capitalization of musical keys. They also proposed adding a few new elements to the Toolkit, like "'streaming media distributor agent' to distinguish between the theatrical film distribution and the streaming video."

While participants noted fewer issues related to Structure, Functionality, and Navigation & Search, their comments on these issues are nevertheless significant. Concerning the structure of the RDA Toolkit, participants reported issues related to the organization and hierarchy of the RDA Toolkit that affected their ability to locate and readily apply instructions. Testers had difficulty knowing where to start because there is no definitive starting point in the official RDA Toolkit. Some struggled when RDA instructions sent them in a circle, referring them to other instructions which in turn refer them back to the initial instruction. They did not feel comfortable having to look in many places or sort through instructions, conditions, and options. The proliferation of elements and their hierarchy caused bewilderment; so did the fact that some elements that are at the expression level in original RDA have been moved to the manifestation level in official RDA. Despite these problems, some testers and evaluators were able to identify areas where the structure of the Toolkit can be improved. For example, they suggested moving an RDA instruction to a different section and reorganizing a table of contents.

Comments related to Functionality include website features and various display issues, in particular those that impact viewing policy statements. Participants made suggestions to improve the Toolkit functionality. For instance, one evaluator asked, "Please make it so that clicking on a search result brings us DIRECTLY to the glossary term - no scrolling!! It gives me motion sickness."

The Navigation & Search category includes comments expressing difficulty or impossibility of finding relevant information while navigating or searching the RDA Toolkit. Testers described their search strategies, such as using keywords, phrases in quotation marks, and MARC fields and subfields. They pointed out problems with search results. Some wondered how they ended up where they were, while others mentioned not being able to find an RDA instruction they had found earlier. As a tester colorfully commented: "some of the routes to the instructions … were long and winding."

The last category of comments, Formatting, included 16 comments about typos, missing links, and layout issues that should easily be corrected.

BIBFRAME and Sinopia

The PCC test of the official RDA Toolkit included four testers creating BIBFRAME descriptions for print and electronic books, serials, and videodiscs in Sinopia. Since comments from the BIBFRAME testers and evaluators relating to the LC-PCC Policy Statements (LC-PCC PSs), the Metadata Guidance Documentation (MGDs), and the RDA Toolkit are included in the above sections of this report, this section discusses aspects that are specific to BIBFRAME and Sinopia.

The evaluation of BIBFRAME records resulted in 1000 comments, of which 472 directly referenced BIBFRAME or Sinopia. As with the other results, comments on the Manifestation entity were the most prominent, accounting for 308 comments or 65% of all BIBFRAME and Sinopia comments (see Table 15). Guidance chapters received 74 comments, while the Work and Expression entities had 39 and 36 comments respectively. There were 9 other comments that related directly to BIBFRAME or Sinopia and not RDA.

Table 15
BIBFRAME and Sinopia Comments: RDA Entity, Guidance, Resources

RDA Entity, Guidance, Resources	**Number of Comments**	**Number of Problems Cited**
Manifestation	308	114
Guidance (see Table 17)	74	12
Work	39	30
Expression	36	16
Other	9	7
Place	3	3
Corporate Body	2	2
Person	1	1
TOTAL	**472**	**185**

The Sinopia templates, and BIBFRAME overall, were not updated for official RDA prior to the test; consequently, many comments point out discrepancies between the Sinopia templates and official RDA.

The element *mode of issuance* received the most comments with 42 comments on 11 problems (see Table 16). The definition changed so that *mode of issuance* in the official RDA Toolkit indicates whether the manifestation is issued in one or more units; it no longer includes the way the resource is updated and whether its termination is predetermined or not. The MGD reflects how *mode of issuance* was recorded in original RDA and does not provide guidance for recording *mode of issuance* according to official RDA in MARC or BIBFRAME. Moreover, the

BIBFRAME class bf:Issuance and property bf:issuance are based on the original RDA Toolkit definition; it is unclear if: (1) the existing class and property can be used to record the more narrowly defined *mode of issuance*, (2) the class and/or property should be redefined to match the new definition, or (3) a new BIBFRAME class and/or property should be created. The LC vocabulary encoding scheme Issuance (http://id.loc.gov/vocabulary/issuance.html), which is used in the Sinopia templates, is also based on the original RDA Toolkit and has not been updated for official RDA. The discrepancy between the terms in the LC vocabulary encoding scheme and the RDA Mode of Issuance vocabulary encoding scheme caused confusion for testers.

Testers also expressed confusion with the elements *illustrative content*, *supplementary content*, and *colour content*. These elements changed from Expression elements in original RDA to Manifestation elements in official RDA; however, the Sinopia templates have not been updated to move them from the BIBFRAME Work templates to the BIBFRAME Instance templates.

When recording a structured description for *illustrative content*, it is unclear how to apply the option to "Record a term in the singular or plural, as applicable." The RDA Illustrative Content vocabulary encoding scheme only includes terms in the singular, while the LC vocabulary encoding scheme Illustrative Content (http://id.loc.gov/vocabulary/millus) only includes terms in the plural. Some testers used this difference to justify their choice of vocabulary encoding scheme; other testers disregarded the LC-PCC Policy Statement to use terms from the RDA vocabulary encoding scheme and used terms from the LC vocabulary encoding scheme because the LC terms were included in the Sinopia templates.

In the official RDA Toolkit, the element *supplementary content* can be recorded using all four recording methods: unstructured description, structured description, identifier, and IRI. The Sinopia templates consider these different recording methods and include lookups to record terms from the LC vocabulary encoding scheme Supplementary Content (http://id.loc.gov/vocabulary/msupplcont). Unfortunately, the guidance in the MGDs assumes that the value is recorded as an unstructured description and provides no guidance for using other recording methods and whether they should be used instead of, or in addition to, the unstructured description.

During the evaluation period of the test, the Sinopia templates were updated to change how publication information was recorded. At the time of the test, Place of Publication and Publisher contained lookups with the option to record a literal value. After the templates were updated, Place of Publication and Publisher's Name could only be recorded as literal values; if a linked value for the publisher's name was desired, catalogers were instructed to use bf:Contribution instead. Although the official RDA Toolkit provides instructions for recording *place of publication* using all four recording methods, *name of publisher* can only be recorded as an unstructured description. Removing the lookup and forcing a literal value for these elements was appropriate. In addition, using bf:Contribution to record a linked value for the publisher is consistent with the relationship element *publisher agent*, a relationship between a manifestation and an agent, for which PCC policy prohibits using an unstructured description.

