LIBRARY OF CONGRESS

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1. What is this RDA I keep hearing about?

RDA is "Resource Description and Access," the cataloging standard that has replaced the Anglo-American Cataloguing Rules, 2nd edition. RDA was built on the strengths of AACR2, but has new features that make it more applicable to today's digital environment, including close alignment to international data models such as the Functional Requirements for Bibliographic Records (FRBR) and the Functional Requirements for Authority Data (FRAD). Much more information about RDA and why it was needed is available on the site for the Joint Steering Committee for Development of RDA (JSC) at: http://www.rda-jsc.org/

The text of RDA is found via the RDA Toolkit, developed and made available by the Co-Publishers of RDA. In addition to the RDA instructions, there are many other useful resources in the RDA Toolkit, including an element set view, mappings between RDA and such standards as MARC 21 and MODS, workflows, and there are links to other useful related resources—even AACR2!

2. How do I find out more about the RDA Toolkit?

Check out the RDA Toolkit site at: http://www.rdatoolkit.org/
The site provides many resources, including news announcements, a blog related to the RDA Toolkit and its development, subscription information (including a free trial offer), training materials, etc. A print version of RDA is also available for purchase at the site.

The RDA Implementation Decision

3. Will the three U.S. national libraries be implementing RDA?

Yes, after the analysis of an extensive test involving 26 institutions, the Library of Congress, the National Agricultural Library, and the National Library of Medicine have agreed to implement RDA no sooner than January 2013, contingent on satisfactory progress/completion of the tasks and actions identified in the report of the US RDA Test Coordinating Committee.

Background information about the U.S. RDA Test is available at: http://www.loc.gov/bibliographic-future/rda/

4. Where can I find the report on the U.S. RDA Test?

The U.S. RDA Test site includes several documents at: http://www.loc.gov/bibliographic-future/rda/
The site contains the full public version of the report of the U.S. RDA Test Coordinating Committee, an executive summary of the report for those wanting a quick read, and the response to the Committee's recommendations from the executives of the three national libraries.

5. Now that we know when the U.S. national libraries plan to implement RDA, what does that mean for the rest of us?

Because several libraries involved in the U.S. RDA Test have continued to create RDA records since the record-creation phase of the test was completed at the end of December 2010, you will continue to see new RDA records. To help LC in carrying out its responsibilities for (1) the ongoing development of RDA, and (2) the creation and/or revision of training materials supporting documentation for LC, PCC, and the U.S. library community, a small number of the LC catalogers who participated in the U.S. RDA Test will return to using RDA for cataloging early in Fiscal Year 2012. While it is too early to predict at this point, it is likely that many U.S. libraries will coordinate implementation of RDA with the U.S. national libraries, while others may decide to implement earlier than that.

6. What is the Program for Cooperative Cataloging (PCC) doing about RDA?

The PCC has issued a statement affirming its support of the U.S. national libraries' decision to implement RDA, and will be collaborating on the implementation effort. PCC's goal during the transition to RDA is to develop and foster effective and efficient means of implementing a new set of instructions, while gaining the maximum benefit from them. The PCC has already formed three task groups to begin preparing for this transition, and others will be formed as warranted. The PCC Policy Committee is also preparing a set of PCC RDA FAQs to be posted on the PCC RDA web site—visit there often to see the updates:
http://www.loc.gov/catdir/pcc/RDA-PCC.html
The three new task groups can be found at:
http://www.loc.gov/catdir/pcc/RDA-Decision-TG.html
http://www.loc.gov/catdir/pcc/RDA-Acceptable-TG.html
http://www.loc.gov/catdir/pcc/RDA-Hybrid-bib-TG.html

7. When will the British Library, Library and Archives Canada, and the National Library of Australia implement RDA? We sometimes use their records for copy cataloging and would like to know what to expect.

In 2007, the British Library, Library and Archives Canada, the Library of Congress, and the National Library of Australia agreed on a coordinated implementation of *RDA: Resource Description and Access*. To ensure a smooth transition to RDA, the four national libraries will work together where possible on implementation matters such as training, documentation and any national application decisions.

