Test of the Official RDA Toolkit

Adam Baron
On behalf of the PCC Task Group to Test the Official RDA Toolkit
PCC Task Group to Test the Official RDA Toolkit

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- Oksana Osborne (GPO)
- Gordana Ruth (NLM)
- Trina Soderquist (LC)
Purpose

• To conduct a thorough test of the Official RDA Toolkit to ensure that PCC catalogers can use the toolkit, related LC/PCC Policy Statements, and Metadata Guidance Documents to accurately catalog materials in various formats in both MARC and BIBFRAME

• To ensure that LC-PCC Policy Statements and Metadata Guidance Documents work well in the new toolkit before PCC implementation

• To identify possible revisions to policies and guidance, as well as possible training needs
The Test

October 17-November 4
Test Overview

• Create 6-8 bibliographic records and at least 1 authority record (if NACO trained) using the Official RDA Toolkit, the LC-PCC Policy Statements, and the Metadata Guidance Documentation

• Document the steps taken to describe items, as well as the difficulties encountered, in order to identify where policies and guidance may need revision
Documentation for Testers

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

• Provides detailed instructions for completing the test and filling out the template

• Basic Procedure
  ▪ Catalog items
  ▪ Document instructions, policies, and guidance applied
  ▪ Note any questions or problems
  ▪ Upload final records and surrogates
  ▪ Submit posttest survey
## Blank Tester Template

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Posttest Survey for Testers

Sample Questions

- In cataloging your items, did you have any difficulty interpreting Official RDA?
- In cataloging your items, did you notice any areas that will require extra attention during training?
- As a result of your test, do you feel that the Official RDA Toolkit is ready to be used now?
- Do you have any suggestions to help with the implementation process?
- Before implementation, are there any policies or metadata guidance that should be revisited by PCC?
- After implementation, are there any policies or metadata guidance that should be revisited by PCC?
Recruiting Testers

- Two calls for participation:
  - December 2021: Initial call to PCC List by PoCo Chair
  - September 2022: Second call to PCC List by task group

- Tester Participation Survey
  - Detailed information about the test, including all documentation
  - Interest in participating
  - Formats and level of expertise
  - Languages and scripts
  - BIBFRAME

Tester Participation Survey

Thank you for your interest in being a tester for the PCC test of the Official RDA Toolkit.

OVERVIEW OF THE TEST
For the test, the goal is to create 6-8 bibliographic records and at least 1 authority record (if NACO trained) using the Official RDA Toolkit, the LC-PCC Policy Statements, and the Metadata Guidance Documentation. You will document the steps you take to describe items, as well as the difficulties you encounter, in order to identify where policies and guidance may need revision.

FORMATS
You will be assigned one or more formats to catalog based on your expertise.

EXPERIENCE AND TRAINING
Testers require a good working knowledge of original RDA, but should have little experience with Official RDA.

If selected for the test, you will receive the following training via Zoom:
- Monday, October 3 at 2:00-3:00 PM EDT / 11:00 AM-12:00 PM PDT: Training on navigating and using the Official RDA Toolkit
- Tuesday, October 11 at 2:00-3:00 PM EDT / 11:00 AM-12:00 PM PDT: This session will cover how the test will be conducted and answer any questions you have
Selecting Testers

• Matched testers with evaluators based on format and language/script expertise

• 50 testers were selected to participate from:
  - 36 different institutions, including academic, public, national, and government libraries
  - United States, Canada, Europe
# Formats, Languages and Scripts

**Selected**

### Text
- Book (Electronic)
- Book (Print)
- Graphic novel
- Legal material
- Rare material

### Audio/Music
- Music audio disc
- Score
- Spoken word audio disc
- Streaming audio

### Cartographic
- Atlas
- Map

### Video
- Streaming video
- Video game
- Videodisc

### Continuing Resource
- Integrating resource
- Serial

### Other
- Kit
- Photograph
- Realia

### Languages and Scripts
- Chinese
- Cyrillic
- English (or any Latin script)
- Hebrew
- Japanese
Training for Testers

Official RDA Toolkit Training
• Monday, October 3

• Topics covered:
  ▪ Logging into the toolkit and creating a profile
  ▪ Navigating RDA Toolkit
  ▪ Searching RDA Toolkit
  ▪ Personalizing RDA Toolkit, including managing views

Training for Testers
• Tuesday, October 11

• Topics covered:
  ▪ Purpose and overview of the test
  ▪ Introduction to Tester Template and folder
  ▪ Demonstration on how to fill out the template
  ▪ Q & A
Assignment Emails and Testing Period

