

Planning to Teach RDA

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R | D | A
Resource Description & Access

Context

- To support educators by providing high-level tips for teaching plans.
- Assumption: the educator has some familiarity with RDA, even if they have not used the official Toolkit yet.
- Some theories of teaching will be presented; the purpose is not to debate the merits of those theories but to offer ideas for course design.
- Local educators know their audiences best and should customize teaching plans accordingly.
- Some of these tips will be applicable to workplace training as well.

Reviewing what we know: Continuity of RDA

- “RDA in the original RDA Toolkit and in the new RDA Toolkit is fundamentally the same.”*
- Work, Expression, Manifestation, and Item are still the entities we think about when describing resources. The properties of these entities are still called elements.
- Many of the RDA terms from the original Toolkit have been retained when they do not conflict with [IFLA LRM](#).
- If you were already cataloguing in RDA, your data will not look much different in that same environment.

* Chris Oliver. *Introducing RDA: A Guide to the Basics After 3R* (Chicago: ALA Editions, 2021), vii.

Reviewing what we know: RDA after 3R

- The structure of the Toolkit has changed
 - We will need to adapt how we look up and cite instructions.
- Community-specific instructions have moved out of the base text of RDA
 - Refer to policy statements, Community Resources, and community-driven guidance documents.
- New terms allow us to address common complex scenarios (aggregates, diachronic works) or facilitate RDA data use for a linked data environment.

Theories, principles, and models seen in LIS instructional design

- Pedagogy (“the art, science, or profession of teaching”) and andragogy (“the art or science of teaching adults”)*
- ADDIE model (5 phases: Analysis, Design, Development, Implementation, Evaluation)
- Experiential learning

*Definitions from the [Merriam-Webster Dictionary online](#)

Assumptions	Pedagogical approach	Andragogical approach
The learner	Learning relies on the instructor. Instructors evaluate learning.	Learners are self-directed. Assessment is done by self-evaluation.
Experience	Students have no experience.	Learners have some experience.
Readiness	Students are told what to master in order to make progress.	Any change will spark learners' willingness to learn.
Orientation	Each subject has its own natural sequence of contents to follow.	Learning is organized around real tasks and problems.
Motivation	Students are motivated by external pressures.	Learners seek self-esteem, confidence, and self-actualization.

Adapted from: Clayton Smith and Carson Babich. Chapter 7.4 in Theories of individual and collective learning. <https://ecampusontario.pressbooks.pub/ticl/> CC BY-SA 4.0

ADDIE model applied to library education

Adapted from Stern & Kaur's work on information literacy training (2010):

- What does the learner already know and need to know?
- What methods and materials will most efficiently reach the learner?
- What questions or concerns are most important to the learner?
- What are the barriers to learning and how can those be overcome?
- What are the practical relevant problems that this training will solve?
- How can learners be encouraged to share information and contribute to a community for continual learning?

Caroline Stern & Trishanjit Kaur (2010). Developing theory-based, practical information literacy training for adults. *The International Information & Library Review*, 42(2), 72. [DOI: 10.1080/10572317.2010.10762847](https://doi.org/10.1080/10572317.2010.10762847)

Experiential learning in library education

- Experience stimulates students' engagement.
- Instructors are facilitators. Find the right type of experience centered around a real-life problem, maintain a supportive attitude, and develop an environment that encourages students to explore and reflect on their learning (reflexive practice).
- Experience raises students' awareness, advances their growth, and prepares them for future community participation.

John M. Budd, Clara M. Chu, Keren Dali, and Heather O'Brien. 24 February 2016. Making an impact through experiential learning. In Proceedings of the Association for Information Science and Technology (ASIST), 52(1-4). <https://doi.org/10.1002/pr2.2015.14505201007>

Approaches to teaching RDA, categorized by course/training program

Courses that emphasize theory	Courses on metadata schemas and systems
Courses that offer hands-on practice in resource description	On-the-job training for cataloguers

Courses that emphasize theory

- Entity-relationship models: introduce LRM as an example model available in multiple languages.
- Cite RDA as a real-world implementation of LRM.
- LRM entities are described by attributes and relationships. RDA entities are described by attribute elements and relationship elements.
- LRM attributes and relationships are expressed as a literal or a URI. RDA elements are recorded as a literal (unstructured description, structured description, or identifier) or IRI (an extension of URI)

