The New RDA Toolkit: How Did We Get Here, and What Do We Do Next?

Kathy Glennan
Chair, RDA Steering Committee
Head, Cataloging & Metadata Services
University of Maryland Libraries
AACR2 – A Cataloging Manual

• Designed for a predictable and controlled publishing environment
  ▪ Libraries primarily collected print resources, produced in multiple copies
  ▪ Separate chapters for description by format
    ○ Distinction met specific needs, especially for non-print, but also introduced variations in practice (source of title, imprint, etc.)
  ▪ Included concepts of universal bibliographic control

• Interpretation/guidance for catalogers
  ▪ LC Rule Interpretations, Music Cataloging Decisions
AACR2 – Original Edition

- Published 1978
- Implemented by most in US in 1981
- Designed for card catalogs
  - With MARC cataloging waiting in the wings
- Controversial
  - Integrated ISBD for all formats
  - Substantial change in form of name for corporate bodies
- Overthrow of the old bibliographic order?
AACR2 – Later Editions

• Content added/changed to reflect the changing nature of publications
  ▪ Machine-readable data files --> Electronic resources
  ▪ Serials --> Continuing resources

• A print product
    ▪ First issued exclusively as loose-leaf in 2002
    ▪ Integrated into Cataloger’s Desktop in 2004

• Need for major revision recognized in 1997:
  ▪ International Conference on the Principles and Future Development of AACR
RDA (Original)

• Designed to accommodate both “traditional” publications and resources coming out of the Internet age
  ▪ Tangible and intangible carriers, self-published resources, etc.
  ▪ Blending of formats
    ○ Serially issued map on CD-ROM

• More reliance on “cataloger’s judgment”

• Interpretation/guidance for catalogers
  ▪ LC-PCC Policy Statements, MLA Best Practices
RDA (Original)

- Published 2010, implemented by many in 2013
- Built on IFLA Functional Requirements Models to date
  - Organized by FR entities – in a linear fashion
- Eliminated descriptive differences based on format
  - Source of title instructions consistently applied
- Designed as a web resource, but with print available
  - Major updates annually
RDA (Original)

- Primarily implemented in MARC 21
  - For use in web-based catalogs
- Controversial
  - Not tied to ISBD
  - Unnecessarily abandoned established cataloging practices, or
  - Too rooted in the past?

<table>
<thead>
<tr>
<th>title</th>
<th>Dizzy fingers.</th>
</tr>
</thead>
<tbody>
<tr>
<td>published</td>
<td>San Francisco, Califonia : Pair O Dactyl Records, [between 1990 and 1994?]</td>
</tr>
<tr>
<td>description</td>
<td>1 audio disc ; 4 3/4 in.</td>
</tr>
<tr>
<td>sound</td>
<td>digital, optical</td>
</tr>
<tr>
<td>file</td>
<td>audio file, CD audio</td>
</tr>
<tr>
<td>information</td>
<td></td>
</tr>
<tr>
<td>all locations</td>
<td>Availability</td>
</tr>
<tr>
<td>location</td>
<td>UMCP Performing Arts Library © Paged Collections Room: ask at the circulation desk</td>
</tr>
<tr>
<td>issue no.</td>
<td>Pair O Dactyl Records: PDR0176CD</td>
</tr>
<tr>
<td>notes</td>
<td>Title from disc label.</td>
</tr>
<tr>
<td></td>
<td>Principally popular music arranged for piano duo and orchestra; the Confrey works arranged for piano duo and percussion.</td>
</tr>
<tr>
<td></td>
<td>Arranged by Norman Landsberg and Robert Blue Yount.</td>
</tr>
<tr>
<td>notes</td>
<td>Landsberg &amp; Yount, piano duo ; featuring Gaylord Birch, drums, Jeff Neighbor, bass, with San Francisco Festival Pops Orchestra (1st-2nd, 4th-6th, 8th-9th, 11th works).</td>
</tr>
</tbody>
</table>

... Full record (from 2012) at https://catalog.umd.edu/docno=004165193
The 3R Project

- **RDA Restructure and Redesign Project**
  - Launched in 2016
    - Underlying model had changed from Functional Requirements Models to IFLA Library Reference Model (LRM)
  - Original Toolkit content “frozen” in 2017
  - Opportunity to make substantive improvements/changes
3R Project Goals

• Implement LRM, including new entities
• Generalize the instructions
  ▪ Retain original RDA elements unless they conflict with LRM, even if redundant
• Offer more flexibility in choosing how to record a piece of information
• Develop a new approach to relationship designators
• Better position RDA for use in linked data applications
3R Project Goals

• Promote even greater international adoption of RDA
  ▪ Original Toolkit available in 8 languages
  ▪ RDA vocabularies (in whole or in part) available in over 20 languages now

• Improve the Toolkit interface and address long-standing problems
  ▪ Meet WCAG 2.0 accessibility standards