Table 16
BIBFRAME and Sinopia Comments: Top RDA Elements

RDA Element	Number of Comments	Number of Problems Cited
mode of issuance	42	11
illustrative content	30	10
supplementary content	28	7
media type	23	6
place of publication	21	11
colour content	21	9
content type	20	4
carrier type	20	6
publisher corporate body	19	4
publication statement	14	4
file type	13	3
work manifested	12	2
title proper	10	5
identifier for manifestation	7	6
extent of manifestation	7	4

Of the Guidance chapters, those on Data provenance and Recording methods received the most comments (see Table 17).

The Sinopia templates include Administrative Metadata, including Cataloger ID, Date Cataloged or Updated/Changed, Cataloging institution, Description Conventions, and Language of Cataloging. The official RDA Toolkit includes instructions in the Data provenance Guidance chapter for recording these elements, but they were frequently omitted from the testers' templates.

All comments on the Recording methods guidance chapters were related to an LC-PCC PS that states, "In most cases, prefer RDA vocabularies in bibliographic descriptions in general cataloging." This policy statement is consistent with those policy statements on the various element pages that say to apply the option to record a term from the appropriate RDA vocabulary encoding scheme. The Sinopia templates do not follow these policy statements because there are no lookups to record values from the RDA vocabulary encoding schemes;

instead, the Sinopia templates use lookups to record values from the LC vocabulary encoding schemes available on id.loc.gov.

Table 17
BIBFRAME and Sinopia Comments: Guidance Chapters

Guidance Chapter	Number of Comments	Number of Problems Cited
Data provenance	41	6
Recording methods	28	1
Describing a work	4	4
Describing a manifestation	1	1
TOTAL	**74**	**12**

Overall, some testers felt that working in BIBFRAME and Sinopia was easier than working in MARC 21 because of the division between the BIBFRAME Work and Instance. While the BIBFRAME Instance corresponds with the RDA Manifestation entity, testers found the conflation of the BIBFRAME Work with the RDA Work and Expression entities very confusing. For example, when elements could be recorded to describe the work or the expression (e.g., *preferred title of work* versus *preferred title of expression*), testers were unsure which element to use and sometimes alternated between them.

Additional Results

The final section of the results concentrates on highlighting areas where testers did not use the Toolkit effectively, either by missing information or by making errors in their choice of elements or options. The testers' and evaluators' comments made it possible to find general trends and identify problematic areas.

Information Missed by Testers

The evaluation of the test showed that, across the spectrum, testers seem to have consistently missed various crucial pieces of information as they were cataloging. There could be three main explanations for this: (1) testers ignored the steps because they relied on their existing cataloging knowledge, so automatically skipped some instructions; (2) they may have consulted some of the information but forgot to mention it in their template; or (3) they looked for the information, but failed to find it due to difficulty navigating the Toolkit and/or following instructions. The omissions, however, highlighted some areas which could be addressed through training to support catalogers in their application of the official Toolkit.

From Table 18, the main areas which were missed by the testers were access points, Manifestation elements, Guidelines on normalized transcription, and Data provenance.

Table 18
Top Information Missed by Testers

Information Missed	Number of Occurrences
Access points	139
Manifestation elements	115
Guidelines on normalized transcription	55
Data provenance	50
Relationship elements	28
Nomens and appellations	28
Extent	27
VESs	22
Aggregates	14
Navigating between documentation	13
Domain	11
Recording titles	11
Recording methods (identifier)	10
Effective/Minimum description (core elements)	9
Recording methods (unstructured description)	8

In terms of access points, it was noticed that testers tended to miss selecting the right element and domain; for Manifestation elements, testers often missed an instruction and/or followed the wrong options. Testers often failed to locate data provenance information and expressed frustration as they knew it had to be found somewhere. Guidelines on normalized transcription were consistently missed; however, this might be due to testers feeling it was not necessary to record. As is highlighted in other parts of the report, relationship elements were another big area which confused testers.

Errors

As already mentioned, testers were asked to “show their work,” naming the elements they used and citing the exact instructions they applied. This helped evaluators analyze significant cataloging errors (that is, errors other than typos). When significant cataloging errors were

identified, evaluators assessed whether the tester was using the wrong element or following the wrong instruction for the right element. Either one of these missteps could lead to an incorrect value in the cataloger's descriptions.

By far, the most commonly identified source of errors was the misapplication of conditions and options from the Toolkit. Of the errors flagged during the analysis as probable training issues, approximately 20% were attributed to the tester selecting an inappropriate condition or option for their situation. For example: "The next PS explicitly applies to currently-published print serial works, so the tester should have applied it instead of the one they chose."

The next most common set of errors was related to the element hierarchy in RDA. Testers frequently selected broad, general elements when narrower, more specific elements were more appropriate. For example: "Tester cited element recorded as *name of agent of manifestation*. It should have been *name of producer*." Even among evaluators, there was uncertainty about whether catalogers should start by consulting instructions for the broader or narrower elements. Evaluator A: "It might be helpful to train catalogers to start with the instructions for the specific element being recorded and then consult the broader element for more general instructions" and Evaluator B: "Shouldn't the tester have navigated from Work: *creator agent of work* to Work: *author agent* to Work: *author person*?"

The third most common set of errors was related to understanding WEMI, agents, and domain and range. There was a considerable amount of confusion about when to use WEMI instructions versus Agent instructions. For example, an evaluator commented that the tester should have used the element Entities > Manifestation > *publisher corporate body* rather than Entity > Corporate Body > *authorized access point for corporate body*, as the latter is only used for authority descriptions. As another example: "Tester should have recorded *name of publisher* as the element [transcribed in MARC 264 $b] instead of *publisher agent* [which PCC represents with an access point]." Incorrect use of inverse elements also indicated that testers did not fully grasp domain and range: "Applied element *ISSN of* instead of *ISSN*."

Recommendations

Prior to the release of this report, the task group submitted actionable requests and general comments from the test results to organizations that can enact or effect changes in the PCC documentation, namely the PCC Policy Committee (PoCo) and the Policy, Training, and Cooperative Programs Division (PTCP) at the Library of Congress. In addition, feedback on the official RDA Toolkit was submitted to the North American RDA Committee (NARDAC).

Therefore, the recommendations in this report tend to be more general or overarching. For example, recommendations to update a single LC-PCC PS are not included here. Moreover, further work may be required during and after implementation to resolve problems not identified during the test.

LC-PCC Policy Statements and Metadata Guidance Documentation

On July 18, 2023, the task group submitted the test results for the LC-PCC Policy Statements (LC-PCC PSs) and Metadata Guidance Documentation (MGDs) to the PCC Policy Committee (PoCo) and the Policy, Training, and Cooperative Programs Division (PTCP) at the Library of Congress for further action.