Courses on metadata schemas, systems

- Introduce LRM as an example of an entity-relationship model.
- Discuss classes and properties, then show students how RDA Registry presents entities as classes and elements as properties
- Encourage exploration of the RDA Registry, for elements, terminologies, definitions, scope notes, translations, and alignments with RDF, Dublin Core, LRM, ISBD, MARC 21 formats, and RDA/ONIX Framework

Courses that offer hands-on practice

- Experiential learning: Engage students with a real-life standard. Simulate cataloguers' thought processes.
- Introduce LRM to help students understand the information architecture of the Toolkit and hone their ability to find instructions.
- Scaffolded learning: Define the data environment. Break down instructions into sequences of smaller steps and decisions.
- Instructor's role is not about creating experts, but helping students cultivate "cataloger's judgment".
- Accessing the Toolkit: 30-day free trial or reduced classroom subscription fee for LIS education programs.

On-the-job training for cataloguers

- Employees often come with a mix of experiences.
- Employees may not have time for self-directed learning. Managers can help by approving work time for learning.
- Accommodate different levels of knowledge
 - Is a “train the trainer” model feasible? Identify those who would be good local trainers.
 - Consider separate training for each group to address different levels of complexities. For example, offer separate sessions for original cataloguers, copy cataloguers, and format specialists.
 - Celebrate examples of peer support.

Examples of concepts to explain

Elements

- What are elements? Minimum description?
- How to decipher the hierarchy of element supertypes and element subtypes?
 - Instructions pertaining to an element supertype apply “down” to its element subtypes
 - Choice between “broader” and “narrower” elements
- Element Reference Card
- [RIMMF](#) (RDA in Many Metadata Formats) can be used as a tool for visualizing RDA data and relationships between entities.

Application profile: examples

- ALA eCourse “A Practical Approach to New RDA” [template](#), Elisa Sze & May Chan (August 2022)
- [Draft Music Library Association application profile](#) (continuously updated)
- Ontario Library Association Superconference pre-conference workshop [template](#), Thomas Brenndorfer, Laura Doublet, Juliya Borie & Elisa Sze (February 2023)
- [RDA Toolkit Webinar example](#), Melissa Parent (October 2021)

How to navigate the Toolkit?

- Help pages
- Guidance chapters
 - Default arrangement (mainly alphabetical) or Orientation view (arranged thematically)
- Entity pages
 - Minimum description requirements
 - Elements describing the domain entity
- Search by element reference labels or alternate labels, filter results
- Base text vs. community resources

Sample content from INF2145 *Creation and Organization of Bibliographic Records*

An in-person elective course in the Master of Information (MI) program at the University of Toronto [Faculty of Information](#) (iSchool)

Instructors: Elisa Sze & Juliya Borie

Winter 2023 term

[Course syllabus](#)

Sample: Situating RDA in a broader context

“Layer cake” metaphor to explain that RDA is one of many standards covered in the course.