The best source for information will be the announcements from the institutions involved as they consider the implications of the U.S. recommendations. Here is what is available now, but more information will be added in the future:

Library and Archives Canada: http://www.collectionscanada.gc.ca/cataloguing-standards/040006-1107-e.html

National Library of Australia and the Australian Committee on Cataloguing: http://www.nla.gov.au/lis/stndrds/grps/acoc/rda.html

8. Will non-English speaking countries implement RDA as well? We sometimes use their records for copy cataloging and would like to know what to expect.

Many countries around the world are interested in implementing RDA, and are currently evaluating their plans in light of the U.S. national libraries' decision. There are some regional groups, such as the European RDA Interest Group (http://www.slainte.org.uk/eurig/index.htm), that have been discussing the implementation of RDA for some time and will continue to meet in the months ahead. Various countries, representing different language groups, are talking with the publishers of RDA about official translations, and some are already underway!

The Future of RDA

9. Will RDA be updated in the future?

Yes! ALA Publishing has already released some enhancements since the RDA Toolkit was released in June 2010; an index, a table of contents, and some corrections (typographical errors, misplacement of margin lines for options, etc.) identified by the Joint Steering Committee have been included. A schedule for future updates, perhaps as often as every month, will be announced. The Joint Steering Committee will follow two approaches for updating RDA: a wiki/email process for corrections and simple changes; constituency review for proposals related to more substantive changes. It will be much easier to update RDA as an online tool than it was to update AACR2.

10. I hear that RDA isn't finished yet, is that true?

Yes, there are some "place holder" chapters in RDA for content that has yet to be developed. The incomplete chapters are related to what we generally call subjects-- concepts, objects, events, and places, the guidelines for recording the subject of a work, and relationships between subjects. In case you were keeping track, these 'missing' chapters are not in AACR2, either. In fact, RDA already has more content than AACR2 did, including "Acquisition and access information" (RDA Chapter 4), new attributes for persons, families, and corporate bodies, new attributes and instructions for authority data, and lots of information on creating relationships at many different levels.

11. How will RDA be governed in the future?

The Committee of Principals (CoP) is the body that oversees the development of RDA by the JSC. The CoP has representatives from the Co-Publishers of RDA (American Library Association, the Canadian Library Association, CILIP: Chartered Institute of Library and Information Professionals) as well as several national libraries (the British Library, the Library of Congress, Library and Archives Canada, and the National Library of Australia). The CoP will be meeting in August of 2011 to discuss any possible changes to the governance structure, and the JSC itself will meet in November of 2011.

12. I hear a lot about RDA vocabularies, linked data, semantic web, etc. What is happening in that regard?

Progress is being made as a group of international metadata experts work with the RDA Publishers and the JSC to register the RDA elements and vocabularies on the open web (http://metadataregistry.org/rdabrowse.htm) for use both within and outside of the library metadata community. Stay tuned for future announcements!

Training and Documentation

13. Will RDA training materials be available?

LC plans to make updated RDA training materials available on its website, as it did for the US RDA test; this material will be free. There will be additional training courses available from the PCC, e.g., the Serials Cataloging Cooperative Training Program (SCCTP) courses (new and/or existing courses updated with RDA information), other national libraries, library organizations, bibliographic utilities and consortia, etc. Here are some existing sources that may be useful; please note that many of these resources will be updated in the months ahead based on new decisions, changes to RDA and the MARC 21 format, lessons learned from the RDA test, etc.:

http://www.loc.gov/catdir/cpso/RDAtest/rdatest.html (includes training materials used for the US RDA test, and numerous webcasts that will help prepare trainees, in English and some in Spanish)

http://www.rda-jsc.org/rdapresentations.html (variety of presentations)

http://www.ala.org/ala/mgrps/divs/alcts/confevents/upcoming/webinar/cat/rda.cfm (ALA/ALCTS webinars on RDA, some are fee-based)

http://www.rdatoolkit.org/training (training materials for the RDA Toolkit)

http://www.loc.gov/catdir/pcc/RDA-PCC.html (information on PCC RDA training)

14. What documentation on using RDA will be available beyond RDA itself?

LC will work with the PCC to update documentation on a priority basis, including the Library of Congress Policy Statements (LCPSs) and other program documentation such as provider neutral guidelines, LC/PCC practice documentation for name authorities (i.e., the Descriptive Cataloging Manual Z1 and the LC Guidelines Supplement to the MARC 21 formats), and the standard record metadata application profiles.