The primary document submitted was a spreadsheet of actionable recommendations, questions, and comments from testers, evaluators, and task group members. The spreadsheet contained 625 entries concerning the LC-PCC PSs and 366 entries for the MGDs. A brief summary report accompanied the spreadsheet to provide background information, highlight issues that stood out to the task group during data analysis, and recommend some possible solutions.

Comments in the spreadsheet represented the views of testers, evaluators, and task group members. Both substantive suggestions and general comments were included. Some comments were marked as “resolved” by the task group; these were typically for typos and broken links that have already been corrected.

The task group agrees with many, if not most, of the recommendations from participants. Some examples include:

- Make more direct links from LC-PCC PSs to specific MGDs.
- Provide a list of PCC core elements and an MGD explaining what “core” means.
- Improve MGD searchability.
- Create a reference document for MARC encoding.
- Determine a maintenance plan for the Anglo-American legacy instructions (particularly legal materials); consider turning these into MGDs.

While there was a remarkable amount of consensus among the participants, they did not agree on everything. Thus, proposed solutions in the spreadsheet occasionally contradict each other, and parallel problems do not always have parallel proposed solutions. Parallel problems occur due to the use of boilerplate language throughout the Toolkit. One or more occurrences of these repeated policy statements may have been identified in the spreadsheet, but the task group did not methodically seek out and identify every related policy that would need to be updated.

The summary of recommendations and policy decisions accompanying the spreadsheet highlighted some of the problems that frequently occurred during the test and may have a significant impact on LC-PCC PSs and/or MGDs. For each problem, the task group proposed at least one recommended resolution. When appropriate, the task group also identified policy decisions that should be made in order to fully resolve problems. It is expected that PTCP and PoCo will review the recommendations and potential policy decisions, then make the best decisions for how to proceed, which may be different from what the task group recommended.

Recommendations and policy decision points were related to vocabulary encoding schemes, recording relationship elements as unstructured descriptions, relationship labels, linking MGDs in LC-PCC PSs, and guidance and best practices from other cataloging communities.

Task group recommendations sent to PoCo and PTCP were as follows:

1. Treat the RDA vocabulary encoding schemes and the lists from the Library of Congress (including those on id.loc.gov) as separate but equally valid vocabulary encoding schemes.

   Policy decision needed: Does LC/PCC prefer terms, identifiers, and URIs from the RDA vocabulary encoding schemes or those from the Library of Congress (including those on id.loc.gov)?

2. Update the LC-PCC PS for recording a VES used as a source of information,
   from:
   LC/PCC practice: Do not apply the option unless specifically required by policy or the metadata system.
   to:
   LC/PCC practice: Apply the option if required by Metadata Guidance documentation: _____.

   Clarify policy as part of an appropriate MGD, including guidance for applying the option by specifying the vocabulary encoding scheme and the corresponding source code.

3. If LC/PCC policy is to not record a relationship element as an unstructured description, indicate in the LC-PCC PS for the element which alternative elements could be used to record an unstructured description.

   Policy decision needed: Can relationship elements be recorded using an unstructured description in PCC records?

4. Include the PCC relationship label directly in the LC-PCC PS for the element.

5. If not feasible to include the PCC relationship label in the LC-PCC PS, link directly to the one applicable MGD in the LC-PCC PS for the element.

6. Consider alternative approaches to the presentation of PCC relationship labels (e.g., a single document to allow for easier searching or a table to allow for filtering by different properties).

7. Although testers would like the 1:1 MGDs in Prerecording, the task group does not recommend this practice because the MGDs in Prerecording cover general instructions and 1:1 MGDs typically cover specific recording instructions.

8. LC-PCC PSs should direct catalogers to MGDs applicable to the RDA element. It is up to the cataloger to determine if the MGD is applicable to their situation.

9. Not all situations need to be documented in an MGD. Catalogers should use judgment if no guidance is included in an MGD for less common situations.

10. Whenever possible, include links to the specific MGDs that should be consulted instead of a statement to see Metadata Guidance documents.

11. PCC practice does not need to align with practices of specialized cataloging communities.

12. Assume that catalogers will consult documentation of specialized cataloging communities (e.g., DCRMR, MLA BP, OLAC BP) without LC/PCC having to explicitly say so in the LC-PCC PSs.

In addition to the 12 recommendations already sent to PoCo and PTCP, the task group also recommends the following:

13. Align PCC policies and documentation more closely to official RDA, including using language from the official RDA Toolkit in LC-PCC PSs, MGDs, and training documentation.

14. Develop a timeline to evaluate elements that are marked with the LC-PCC PS “LC/PCC practice: Do not record the element. The element will be evaluated for use at a future time.”

15. Develop an introduction to the LC-PCC PSs, either as an MGD or in the RDA Toolkit.
    a. Clearly define LC/PCC Core elements as those that are applicable and readily ascertainable.
    b. Provide guidance for applying the LC-PCC PSs.

PTCP will be considering the task group’s feedback and working on changes through the end of 2023 and possibly into early 2024. The task group recommends that PTCP follow up with the PCC community upon completion of their work by submitting a report to the PCC Policy Committee.

RDA Toolkit

Early on, the task group realized that RDA Toolkit issues identified during the test and its analysis could help the RDA Steering Committee (RSC) improve the official RDA Toolkit. Therefore, with permission from the PCC Policy Committee (PoCo), a spreadsheet of 417 comments related to the RDA Toolkit was shared with the North American RDA Committee (NARDAC) on August 25, 2023. Prior to doing so, the task group marked 124 (32%) comments as “Priority.” They include:

- straightforward changes;
- suggestions to improve consistency in wording or structure;
- feedback on functionality issues that affect users’ ability to find, retrieve, or view instructions or policy statements; and
- significant concerns that should be addressed.

The 293 comments not marked as “Priority” include those that:

- are in the process of being addressed (e.g., adding examples);
- are based on implementation decisions (e.g., which instructions or options to apply);
- can be addressed through training (e.g., explaining how to read an instruction);
- suggest changes to instructions or terminology that were transferred from the original RDA Toolkit (e.g., named edition);
- are complex, complicated, or contentious (e.g., complete overhaul of the language of RDA); or
- have been resolved since the PCC test.

The task group recommended that all comments, including those not marked as “Priority,” be reviewed by NARDAC and the RSC. They also suggested that comments be sent to relevant RSC working groups. For instance, comments relating to extent elements should be reviewed by the RSC Extent Working Group.

The task group recommends that NARDAC follow up with the PCC community upon completion of their work by submitting a report to the PCC Policy Committee.

BIBFRAME and Sinopia

The recommendations for BIBFRAME and Sinopia are divided into two sections: “Updates to the Sinopia Templates” and “Additional BIBFRAME Guidance Requested.”