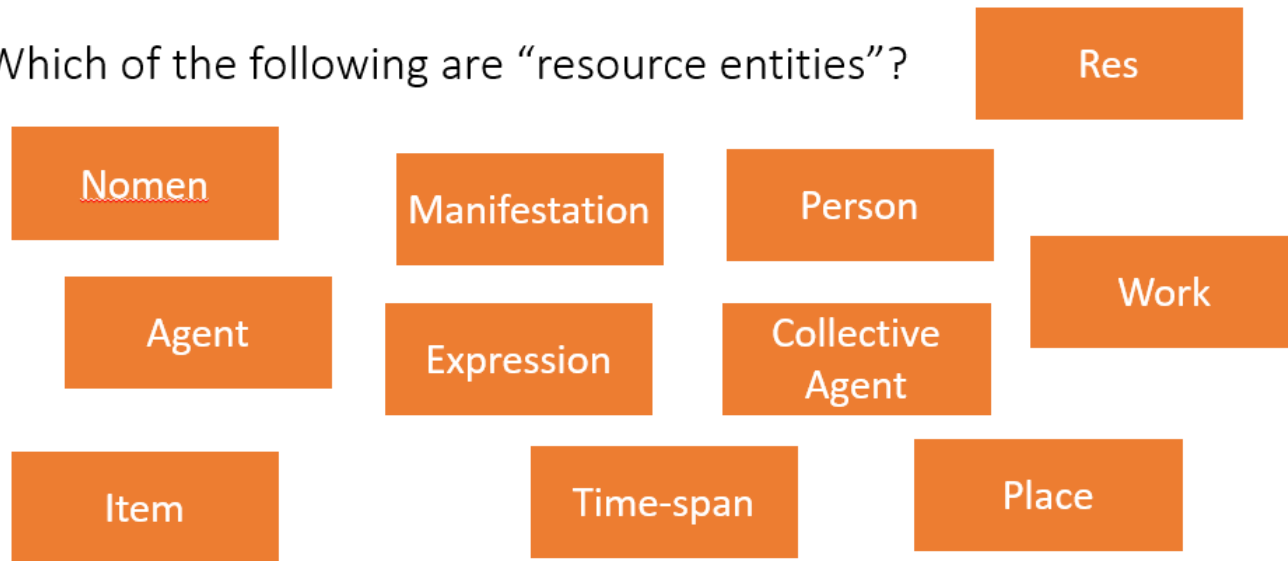


Sample: Formative assessment

Low pressure, ungraded in-class interaction to test students' grasp of LRM entities

Formative Assessment

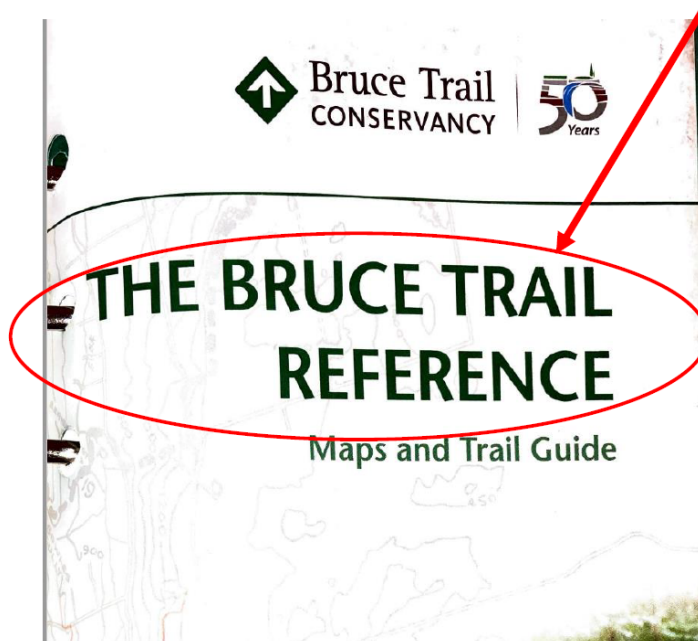
Which of the following are “resource entities”?



Sample: Formative assessment

Low
pressure,
ungraded
in-class
interaction

If we transcribed the circled text exactly as we see on a resource, which **recording method** are we applying?

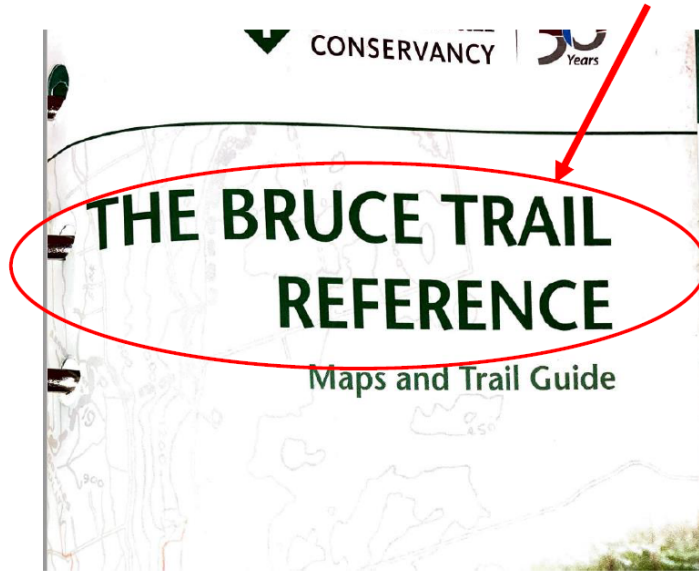


- a) Unstructured description
- b) Structured description
- c) IRI
- d) Identifier