15. What are the Library of Congress Policy Statements, and where can I see them?

The LCPSs are policy and practice decisions for RDA, much like the Library of Congress Rule Interpretations (LCRIs) were for AACR2. The LCPSs were designed to record LC's cataloging decisions for use during the U.S. RDA test by LC catalogers, although catalogers at some other test institutions followed them as well. They were used to express policies on such things as:

- additional RDA elements to be considered as "core" for LC;
- LC decisions on some optional additions, optional omissions, and alternatives;
- LC practice for instructions referring to "agency …" decisions;
- LC practice for some instructions in RDA with "or" clauses;
- Some additional guidelines that provided more detail or examples, especially as related to MARC 21 coding.

The lack of an LCPS indicates that catalogers should use their own judgment in applying the RDA instructions. LC will be reviewing and revising the LCPSs as necessary, informed by the experiences of RDA testers and their comments made during the test and in collaboration with the Program for Cooperative Cataloging.

The LCPSs are available free in the RDA Toolkit (see the "References" tab in the toolkit)—the LCPSs can be accessed even if you don't have a subscription to the Toolkit (http://access.rdatoolkit.org), although Toolkit subscribers will also be able to link back and forth between the LCPSs and the RDA text. The LCPSs are also available as part of *Cataloger's Desktop*, where they are fully linked to other useful resources, including RDA if you have a subscription to RDA.

The documentation site for the U.S. RDA Test also has PDF versions of the LCPSs, but note that the embedded links are not active:
http://www.loc.gov/catdir/cpso/RDAtest/rda_lcps.html .

16. Will other cataloging agencies issue their own policy decisions on RDA core elements, options, alternatives, etc.?

The LCPSs were designed for use by LC catalogers during the U.S. RDA Test, but anyone else may choose to follow them if they like; by extension, other libraries are not required to follow them.

LC hopes to coordinate with the PCC so that joint decisions are made whenever possible, and the policies will be reviewed and rewritten as necessary based on input from the PCC, as well as the analysis of the comments made by RDA testers during the U.S. RDA test.

The national libraries represented on the Joint Steering Committee (British Library, Library and Archives Canada, Library of Congress, and National Library of Australia) are planning to align their policy statements whenever possible, to minimize the differences in practice. The libraries have already begun analyzing the decisions made by LC during the test, and will have further discussions at the next JSC meeting in November 2011 about any differences in policies and how to reflect them in the RDA Toolkit or other documentation.

17. Will the Library of Congress Rule Interpretations continue to be developed and revised?

No, the Library of Congress does not plan to issue new or revised LCRIs as it turns its focus to developing documentation for use with RDA rather than AACR2. The LCRIs will remain in *Cataloger's Desktop* for those agencies still creating or needing to interpret AACR2 records.

18. Sometimes I understand RDA better by looking at examples of records—are some available for me to look at?

Yes, there are already some examples posted on the U.S. RDA Test site that include both AACR2 and RDA versions of records to illustrate the differences (see http://www.loc.gov/catdir/cpso/RDAtest/rdaexamples.html). Many more "pure RDA" records will be posted in the months ahead, illustrating a variety of formats and cataloging situations, as well as MARC 21 encodings. Full record examples will also be added to the RDA Toolkit in the future.

19. Does *Cataloger's Desktop* include RDA Toolkit? What other RDA-related support does Desktop provide?

RDA is currently included in *Cataloger's Desktop*. Access to RDA from within *Cataloger's Desktop* is only available to those who have a separate RDA Toolkit subscription from ALA Publishing. *Desktop* provides extensive, seamless linking to RDA from the MARC 21 formats, the LC Policy Statements, and several other resources. *Desktop* also allows you to perform federated searches of RDA and over 300 other cataloging documentation tools.