• All testers received an assignment email with:
  ▪ Their assigned format(s)
  ▪ Their assigned editor(s) (i.e., MARC-based system or Sinopia)
  ▪ Link to their assigned Tester Template
  ▪ Link to their assigned Google Drive folder
  ▪ Link to the Posttest Survey for Testers
  ▪ Links to documentation and training

• Testing period: October 17-November 4, 2022
Preliminary Results

• 45 testers completed the test

• 285 records were created
  ▪ 239 bibliographic records
    ▪ 23 BIBFRAME records in Sinopia
      • 6 electronic books
      • 7 print books
      • 4 videodiscs
      • 6 serials
  ▪ 46 authority records

Languages and Scripts

- Dutch
- English
- French
- German
- Italian
- Spanish
- Chinese
- Hebrew
- Japanese
- Serbian
- Russian
- Ukrainian
Preliminary Results

Bibliographic Records Created

- Text: 118 (50%)
- Audio and Music: 45 (19%)
- Cartographic: 29 (12%)
- Video: 8 (3%)
- Continuing Resource: 24 (10%)
- Other: 15 (6%)

Authority Records Created

- Corporate Body: 20 (44%)
- Expression: 16 (35%)
- Person: 6 (13%)
- Place: 1 (2%)
- Series/Subseries: 1 (2%)
- Work: 2 (4%)

RDA
Resource Description & Access
The Evaluation

November 14-January 6
Evaluation Overview

• Review bibliographic and authority records that testers created using the Official RDA Toolkit, the LC-PCC Policy Statements, and the Metadata Guidance Documentation

• Analyze tester templates and compile comments and observations in order to identify where policies and guidance may need revision
Documentation for Evaluators

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

• Provides detailed instructions for completing the evaluation and filling out the template

• Basic Procedure
  ▪ Review assigned Tester Templates
  ▪ Document all issues encountered, either by tester or evaluator
  ▪ Submit posttest survey
Blank Evaluator Template

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<th>MARC or BIBFRAME</th>
<th>RDA Element Recorded</th>
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Sample Evaluator Template

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<td>Problem in LC-PCC PS</td>
<td>The LC-PCC PS only refers to manuscripts and does not provide instructions on if it should or should not be applied to other resources. LC/PCC practice: For manuscripts, title of manifestation should come from the name of a physical manuscript.</td>
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<td><a href="https://access.io">https://access.io</a></td>
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<td>Incorrect instruction applied</td>
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Posttest Survey for Evaluators

Sample Questions

- In examining the records, did you notice any areas where it seemed the tester(s) had difficulty interpreting Official RDA?
- In examining the records, did you notice any areas that will require extra attention during training?
- As a result of your evaluation, do you feel that the Official RDA Toolkit is ready to be used now?
- Do you have any suggestions to help with the implementation process?
- Before implementation, are there any policies or metadata guidance that should be revisited by PCC?
- After implementation, are there any policies or metadata guidance that should be revisited by PCC?
Recruiting Evaluators

• Recruitment
  ▪ Initially, focused on those who wrote policy statements or Metadata Guidance Documents
  ▪ Expanded to those with a good working knowledge of Official RDA

• Evaluator Participation Survey
  ▪ Detailed information about the test, including all documentation
  ▪ Interest in participating
  ▪ Formats and level of expertise
  ▪ Languages and scripts
  ▪ BIBFRAME
Orientation for Evaluators

• Monday, November 7

• Topics covered:
  ▪ Purpose and overview of the test
  ▪ Introduction to Evaluator Template and files
  ▪ Demonstration on how to fill in the template
  ▪ Q & A
Assignment Emails and Evaluation Period

• All evaluators received an assignment email with:
  ▪ Links to each of their assigned tester’s Google Drive folder
  ▪ Link to their assigned Evaluator Template
  ▪ Link to their assigned Google Drive folder
  ▪ Link to the Posttest Survey for Evaluators
  ▪ Links to documentation and training
  ▪ Link to Evaluator Roster

• Evaluation period: November 14, 2022-January 6, 2023
The Analysis

January-March 2023
Analysis Overview

• To aggregate results from the evaluation to identify where LC-PCC Policy Statements and Metadata Guidance Documentation may need revision

• To analyze the results of the posttest surveys from testers and evaluators to provide recommendations for PCC implementation and training

• To prepare a final report of results and recommendations

• Analysis period: January-March 2023
Questions

pccrdatest@lists.berkeley.edu