Sample: Formative assessment

Low
pressure,
ungraded
in-class
interaction

If we transcribed the circled text as
The Bruce Trail reference
which transcription method are we following?



- a) Basic transcription
- b) Normalized transcription
- c) IRI

Sample: Formative assessment

Ungraded in-class activity requiring students to interact with the RDA Toolkit, talk to each other, and move around in the physical classroom.

INF2145, Winter 2023
Week 3 (January 23, 2023)

In-Class Activity: Reviewing How to Read an Element Page

Instructions

You have been given a print-out of either an RDA entity label or an RDA element reference label.

Your task:

- If you have an RDA entity label, stand at the front or sides of the classroom, and hold up your sign so that your entity label is visible.
- If you have an RDA element label, look up the domain entity for your element, then join your domain.

Sample: Formative assessment

Low
pressure,
ungraded
in-class
interaction

Determining the preferred title of work

What is the preferred title of work?

- White teeth
- White teeth : a novel
- White teeth : a novel /
Zadie Smith

White Teeth

A NOVEL

Zadie Smith

VINTAGE INTERNATIONAL
VINTAGE BOOKS
A DIVISION OF RANDOM HOUSE,
INC.
NEW YORK

FIRST VINTAGE
INTERNATIONAL EDITION,
JUNE 2001

Copyright © 2000 by Zadie Smith

Vintage ISBN 0-375-70386-1

Sample: Formative assessment

Ungraded in-class exercise that prepares students for what to expect in a graded assignment.

Solutions were posted to the course learning management system later in the week, prior to the next class.

Metadata Description Set - BLANK WORKFORM

Using the accompanying Application Profile, create a metadata description set that provides an effective description for your resource. Use this [workform](#) to record the appropriate domain and their elements, followed by the values of those respective elements.

Limit each row to one element only. Elements may be repeated in additional [rows](#), if repetition of the element is permitted by the Application Profile. Values of elements should be recorded in accordance with the Application Profile, RDA Toolkit instructions, and any appropriate LC-PCC Policy Statements.

Add rows to the [workform](#) as needed.

Before finalizing your metadata description set, sort your elements by their domain entity, so that Work elements are grouped together, Expression elements are grouped together, and Manifestation elements are grouped together.

A few key elements are listed below to get you started, but you will need to identify additional elements to include for an effective description.

Domain	RDA Element	Value
Work	extension plan	static plan
Work	authorized access point for work	
Work	preferred title of work	
Expression	content type	
Expression	language of expression	
Manifestation	title proper	
Manifestation	statement of responsibility relating to title proper	
Manifestation	media type	
Manifestation	carrier type	
Manifestation	mode of issuance	single unit
Manifestation	work manifested	

Sample: Online discussion board post

Weekly prompts to encourage students to reflect on the course content. Interactions on the discussion board were factored into the participation grade (weighted at 10%) at the end of term.



[Redacted Name]
Feb 5, 2023

I think this week I got a better sense of how different bibliographic utilities are used together when creating records. For example, in the class demonstrations we would move back and forth between two or more of the application profile, the string encoding scheme, the RDA toolkit, and the LC Authorities Database in a way that seemed like we were always directed where to go rather than having to keep multiple standards in mind at once from the start. When we started going through the RDA toolkit documents it was making sense to me, but I also had the feeling that I wouldn't know where to start if I were to actually think about creating a record! I am glad that the application profile for Assignment 1 gives us such a clear starting point for our description.