RDA-related resources in *Cataloger's Desktop* include:
- FRAD: Functional Requirements for Authority Data (2 languages)
- FRBR: Functional Requirements for Bibliographic Records (5 languages)
- JSC: Joint Steering Committee for Development of RDA
- LC Documentation for the RDA Test
- LCPS: Library of Congress Policy Statements
- RDA-L (RDA discussion list)
- RDA Vocabularies
- What is FRBR: A Conceptual Model for the Bibliographic Universe (5 languages)

Additional RDA-related resources will be added to *Cataloger's Desktop* as they are developed. More information is available at http://www.loc.gov/cds/desktop/web-faqs.html#QAs-RDA .

Impact on workflow, systems, catalogs

20. We're primarily interested in understanding how RDA records will impact our copy cataloging workflows—is there any help available?

> How RDA copy is handled at each institution may depend on local decisions about what additional core elements are desired, as well as practices for alternative instructions, optional additions, optional omissions, consortia and/or bibliographic utility guidelines, etc. Some of these decisions will be in flux as agencies determine the impact of RDA implementation at the local and national level, so it will be important to monitor these issues that may impact your copy cataloging policies and workflows. LC will be creating (and sharing) some documentation for staff at LC performing copy cataloging, and other institutions will be preparing documentation as well.
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> Note that the ALCTS CCS Heads of Cataloging Interest Group will devote a session to "Preparing Copy Catalogers for RDA" at the ALA Annual Conference in New Orleans (Monday, June 27, 2011, 8:00-10:00 a.m. in the Morial Convention Center Room 397).

21. I know there are some instruction changes coming with RDA that may have an impact on existing authority and bibliographic record headings, such as the spelling out of certain abbreviations (Dept., O.T., N.T., etc.)—how will this be handled?

> Yes, changes are coming, but the details have yet to be ironed out. Some of these changes are due to RDA, others (like spelling out Dept.) are really in AACR2 as well! Stay tuned for future announcements on how the LC/NACO Authority File (LC/NAF) will be updated. The PCC has appointed a task force to examine types of headings currently existing within the authority file (LC/NAF) that fall into various categories, including some that may be usable as-is, some that may require change to be used as valid access points in an RDA record, and other categories where the need for change is uncertain.

22. I saw some discussions during the test about new RDA forms of names and titles on existing AACR2 authority records that are different—what can you tell me about this?

> Yes, remember that one of the purposes behind the RDA test was to understand the implications of implementing RDA on our legacy data. Testers were encouraged to formulate and record RDA forms on existing AACR2 records to get practice with RDA, as well as to identify the types of decisions that would need to be made with respect to categories of changes that may not be necessary. Don't assume that just because an RDA form in a 7XX field is different from the AACR2 1XX form that a flip will be automatic! The coming months will see the development of policies, the timing of any maintenance to existing records, etc. These decisions are all dependencies to a successful implementation. The PCC has appointed a task force to examine types of headings currently existing within the LC/NACO Authority File that fall into various categories, including some that may be usable as-is, some that may require change to be used as valid in an RDA record, and other categories where the need for change is uncertain.

23. Can we pre-implement some things from RDA in AACR2 records?

While you can choose to do whatever you like with regard to records in your local systems, it is best to follow utility/consortium agreements when the records are reflected in shared databases. For the US RDA Test, if an existing AACR2 authority record needed to be used, catalogers were asked to formulate the RDA form for recording in an authority 7XX field (which was often the same as the AACR2 form), and catalogers were also allowed to add any new RDA-related elements in other fields in order to gain experience with the application of the RDA elements and instructions—the existing headings remained AACR2, as did the coding indicating the rule set used. The test policies for authority records are still in place, and can be found at: http://www.loc.gov/catdir/pcc/PCC-Post-RDA-Test.html

For bibliographic records, most test agencies discouraged the addition of RDA elements to existing AACR2 bibliographic records, unless the entire record was to be converted to RDA. Since many test participants used OCLC during the test, they also followed OCLC guidelines put in place before the test (they are still in place until further notice); the guidelines indicate which types of records may be converted to RDA, and discourage the addition of RDA elements to existing AACR2 bibliographic records. See the OCLC policy statement at: http://www.oclc.org/ca/fr/rda/policy.htm
SkyRiver is currently working on the assumption that customers will be best served by a two-record approach. So in the event that a fully cataloged RDA record and a fully cataloged AACR2 record both existed for the same bibliographic entity, both would be allowed in the database.