Updates to the Sinopia Templates

The following Sinopia templates were used during the test:

- _PCC BF2 Instance (Monograph) (pcc:bf2:Monograph:Instance)
- _PCC BF2 Work (Monograph) (pcc:bf2:Monograph:Work)
- _PCC BF2 Instance (Serial) (pcc:bf2:Serial:Instance)
- _PCC BF2 Work (Serial) (pcc:bf2:Serial:Work)
- _ Stanford BF2 Instance (Moving Image Video) (Stanford:bf2:MovingImageDVD:Instance)
- _Stanford BF2 Work (Moving Image Video) (Stanford:bf2:MovingImageDVD:Work)

Based on the test, the task group recommends the following changes to the Sinopia templates:

1. Move the following elements from bf:Work to bf:Instance because they describe a manifestation in official RDA:
    - Accessibility content
    - Colour content
    - Illustrative content
    - Sound content
    - Supplementary content

2. Move the following element from bf:Instance to bf:Work because it describes a work in official RDA:
    - Frequency

3. If PCC policy continues to prefer the RDA vocabulary encoding schemes over other appropriate vocabulary encoding schemes, such as those from the Library of Congress available from id.loc.gov, include a lookup for the appropriate RDA vocabulary encoding scheme. This includes the following elements and many others:
    - Carrier type
    - Content type
    - File type
    - Frequency
    - Illustrative content
    - Media type
    - Mode of issuance
    - Sound content

4. Where the Sinopia templates use RDA terminology, reflect the terminology used in the official RDA Toolkit. Some suggestions are included in Table 19.

Table 19
Updates to Sinopia Templates: Labels

Current Label in Sinopia	Suggested Label in Sinopia
Work & Instance	
Relationship Designator	Relationship Label
Work	
Preferred Title for Work	Preferred Title of Work
Variant Title for Work	Variant Title of Work
Place of Origin of the Work	Place of Origin of Work
Language	Language of Expression
(Geographic) Coverage of the Content of the Resource	Coverage of Content (Geographic)
(Time) Coverage of the Content of the Resource	Coverage of Content (Chronological)
Intended Audience	Intended Audience of Expression
Note about the Work	Note on Work
Summary	Summarization of Content
Form of Work	Category of Work
Instance	
Year of Publication	Date of Publication (Structured Description)
Date of Publication	Date of Publication (Unstructured Description)
Note about the Instance	Note on Manifestation
Extent	Extent of Manifestation

5. In both Work and Instance templates, include an option to record related expressions using the BIBFRAME property bf:relatedTo. This is the recommended property when describing aggregates, but the current Instance templates only include options for recording related manifestations.

6. Include additional guidance in the templates for recording the element *note on issue or part or iteration used as basis for identification of manifestation*. For example, in the Instance template for serials, include separate property templates for the “Description based on” and “Latest issue consulted” notes.

7. Allow Frequency and Relationship Designators to be recorded as literal values when an appropriate term is not available in the vocabulary encoding scheme.

8. Include the property bf:noteType in note fields.

Additional BIBFRAME Guidance Requested

To support catalogers working in BIBFRAME, test participants requested adding more guidance in the PCC documentation for the following:

- Relating bf:Work and bf:Instance
- Choice of vocabulary encoding schemes
- Describing aggregates
- Recording the following elements:
    - *title of expression* and *preferred title of expression*
    - *statement of responsibility*, particularly if more than one statement of responsibility should be entered as separate values or as a single value separated using ISBD punctuation
- Clarifying which URIs represent an IRI for the term or concept as a real-world object

Some participants also requested that MGDs specifically for BIBFRAME be created instead of combining MARC and BIBFRAME guidance in the same MGD. They would also like to see mappings of RDA elements to BIBFRAME.

Training

The test identified specific areas that will require additional training. Based on the 355 comments received, the training recommendations were divided into ten broad categories:

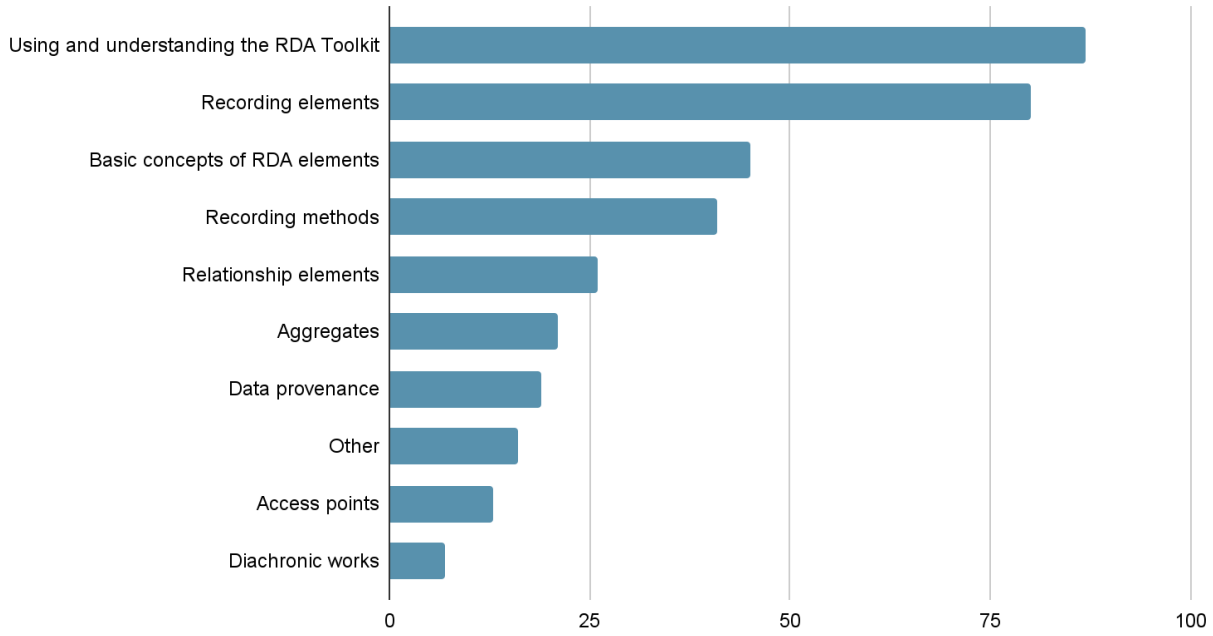
1. Using and understanding the RDA Toolkit
2. Recording elements
3. Basic concepts of RDA elements
4. Recording methods
5. Relationship elements
6. Aggregates
7. Data provenance
8. Other
9. Access points
10. Diachronic works

The number of comments received for each category is provided in Table 20 and Chart 8.