← Reply



Elisa Sze
Feb 5, 2023

Hi [Redacted Name] thanks for your post, and for sharing how the application profile for Assignment 1 is helping you. With practice, the act of creating a bibliographic description will become easier, but just know that even for seasoned cataloguers, having an application profile of sorts is considered very useful! (Sometimes, cataloguing agencies won't develop actual application profiles, but will still develop documentation intended to guide cataloguers through the elements they should capture in a description, such as checklist of fields to include, and workflow documents.)

My hope is that in tomorrow's class, we will have time to look at a couple more examples of bibliographic records, and to highlight a few more elements. Please don't hesitate to ask in class if there's anything you'd like Juliya and I to demonstrate.

← Reply



Sample: Online discussion board post

The discussion board allowed instructors to reinforce key points, such as how access points work in public catalogue searches and displays.

References	20	0 Morton, David (David R.)	personal name
Authorized Heading	21	0 Morton, David (Dramatist)	personal name
Authorized Heading	22	4 Morton, David (Emeritus professor of biology)	personal name
Authorized Heading	23	1 Morton, David Emery	personal name
References	24	0 Morton, David, fl. 1663	personal name
Authorized Heading	25	3 Morton, David J., 1969-	personal name
Authorized Heading	26	0 Morton, David James	personal name
References	27	1 Morton, David L.	personal name


Now, if you run a University of Toronto library catalogue search for anything written by the author "Morton, David (Dramatist)", you should get a search result like this:

Search Criteria ▾ Simple Search

→ Author/Creator is (exact) Morton, David, (Dramatist) AND Any field contains Search

Please sign in to get complete results and see request options [Sign In](#) [Need help?](#) [DISMISS](#)

0 selected 1 Results 📌 ...

 **BOOK**
The wider earth
Morton, David, (Dramatist), author
London : Nick Hern Books
2018
[Available At Robarts Library Stacks \(PR9619.4 .M735 W53 2018\) And Other Locations >](#)

Sample: Summative assessment

Excerpt
from the
first major
graded
assignment

INF2145 Creation and Organization of Bibliographic Records
Assignment 1. Description and Access

Winter 2023
INSTRUCTIONS PACKAGE

Due Date: Before Week 6 class (Feb. 13, 2022, 6:30 pm ET) via Quercus
Course Weight: 25%

General Instructions

Assignment 1 requires you to:

1. Methodically describe a single resource, following the official RDA as your content standard.
2. Submit a reflection piece, in which you discuss the effectiveness of your resource description in addressing the concepts, principles, and theories discussed to date within this course.

Instructions for Part 1: Metadata Description Set

You have been assigned:

- A single resource to describe, called [*Indigenous Languages in Canada*](#)
- An Application Profile, which defines potential RDA elements to record, as well as additional considerations to factor into a metadata description set. (Review both worksheets found within the same Excel workbook.)
- A Metadata Description Set workform

Sample: Summative assessment

Excerpt of the
take-home exam,
which was assigned at
the end of the course

INF2145, Winter 2023

Take-home Exam

Instructions Package

Due Date: Tuesday, April 11, 2023 by 11:59 pm EDT via Quercus.

Course Weight: 25%

INSTRUCTIONS

This is an open book exam. While we recommend that you allocate 2.5 hours to complete the exam, you may take as much time as you need provided your submission is turned in via Quercus by the due date.

The purpose of this take-home home exam is for you to demonstrate your understanding of cataloguing principles, and your ability to apply multiple concurrent standards to enable the user tasks set out in the IFLA LRM. You will *independently* complete and submit two parts to this exam:

1. An RDA-based metadata description set encoded in MARC21 bibliographic format. Your MARC bibliographic data will adhere to the accompanying application profile, include MARC relator terms, LCSH headings, and an LC classification-based call number.
2. A short personal reflection piece (500-750 words)

More details outlining the deliverables of each part follows.

