RDA Toolkit Workshop: A Crash Course

A half-day Preconference Workshop
ALA Midwinter, Philadelphia
January 24, 2020
Welcome!

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Head, Original & Special Collections Cataloging,
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Presenters and Helpers

• NARDAC members
  ▪ Dominique Bourassa (ALA): NARDAC Chair
  ▪ Thomas Brenndorfer (CCC): RSC Representative
  ▪ Stephen Hearn (ALA): backup RSC Representative
  ▪ Melanie Polutta (LC): NARDAC member

• RSC members, past and present
  ▪ Linda Barnhart: RSC Secretary
  ▪ Kathy Glennan: RSC Chair
  ▪ James Hennelly: Director, ALA Digital Reference
  ▪ Kate James: former RDA Examples Editor
  ▪ Honor Moody: RDA Examples Editor
Overall Plan for the Workshop

• Welcome/housekeeping/background
• Presentations followed by related exercises
  ▪ Exercise worksheets are in your handout packet
  ▪ We will review the answers before going to the next presentation
  ▪ Ask for help at any time

• Coffee/tea break halfway through

• Time for general questions and answers at the end
Topics

• Background
• RDA Beta Toolkit basics
  ▪ Exercise #1
• A quickstart guide to RDA terminology: Elements, SES, and VES
  ▪ Exercise #2
• Everything old is new again
• Whatever happened to...
  ▪ Exercise #3
• New concepts in the Beta Toolkit
  ▪ Exercise #4
• Wrap-up & general questions/answers
Background
What is RDA?

• The standard itself:
  ▪ A package of data elements, guidelines, and instructions for creating library and cultural heritage metadata that are well-formed according to international models. These metadata are intended to support the discovery and identification of resources in library and other cultural heritage collections.

• The Toolkit
  ▪ An integrated, browser-based, online product
  ▪ Includes RDA, and other cataloging-related documents and resources

• The RDA Registry
  ▪ Provides documentation about the RDA entities, elements, and vocabulary encoding schemes for application developers and linked data communities
Scope of RDA

**In scope**
- “Things” of bibliographic interest
- Data and functionality required by end-users to meet their information needs

**Out of scope**
- Administrative metadata
- Resource management metadata (e.g., acquisitions, preservation, circulation)
- Rights management metadata
- Subject access beyond RDA entities
Workshop Disclaimers

• This workshop focuses on the current version of the beta RDA Toolkit
  ▪ It is not ready for use in production environments
    o Still need application profiles, policy statements, etc., which are under development by various communities
  ▪ MARC 21 and BIBFRAME need further development to accommodate new RDA elements
    o New MARC/RDA Working Group prepared two discussion papers for this conference
  ▪ Expect more changes!
    o The beta RDA Toolkit is an integrating work, with at least quarterly updates expected each year

• We will do our best to avoid using MARC 21 terminology today
The 3R Project – Why?

• IFLA consolidated and updated RDA’s underlying functional requirements models (FRBR, FRAD, and FRSAD) and created the new IFLA Library Reference Model (LRM)
  ▪ Introduced new entities
  ▪ Greater emphasis on relationships rather than attributes
  ▪ Settled on a model for aggregates

• A chance to improve the functionality both within and behind the original RDA Toolkit

• An opportunity to better align RDA with linked data principles and to expand its reach internationally
3R Project Decisions

• Retain current RDA elements unless they conflict with LRM
  ▪ Redundant elements will be removed sometime after 3R Project ends
    o Unstructured description of an element (e.g., *type of recording*) preferred over old “details of” approach (e.g., *details of type of recording*)

• Generalize the instructions

• Move away from organizing instructions and guidelines in the form of a cataloging manual

• Recast “relationship designators” as *relationship elements*

• Offer more flexibility in choosing how to record a piece of information
Beta Toolkit: Current Status

• In the “stabilization” phase
  ▪ Reliable enough for policy statement writers and translators to use for their work
  ▪ Permitted changes
    o Those that do not have an impact on the outcome of applying the instructions
      • Correction of errors, improving consistency, and other modifications that will not have a significant impact on the p.s. writers and translators
    o Addition/revision of examples

• Expect to add some samples of policy statements by April 2020
Stabilization ≠ Official

• Stabilization *does not* mean starting the countdown clock on the original Toolkit
Becoming Official

- The official “switch over” date for the beta Toolkit is planned for 15 Dec. 2020
  - beta.rdatoolkit.org → access.rdatoolkit.org
  - Original Toolkit will become available at: original.rdatoolkit.org
  - The countdown clock *will not* start on this date either
Countdown Clock Questions

• Why delay starting the clock?
  ▪ Need to offer flexibility to communities/agencies completing translations, policy statements, and application profiles
  ▪ Allows for cataloging agencies to pace their transition from the original Toolkit to the official Toolkit
    o Develop and conduct cataloger training

• When will it start?
  ▪ Only after the RDA Board and the RSC agree on a date

• How long will the clock run?
  ▪ One year: Time left will display prominently on original.rdatoolkit.org site
Making Bigger Changes?

• By this fall, major changes to the English RDA text may again be considered (for implementation in 2021)
  ▪ Based on formal proposals from
    o RDA regions
    o RSC working groups
    o Other RDA users
  
• Stay tuned!