Table 20
Number of Comments per Training Category

Training Category	Number of Comments
1. Using and understanding the RDA Toolkit	87
2. Recording elements	80
3. Basic concepts of RDA elements	45
4. Recording methods	41
5. Relationship elements	26
6. Aggregates	21
7. Data provenance	19
8. Other	16
9. Access points	13
10. Diachronic works	7

Chart 8
Number of Comments per Training Category



1. Using and understanding the RDA Toolkit

Comments from the test revealed that training needs to focus on the basics of understanding the RDA Toolkit, especially the WEMI entities and RDA terminology. It was clear from the test that some catalogers had no idea where to start in the Toolkit; to some degree, this may have been due to difficulties in comprehending the terminology. Other testers were unsure how to interpret RDA instructions and apply the various conditions or options.

Determining how to apply RDA in MARC should also be addressed. For example, one evaluator commented that because there are so many manifestation elements related to publisher, training and documentation will need to be explicit about which instructions to follow. One tester commented that they were “running in a circle, looking for the correct element [and reaching] dead end[s].” This lack of understanding also extended to interpreting the LC-PCC Policy Statements (LC-PCC PSs), so that will also have to be covered during training.

The test revealed that there was a difference between navigating and searching the Toolkit. Searching involves using the search box in the Toolkit, whereas navigating includes moving through the toolbar, drop down menus, breadcrumbs, and expand/collapse boxes of the Toolkit. This also includes navigating among the LC-PCC PSs, the Metadata Guidance Documentation (MGDs), and the Toolkit.

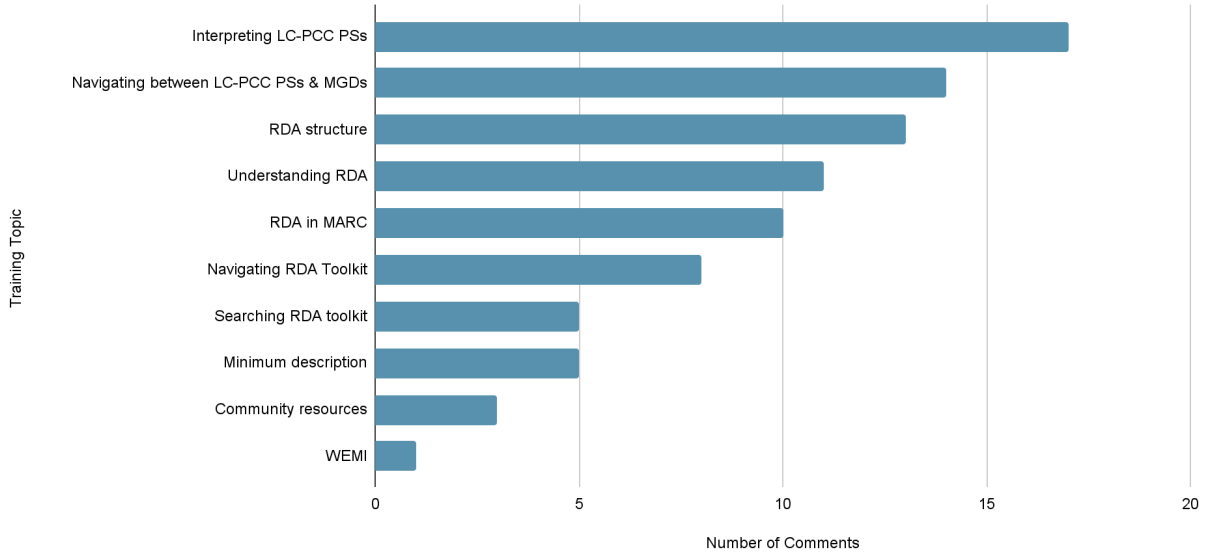
Navigating the RDA Toolkit came up as an area of confusion for many testers. In particular, the “Send to Back” function caused issues, especially when the policy statements are lengthy and

stacked on top of each other. Visually determining which policy statement lines up with which instruction or option also caused some confusion.

Some testers also found it challenging to search the Toolkit. In the training, it will be advantageous to include directions for how to best search the Toolkit, with instructions for how to easily locate MARC field information.

Refer to Chart 9 below for the number of comments received about each training topic within the category of Using and understanding the RDA Toolkit.

Chart 9
Using and Understanding the RDA Toolkit: Number of Comments per Training Topic