PART 1: RDA DATA ENCODED IN MARC

Using the MARC template provided, create a MARC-encoded, RDA-compliant metadata description set describing the assigned manifestation. Treat the PDF as a **surrogate of the print resource**. Your metadata description set should:

- Comply with RDA requirements for a well formed, coherent “effective description”

Sample: Summative assessment

Excerpt of the application profile that formed part of the exam package

RDA Element	Repeatable Element	Domain	Range	Recording method	If Structured Description: Vocabulary Encoding Scheme or String Encoding Scheme	If Unstructured Description: Transcription Method	Additional Comments	Potential MARC21 Bibliographic Tag(s) and Subfields (Fixed fields have not been mapped below)
language of expression	yes	Expression		structured	encoding scheme handout MARC Code List for Languages	not applicable	appropriate	008/35-37, 041 \$a, 546 \$a. If assigning a uniform title in MARC record, could also be 130 \$I or 240 \$I as appropriate.
content type	yes	Expression		structured	RDA VES: Content Type	not applicable		336 \$a
mode of issuance	no	Manifestation		structured	RDA VES: Mode of Issuance	not applicable		334 \$a
identifier for manifestation	yes	Manifestation	Nomen	identifier	not applicable	not applicable	For URLs of online resource, see the element "Uniform Resource Locator".	020 \$a,\$q,\$z
title proper	no	Manifestation	Nomen	unstructured	not applicable	normalized		245 ** \$a
parallel title proper	no	Manifestation	Nomen	unstructured	not applicable	normalized	Record only if value is located on the same source as the title proper. Otherwise, record as a variant title of manifestation.	245 ** \$b
other title information	no	Manifestation		unstructured	not applicable	normalized		245 ** \$b
statement of responsibility relating to title proper	no	Manifestation		unstructured	not applicable	normalized		245 ** \$c. If warranted, 500 \$a.
variant title of manifestation	yes	Manifestation	Nomen	unstructured	not applicable	normalized		246 ** \$a. If warranted, 500 \$a.
edition statement	yes	Manifestation		unstructured	not applicable	normalized		250 \$a
place of publication	yes	Manifestation	Place	unstructured	not applicable	normalized		264 #1 \$a
name of publisher	yes	Manifestation	Nomen	unstructured	not applicable	normalized		264 #1 \$b
date of publication	yes	Manifestation	Timespan	unstructured	not applicable	normalized		264 #1 \$c
copyright date	yes	Manifestation	Timespan	unstructured	not applicable	normalized		264 #4 \$c
media type	yes	Manifestation		structured	RDA VES: Media Type	not applicable		337 \$a
carrier type	yes	Manifestation		structured	RDA VES: Carrier Type	not applicable		338 \$a
extent of manifestation	yes	Manifestation		structured	RDA VES: Carrier Type or RDA VES: Carrier Extent Unit	not applicable		300 \$a

Sample: Supplementary handout

Screen capture of a
“String Encoding Schemes
for Access Points”
handout, designed to
provide key information
while avoiding the
cognitive load of directing
students to external
guidance documents

Steps for constructing elements that are “authorized access point for [an entity]”

1. Identify what the **base authorized access point** should be for the entity. (Base → “preferred”)
2. **Format the base authorized access point** according to one of the string encoding schemes defined in this guide.
3. **If needed** for disambiguation or clarification about the entity being described by the AAP, **add additional elements and/or designations**. (Consult RDA Toolkit for elements to add.)

Step 1 for a sample Person entity

The date of birth of this Person is unknown. The preferred name indicated on the title page and sources like the class syllabus and Quercus appears to be:

May Chan

This form will be the base.

Step 2 for a sample Person entity

According to the “String encoding scheme for authorized access point for person” below, the format should be:

Chan, May

WOULD A ROSE BY ANY OTHER NAME

REALLY SMELL AS SWEET?

a catalogue’s memoir

by

May Chan

INF2145 Press, Toronto, Ontario

Step 3 for a sample Person entity

Helpful resources

- [*Introducing RDA: A Guide to the Basics After 3R*](#), by Chris Oliver (Chicago: ALA Editions, 2020)
- [RDA Toolkit YouTube channel](#)
- [RDA Steering Committee \(RSC\) Presentations](#)
- [RDA-L](#) on ALA Connect
- [RDA regional representatives and WCEO](#)
- RDA Education and Orientation Officer

Conclusion

- RSC welcomes feedback on how to support educators and trainers. If you have questions or comments about RDA education and orientation, please contact Elisa Sze at elisa@rdatoolkit.org
- We welcome volunteers to help translate this presentation and the forthcoming handout for educators.