• Restructure the underlying data
  ▪ Provide efficient and reliable work processes and tools for RDA editors and translators
RDA (Official - or Post 3R)

- Published at the end of 2020; implementation timeline determined by the various cataloging communities
- Designed for an unpredictable and evolving publishing environment and changing user expectations
  - Connecting users to resources anytime, anywhere
- Positioned to expand for use in archives and museums
- Able to be used in any RDF linked data application
  - Can accommodate ingest of large metadata description sets from external sources and still parse them as RDA compatible
- Uses an “open world” assumption
  - Metadata statements can be used/reused anywhere
RDA (Official - or Post 3R)

• Controversial
  ▪ Huge expansion of elements
    o No preference/hierarchy/order imposed
  ▪ Generalized instructions support international adoption
    o But communities need to develop more supporting documentation to meet their specific needs
    o Migration of Anglo-American specific instructions to the Community Resources tab
  ▪ Element names, definitions, and even instructions are not written in cataloging manual style prose
  ▪ Can we still share our RDA-based data across communities?
• Operating in a new (and still changing) world
  ▪ Crafting original cataloging records using RDA won’t be the only way bibliographic data is created and shared
  ▪ Substantive changes possible with each release, normally quarterly
  ▪ Taking advantage of a linked data environment requires breaking out of our library-siloed mindsets, including
    o Reliance on strings vs. things
    o Holding on to the concept of “records”
    o Deleting vs. deprecating information
• Get to know **Entities**
  - From LRM
  - Did not implement “Res”
    - “RDA entity” is the top term instead
  - Kept refinements of the new “Collective Agent”: “Corporate Body” and “Family”
• Ability to search or browse by attribute or relationship elements at end of entity pages
Approaching Official RDA

• Get to know *Elements*
  ▪ Navigate from Entities, or search directly
  ▪ Distinction between attribute and relationship elements
  ▪ Element Reference
    ▪ Anything with a “range” is a relationship element, otherwise it’s an attribute
    ▪ Includes mappings to other standards
      ▪ LRM, Dublin Core, MARC 21
    ▪ Includes alternate labels
  ▪ Consistent page layout
Approaching Official RDA

Guidance Chapters
• Introduction
• Aggregates
• Application profiles
• Content and carrier
• Data provenance
• Diachronic works
• Entity boundaries
• Fictitious and non-human appellations
• Manifestation statements
• Nomens and appellations
• RDA implementation scenarios
• Recording methods
• Representative expressions
• Resource description
• Terminology
• Transcription guidelines
• User tasks
• Well-formed RDA

• Get to know Guidance
  ▪ Chapters explain many concepts
    o Many of the concepts aren’t as new as they may seem
    o Some have sub-sections
  ▪ Frequently referred to from specific instructions:
    For general guidance on identifiers, see Guidance: Recording methods. Recording an identifier →.
Approaching Official RDA

• Get to know Policies
  ▪ Right now, where to find DRAFT collected policy statements from the British Library and from LC-PCC
  ▪ MLA Best Practices will go here too
  ▪ Separate sections for
    ○ RDA Entities and Elements
    ○ RDA Guidance
  ▪ Need some context
    ○ Links in display give option box OR navigation assistance to the element page
Approaching Official RDA

• Get to know **Resources**
  - Want to find RDA vocabularies?
    o See Vocabulary Encoding Schemes
  - Want to know the latest changes?
    o See Revision History
  - Want to consult AACR2?
    o It’s here, basically as a searchable PDF
      ▪ Less functionality than in Original Toolkit
    o You may need to log in with your institutional account
Wait, Community Resources?

- New with the September 2020 release
  - Under active development by the RSC
  - Structure and content may change as development continues

- Relocated community-specific instructions from “base RDA”
  - Still available for use in the Toolkit
  - Includes reworking of Appendices for Capitalization, Abbreviations, Initial Articles, and Titles of Nobility
  - Control of content and development up to user communities – like MLA
RSC Development Priorities

• More details in **RSC Action Plan, 2021-2023**
  - Work on governance issues relating to Community Resources
  - Resolve pseudo-element issues
  - Work on the following, by forming separate working groups
    - Extent, Place/jurisdiction, Religious content, Names of corporate bodies in more than one language
  - BIBFRAME mapping
  - Act on proposals arising from communities
More Information

• RDA Steering Committee website: [http://www.rda-rsc.org/](http://www.rda-rsc.org/)
  ▪ Including pages for Presentations (by year) and Documents (by year)

• Official RDA: [https://access.rdatoolkit.org/](https://access.rdatoolkit.org/)

• RDA Toolkit website: [https://www.rdatoolkit.org](https://www.rdatoolkit.org)

• RDA YouTube channel: [https://www.youtube.com/c/RDAToolkitVideo](https://www.youtube.com/c/RDAToolkitVideo)
  ▪ January 2021 RDA Toolkit Demo
  ▪ RDA Concept series short videos
Questions?
Contact me:
RSCChair@rdatoolkit.org