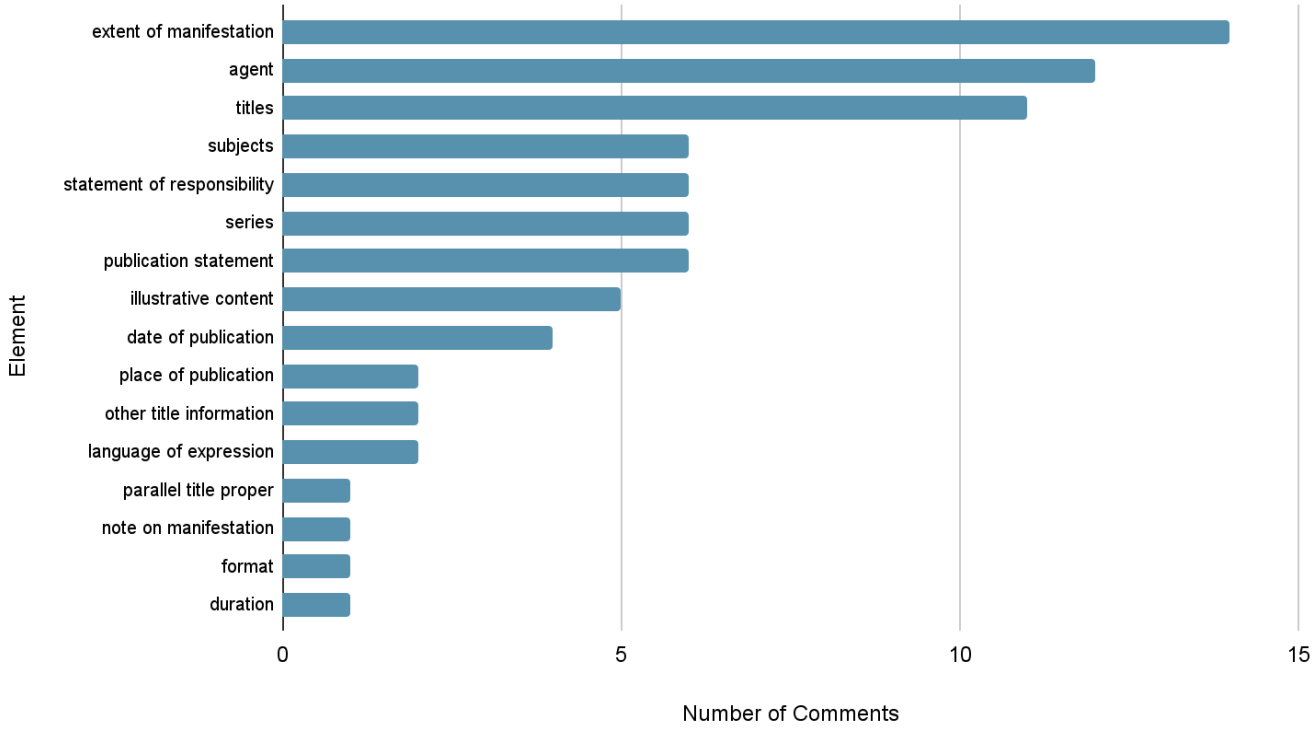


2. Recording elements

Questions about how to record elements came up frequently throughout the test. A few examples include *title proper*, *statement of responsibility*, *extent of manifestation*, *publication statement*, and *agent*. One evaluator commented that "the tester was unclear which instructions to consult first and was confused when the instructions seemed to be sending them in circles." From this comment, as well as from many others, it is clear that it will be beneficial to train on how to interpret an element page from top to bottom starting from the Definition and Scope, to the Element Reference section, Prerecording and Recording sections, the View in Context Example (if available), right down to the Related Elements section at the bottom of the page. Understanding when to apply vocabulary encoding schemes for elements, such as for the element *language of expression*, and where to locate the recommended vocabulary should also be covered.

Chart 10 shows which elements were commented on most frequently, as well as the number of comments received per element. Note that some elements have been combined together. For example, *title proper* and *preferred title of work* are both combined under “titles”.

Chart 10
Recording Elements: Number of Comments per Element



3. Basic concepts of RDA elements

In addition to recording elements, testers had difficulty understanding the basic concepts of RDA elements. In particular, the element hierarchy was confusing to some testers. Knowing when to consult the broader element versus the more specific element came up frequently as an issue, for example, when to apply *appellation of work*, *title of work*, or *preferred title of work*.

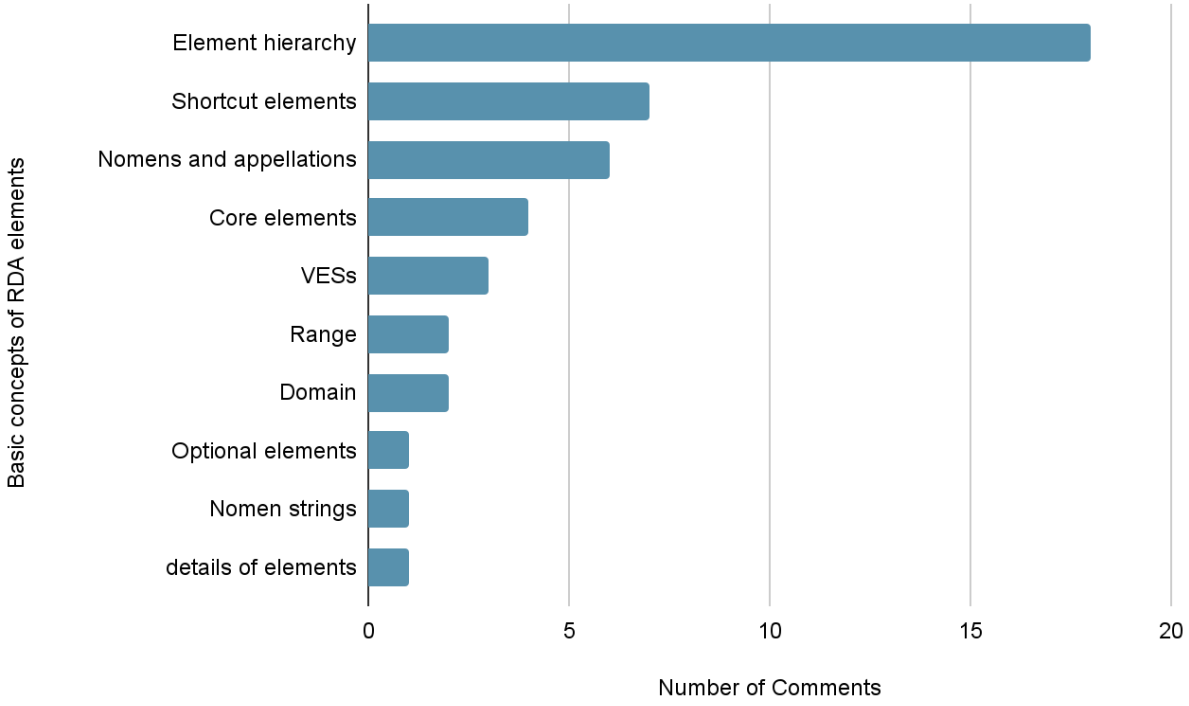
How to recognize a shortcut element is important to include in training, as a few testers ended up going in circles through the Toolkit when trying to record the correct element. In particular, some evaluators commented that there was confusion about when to record *name of publisher* versus *publisher agent*.

Several evaluators also noted that additional training should be provided on how to locate and identify the PCC Core elements in the Toolkit. Training should also include Nomens and appellations, as well as domain and range. One tester commented: “What is an instance of a nomen and how does it differ from a value of a nomen string?” Another tester commented: “Does appellation mean authorized form and name means unofficial or variant form?” As

already mentioned for the training category “Recording elements,” another focus for training should include when to use a vocabulary encoding scheme and where to locate the recommended vocabulary.

Chart 11 shows the most frequently commented on basic concepts of RDA Elements and the number of comments received per each concept.