Please keep abreast of the policies of your utility, consortia, etc., during this interim period—policies may change as implementation strategies become clear.

The PCC has appointed a task force to begin looking at the question of "hybrid" records. You will be able to follow the PCC Task Group on Hybrid Bibliographic Records at: http://www.loc.gov/catdir/pcc/RDA-Hybrid-bib-TG.html

24. Will MARC 21 still be used for RDA bibliographic and authority records?

If you use MARC 21 now, you will still be able to do so for the foreseeable future, although RDA doesn't require the use of any specific encoding format. As you may be aware, the MARC bibliographic and authority formats have been updated extensively over the last few years to incorporate new elements from RDA—this process will continue as necessary.

LC will also lead an effort, known as the **Bibliographic Framework Transition Initiative**, to review the bibliographic framework in order to better accommodate future needs. A major focus of the initiative will be to determine a transition path from the MARC 21 exchange format in order to reap the benefits of newer technology while preserving a robust data exchange that has supported resource sharing and cataloging cost savings in recent decades. Information about that effort is available at: http://www.loc.gov/marc/transition/
(You can sign up for a listserv devoted to this topic at the site.)

25. How will I know if my local system is ready for RDA records or taking advantage of some beneficial aspects of RDA?

The best route will be to hear from your system vendors directly about how they have incorporated new MARC changes, and any changes/choices you may have for displaying RDA data. The RDA Toolkit publishers are also providing question/answer sessions with major integrated library system vendors on the RDA Toolkit site. Check out the vendor interviews at: http://www.rdatoolkit.org/taxonomy/term/29

You may be able to test your system's capabilities by trying to use some of the test records created U.S. RDA Test participants. The records are available for download at http://www.loc.gov/catdir/cpso/RDAtest/rdatestrecords.html. Please note that the records are posted as supplied by the test agencies and reflect that agency's interpretation and application of RDA—**no attempt has been made to confirm that the records actually conform to RDA** or that the MARC structure is valid (where appropriate). Records also represent the "sandbox" nature of the RDA test, where catalogers were trying out various policies and practices and not necessarily striving for consistency. More caveats about the content and structure of the records are found on the download site.

For the future …

26. The U.S. national library implementation of RDA seems like a long time in the future—what's going to happen in the interim?

January 2013 is going to be here sooner than you think! Because several of the US RDA Test participants are continuing to use RDA, more RDA bibliographic and authority records will be available. Many of us will gear up our training programs, revise documentation, and work on improvements to the RDA text itself (via the JSC). The PCC has already appointed three task forces to develop some of the implementation decisions that need to be made on a program basis during the coming months.

Conversations with participants at LC and at other institutions during the U.S. RDA Test helped the Library of Congress identify areas for policy decisions and revision proposals for RDA: possible changes in RDA to work on in collaboration with stakeholder communities, implications for workflows, the need for new and revised documentation/training materials, and situations needing consistency for shared data or "best practices." To help LC in carrying out its responsibilities for (1) the ongoing development of RDA, and (2) the creation and/or revision of training materials supporting documentation for LC, PCC, and the U.S. library community, a small number of the LC catalogers who participated in the U.S. RDA Test will return to using RDA for cataloging early in Fiscal Year 2012.

27. Will the U.S. RDA Test documentation site still be available?

Yes, it will be available for some time, but may not get many updates. We'll start a new page devoted to RDA Implementation—we'll be sure to let you know when that page is established so you can follow along on this adventure!

28. Can I still send questions about RDA to **LChelp4rda@loc.gov** or was that just for the U.S. RDA test?

Sure! LC hopes to continue to provide as much assistance as we can through the LChelp4rda account.