

Teaching RDA in the LIS Classroom

Presented by: Elisa Sze

Education and Orientation Officer, RDA Steering Committee

24 February 2023 Webinar

Background

- Metadata Librarian, University of Toronto Libraries
- Sessional Instructor, Faculty of Information, University of Toronto
 - Previously an embedded librarian at the Faculty of Information, where I was involved in programs committee discussions
- Member-at-large, Canadian Committee on Cataloguing
- Education and Orientation Officer (EOO), co-opted position on RSC

slido



What is your primary professional role? (You may select more than one.)

ⓘ Start presenting to display the poll results on this slide.

Outline

1. Role and tasks of the Education and Orientation Officer
2. Summary of the *Report on approaches to teaching RDA in the LIS classroom*
3. Next steps
 - Handout for educators and trainers that builds upon summary findings
 - Ongoing outreach

Overview of the EOO role

- Facilitate effective RDA instruction relating to the official Toolkit
- Encourage and support communities in their transition to the official Toolkit
- Temporary 1-year position beginning January 1, 2022; term extended to December 31, 2023.

Tasks of the EOO

- Liaise with RSC members, communities as they plan outreach events
- Liaise with LIS education communities; build an informal network of RDA educators/experts
- Identify opportunities for RDA education and orientation internationally and recommend how to handle them
- Create instructional materials for RDA content and give related presentations (*but not instructional materials for specific communities*)

Report to the RSC

Presented to RSC at its October 2022 meeting

Soft published on 28 November 2022

Report on approaches to teaching RDA in the LIS classroom

Shortened link: <https://tinyurl.com/ysb4jzjw>

slido



Have you read the EOO's "Report on approaches to teaching RDA in the LIS classroom" yet?

① Start presenting to display the poll results on this slide.

Summary of the report

Highlights from each section

Methodology

- Described in “Introduction”
- Informal, in-person interviews conducted over Zoom from October 2021-mid-September 2022 (interviews after that date will be factored into the next step... which will be addressed later in this webinar)

Interviewees

- Majority were educators in library and information science (LIS) programs at universities, colleges, and vocational schools
 - LIS programs from Oceania, Europe, and North America
 - Some identified as scholars because they have not worked directly with metadata creation or cataloguing in recent years
 - Some identified as practitioners because their primary work appointment is as a practitioner; teaching contract as adjunct faculty (sessional instructor)
- A few were supervisors with training experience

Mode of outreach

How were contacts made?

- Referrals from regional RSC representatives and existing contacts
- Word-of-mouth recommendations
- Email referrals
- Cold contact through email and social media
- Interviews conducted over a Zoom call, mix of one-on-one and group calls
- When it was not possible to schedule a Zoom call, a list of questions was supplied, and the interviewee returned written responses by email

Recurring themes

- How to teach foundational concepts and terminology?
- How to adapt to new navigation of the Toolkit?
- How to provide a linear sequence or narrative to teaching RDA?

Out of scope of this report:

- LIS curriculum
- Resourcing for LIS courses

Teaching foundational concepts and terms

- Most teach a combination of theory and practice.
- Looking for experience with Official RDA Toolkit before teaching with it.
- Most are teaching RDA, but not necessarily the most current RDA.
 - Most still use the Original RDA Toolkit, though some moved to the Official RDA Toolkit .
 - Most are curious about the Official RDA Toolkit, but waiting to see what happens with implementation.
- Those who incorporate Official RDA Toolkit are also teaching theory and principles (e.g., IFLA LRM) and recognize the significance of RDA for linked data discussions.

Teaching about navigation

- Need to adapt to new ways of navigating and referencing or citing instructions
- Teaching to use the Toolkit as a tool. Know how to:
 - Search
 - Reference specific elements
 - Generate bookmarks, unique URLs for pages/specific passages within pages, and citation numbers
 - Create local documents

Guidance chapters

How to provide a more linear, narrative-based approach to teaching with the official RDA Toolkit? Guidance chapters might assist with that.