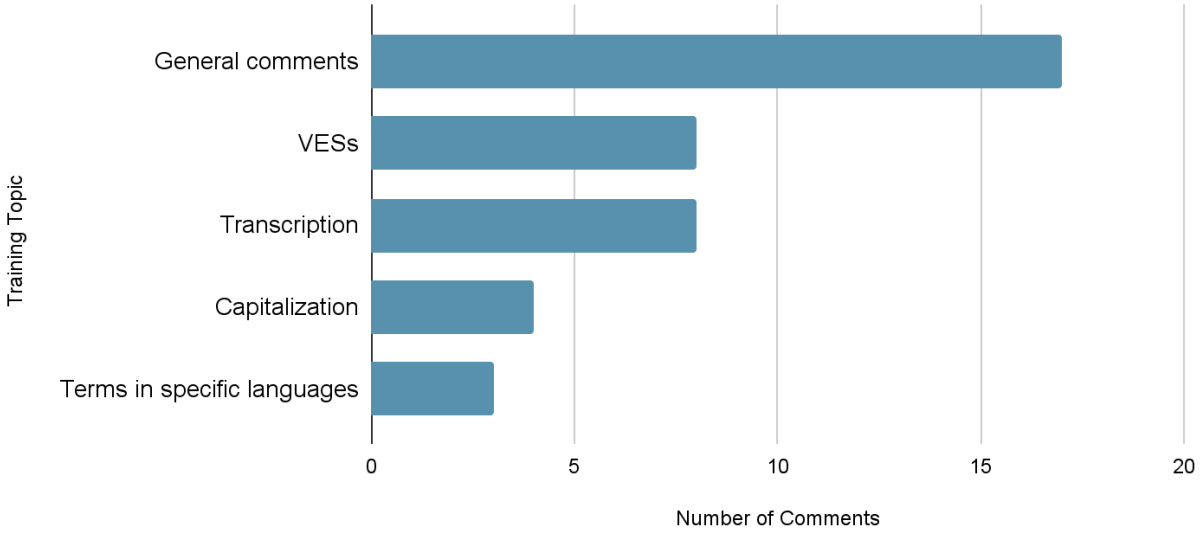
Chart 11
Basic Concepts of RDA Elements: Number of Comments per Concept



4. Recording methods

The four different recording methods need to be addressed during training. In particular, evaluators commented that there is confusion between structured versus unstructured descriptions and which transcription guidelines and/or string encoding schemes should be followed (see Chart 12). One tester noted that they were unsure if the first option for recording a structured description for *publication statement* (“Record a structured description by applying a string encoding scheme …”) referred to ISBD punctuation or something else. In addition to training for the recording methods, it is important to provide training on where to locate the Community Resources and, in particular, where to locate the terms in specific languages and the capitalization rules.

Chart 12
Recording Methods: Number of Comments per Training Topic



5. Relationship elements

Recording relationship elements was an area that came up frequently as requiring additional training. Many testers had difficulty understanding how to record the relationship elements and, in particular, were unsure where to locate the appropriate relationship labels to use with their access points. Navigating through the list of MGDs for relationship labels in order to find the correct PCC relationship label to use proved difficult for many testers. As one tester commented: “I’m not sure if I understand correctly, but the “labels” in the MGD documents are supposed to be the actual values we’re supposed to record in the subfield e for personal authorized access points?” In addition, defining when to use the inverse element will be important to include as part of the training. For instance, one tester was unsure when to use *author person* or the inverse *author person of*.

The relationship elements that received the most comments are as follows:

- *actor person*
- *aggregator person*
- *arranger person of music*
- *artist person*
- *author person*
- *compiler person*
- *composer person of work*
- *creator person of expression*
- *issuing corporate body*

6. Aggregates

Another area for training should focus on aggregates. Evaluators commented that some testers struggled with the three kinds of aggregate manifestations and how to locate the relevant LC-PCC PSs and MGDs. Because aggregates are a new concept for official RDA, several evaluators recommended that this area be thoroughly presented during training.

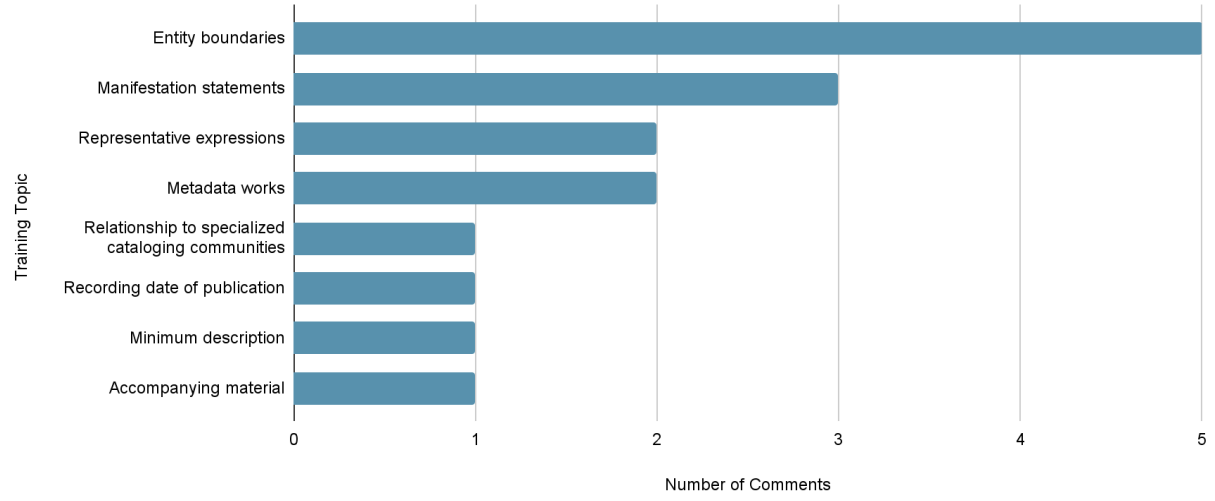
7. Data provenance

Locating the Data provenance guidance was problematic for some participants, with one evaluator commenting that it was unclear how to locate the instructions regarding source of information when a cataloger starts at the top of the page for the element *title proper* and the data provenance information is located much further down the page. Some testers were also unsure where to locate “source of information” and did not realize that Data provenance was the section to find this type of information.

8. Other

Other areas that should not be missed in training are manifestation statements, metadata works, entity boundaries, and representative expressions. Refer to Chart 13 below for a complete list of other areas to be included in training.

Chart 13
Other: Number of Comments per Training Topic



9. Access points

Constructing access points is another area that will require training. Evaluators commented that some testers did not know where to find guidance on constructing access points, and confusion occurred between elements, for example, *access point for corporate body* and *authorized access point for corporate body*. When constructing some access points, in particular for legal

works, it is also necessary to consult the Anglo-American legacy instructions. Testers had difficulties locating these legacy instructions in the Toolkit.

10. Diachronic works

From the serial and integrating resource descriptions that were created for the test, it is clear that there will need to be targeted training for diachronic works. Training should include the two types of diachronic works, transformation boundaries, and the WEM lock. Testers had difficulty determining which method, accumulation or replacement, was intended to extend the content. One tester commented that they were unable to locate the specific LC-PCC PS that provided instructions on how to record the volume and numbering designation. This tester eventually gave up their search and resorted to consulting the CONSER Cataloging Manual.

In addition to collecting ideas for training areas by reviewing participants' comments, the task group developed training suggestions by analyzing the cataloging errors reported by evaluators. Errors made by testers confirm that it would be helpful to have training on conditions and options, element hierarchy, domain and range, vocabulary encoding schemes, manifestation notes, relationship labels, series elements, difference between names and access points, inverse elements, and WEMI in general.