No prescribed order to how guidance chapters should be read, except to start with these:

- Introduction to RDA
 - Objectives and principles governing RDA
 - Standards related to RDA
 - Data elements

Determining an order to the Guidance chapters for novice learners

- The order proposed in the report (pages 6-7) is based on the EOO's experience as a co-instructor with May Chan, Head of Metadata Services, University of Toronto
- This order is presented as an example, and is **not** intended to be prescriptive
- Communities may differ on the order based on their own preferences and priorities

Tip: Teach how to read entity and element pages

- RDA text is technical, precise, and can be challenging for novices
- Consistent structure to entity and element pages provides a cognitive framework for learners
- Pages are structured to point out precisely when a cataloguing decision is to be made
- Element pages: Importance of “Definition and Scope”, “Element Reference” card, and “Prerecording” sections
- Demonstrate how to read Conditions and Options

Tip: Know which concepts require greater interaction and support during instruction

- Apply general understanding of entity boundaries to identify instances of work, expression, manifestation, and item
- Apply technical definitions of *Nomen*, nomen string, and appellations, and provide examples
- Explain distinction between each of the 4 recording methods, and provide examples

Tip: Demonstrate application of RDA for a defined environment

- Be mindful of students' cognitive load. Define the environment in which your students are creating their metadata description sets.
 - See Guidance chapter on [RDA implementation scenarios](#)
- For structured description, demonstrate how to apply vocabulary encoding schemes. If you require students to construct access points, show them where to go to find relevant string encoding schemes.
- The environment that you define can mimic current local metadata structures. If you typically incorporate practice into your classes, ask students to record values for that environment.

Tip: Define parameters and structure

Create a course-based [application profile](#) to guide students. This can be as simple as a template saved as a spreadsheet or document file that:

- Defines elements that students should record
- Indicates which elements can be repeated in a metadata description set
- For each element, indicates the recording method to apply
- Indicates which transcription guidelines to follow
- Specifies vocabularies, policies and/or guidance documents to apply, being sure to distinguish RDA from local rules

For a quick introduction, see [A Primer on RDA Application Profiles](#) by Melissa Parent, <https://www.rdatoolkit.org/node/256>

Tip: Plan to create (or refer to) documents to supplement RDA Toolkit

- Digital documents can include embedded links to pages of RDA Toolkit, or specific passages within a page
- Physical (paper) documents can include citation numbers, in lieu of embedded links
- Documents can be hosted on the RDA Toolkit “Documents” space, with access set either to “local” or “global”. Show students how to subscribe to document.

Supports for educators

- Need for regional networks where educators can readily consult with local practitioners and experts
- More opportunities for training and practice, preferably geared towards educators and trainers
- Sharing of sample application profiles, guidance documents, or templates amongst instructors, for reuse in LIS classrooms
- Textbooks or workbooks with built-in exercises
- Handbooks that break down instructions in a practical way for educators who are not currently practitioners

Next steps...

Current status

- Although the EOO reached out to regions represented by NARDAC, EURIG, and ORDAC, many of the educators represented in the first round of interviews were from North America
- Internationalize the topic of training
 - Incorporate more perspectives from other regions

Here are initial steps that we will be taking...

1. Develop a handout for educators and trainers

- Goals:
 - Make available through the RSC website
 - Be international in scope
 - Have the potential to be translated into other languages
 - Be generalized to the international community, leaving room for local policies to be determined by individual communities
- **What would help you as an educator or trainer?**

slido



If a handout were created for educators or trainers, what information would you find helpful? (Answers will be reviewed by the EOO and shared with the RSC.)

① Start presenting to display the poll results on this slide.

2. Ongoing outreach to educators and trainers

- Establish new connections, especially in regions that were less represented in the first round of interviews
- Where there are few to no formally established LIS education programs affiliated with universities/colleges, identify trainers
- Re-connect with educators from the first round of interviews to hear about their ongoing experience with RDA

Contact

Are you looking for tips or ideas on teaching with RDA?

Do you have suggestions for the RDA handout for educators and trainers?

Please email: elisa@rdatoolkit.org

Thank you for your attention!