The analysis of the test also collated comments on information missed by testers that brought up salient areas which should be addressed during training. These areas for training are consistent with the areas that have already been recommended. Table 21 below shows a breakdown of these areas by RDA entity and guidance and includes the number of comments received per RDA entity or guidance.

Table 21
Training based on Information Missed by Testers

RDA Entity or Guidance	***Training Categories***	**Number of Comments**
Manifestation	• recording methods • recording extent of manifestation • RDA structure • navigating between documentation • interpreting LC PCC PSs • element hierarchy • data provenance • aggregates • understanding RDA • VESs • shortcut elements • relationship elements	160

RDA Entity or Guidance	*Training Categories*	Number of Comments
	• recording titles • statements of responsibility • series • publication statement	
Work	• relationship elements • element hierarchy • access points • recording creators • recording subjects • titles • minimum description • RDA in MARC	70
Expression	• relationship elements	40
Guidance	• data provenance • sources of information • transcription	27
Corporate Body	• access points • recording creators	18
Agent	• access points	8

Regarding the types of training to offer, some testers and evaluators suggested that training for cataloging various formats be available via both online and in person workshops. In addition, providing documentation on hierarchy (e.g., *place of manifestation* includes *place of production*, *place of publication*, *place of manufacture*, etc.) and which elements to include would go a long way in helping PCC participants and the cataloging community at large to understand and adopt RDA.

Implementation

In the posttest survey, participants were asked for suggestions that will help with the implementation process. One of the primary suggestions was to have a phased implementation, with early adopters providing additional feedback on the PCC documentation. Some participants also recommended that training and implementation need to be close together, and implementation could be phased by format. Collaboration with MLA, OLAC and other communities was recommended.

One participant suggested that public relations efforts are needed to remind catalogers that the official Toolkit is not meant to be a standalone resource; it needs to be used in conjunction with other tools, such as application profiles and policy statements.

The posttest survey also asked participants to indicate which issues need to be addressed before implementation and which can be addressed after. Responses repeated themes found in the testers' and evaluators' templates, especially requests for application profiles, best practices, and lists of core requirements.

Before Implementation

When asked what they think PCC needs to do before implementation, many testers and evaluators suggested that metadata application profiles will go a long way in aiding usability. There were several recommendations for the creation of guides that could help catalogers figure out where to start in the Toolkit and how to apply RDA instructions in ordinary situations.

Quite a few participants suggested developing additional documentation and training sessions (both online and in-person) to make RDA more understandable and to address particular cataloging tasks or special formats. There were also requests to include links to make other standards, such as MLA Best Practices, more accessible.

When asked which policies or MGDs should be revisited by PCC before implementation, both testers and evaluators focused on the overall navigation, searching, structure, organization, and consistency of the MGDs. Their comments included questions about why the PDF format was selected for the documentation and whether users could look forward to being able to search across all the PDFs at the same time. Also, testers specifically indicated that they would like more examples in the MGDs.

Comments about the links from the policy statements to the MGDs included repeated observations that the target MGDs were often too specific (taking users to an MGD covering an exceptional situation) or too general (taking users to an index of MGDs). Both testers and evaluators expressed a desire to have links leading users from specific RDA relationship elements to the corresponding MGDs for Relationship Labels and Descriptive Relationships.

Requests were made regarding particular PCC programs. Evaluators indicated that before implementation, they would like CONSER to provide more guidance on cataloging diachronic works; testers specifically asked how options in the Toolkit should be applied for diachronic works when they differ from CONSER practice. There were also reminders to update NACO guidance and training.

Testers and evaluators overwhelmingly indicated that they did not feel the official RDA Toolkit was ready to be used, referencing the challenging structure, navigation, and language of RDA. Testers specifically indicated that they would like more examples in the Toolkit. It has become clear that PCC will need to develop resources to address these problems; while such RDA-specific concerns can be presented to the RSC via NARDAC, there is no guarantee the RSC will make changes.

After Implementation

Most post-implementation issues identified by participants were essentially the same as for pre-implementation, which indicates difference in opinions about urgency. Multiple participants mentioned that additional clarification will be needed from PCC in regards to vocabulary encoding schemes, WEMI issues, and aggregates. They commented that MGD navigation could be improved, and those working in Sinopia would like more BIBFRAME support in policies and examples.

Both testers and evaluators hope there will be a plan for regular review and revision of the policy statements and MGDs as the community gains experience and deficiencies are noted.

Conclusion

The PCC Task Group to Test the Official RDA Toolkit was charged to conduct a thorough test of the official RDA Toolkit to ensure that PCC catalogers can accurately catalog resources in various formats in both MARC and BIBFRAME.

In designing the test, the task group specifically sought to identify problems so PCC could work towards resolving them before or after implementation of official RDA. Therefore, the test results primarily focus on the problems rather than areas where there were no concerns. Despite the frustrations encountered, many testers and evaluators indicated how much they appreciated the opportunity to participate in the test. Testers commented that the test provided a very valuable experience that allowed them to learn a lot more about the official RDA Toolkit and gain confidence in cataloging with it.

As a result of this test, the task group has concluded that PCC can successfully implement the official RDA Toolkit; however, there remain a number of issues: (1) metadata application profiles are required, (2) LC-PCC PSs and MGDs must be updated, (3) policy decisions must be made by PCC, and (4) training materials must be readily and freely available.

Appendix A: PCC Test Documentation

All documentation for the PCC test of the official RDA Toolkit is available at: https://bit.ly/PCC-RDA-Test-Documentation

Documentation for Testers

- Guidelines for Testers
- Blank Tester Template
- Sample Tester Template
- Posttest Survey for Testers

Training for Testers

- Using the RDA Toolkit
    - To download the PowerPoint slides, select File > Download > Microsoft PowerPoint (.pptx).
- Tester Orientation Session

Documentation for Evaluators

- Guidelines for Evaluators
- Blank Evaluator Template
- Sample Tester Template with Mistakes
- Sample Evaluator Template
- Posttest Survey for Evaluators

Orientation for Evaluators

- Evaluator Orientation Session

Appendix B: Presentations

- PCC Policy Committee Meeting, November 2, 2022
  - Presents an overview of the test methodology.

- NARDAC Fall Update Forum, November 14, 2022
  - Presents an overview of the test methodology and preliminary results on types of descriptions created during the testing period.

- PCC Participants' Meeting, February 23, 2023
  - Presents initial preliminary results from the posttest surveys.

- PCC Sinopia Cataloging Affinity Group, March 23, 2023
  - Presents the experiences of a tester and an evaluator working in Sinopia.

- PCC Joint Operations Committee Meeting, May 5, 2023
  - Presents preliminary results from the posttest survey open-ended questions.