

RDA Toolkit in a Canadian Cataloguing Course

Elisa Sze, University of Toronto, Canada

2º Encuentro de Educación sobre Organización de la Información
3 April 2025

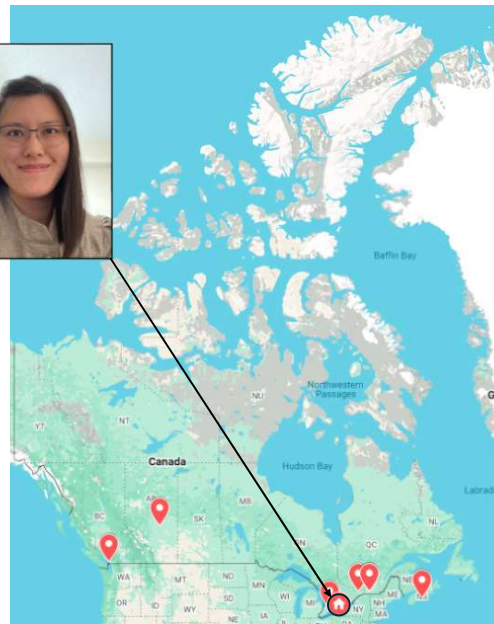
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¡Buenos días! Gracias por la invitación para dar esta presentación.

Thank you for the invitation to present at this conference. I am honoured to share about my experience with teaching the RDA Toolkit in a Canadian cataloguing course.

My background

- Metadata Librarian, University of Toronto Libraries
- Sessional Instructor, Faculty of Information, University of Toronto
- Education and Orientation Officer, RDA Steering Committee
- Member-at-large, Canadian Committee on Cataloguing
- Member of the RDA Training in Canada Working Group



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¡Buenos días! Gracias por la invitación para dar esta presentación.

Thank you for the invitation to present at this conference. I am honoured to share about my experience with teaching the RDA Toolkit in a Canadian cataloguing course.

My name is Elisa Sze, and I am a metadata librarian with the University of Toronto Libraries, the largest academic library system in Canada. I am also a sessional instructor at the University of Toronto, Faculty of Information, which is home to 1 of 8 ALA-accredited Library and Information Science programs in Canada.

My experience with training staff and teaching students to catalogue led me to join the RDA Steering Committee as their Education and Orientation Officer. I am also a Member-at-large on the Canadian Committee on Cataloguing, and I am currently part of a grassroots working group that is developing an RDA training program in Canada.

Context for this presentation

- This presentation includes general tips for teaching RDA.
- However, my main focus will be on sharing information on how I teach RDA in my cataloguing course at the University of Toronto.
 - Many thanks to my past and current teaching partners: May Chan (2021 & 2022), Juliya Borie (2023 & 2024), and Beth Shoemaker (2025).



The RDA Steering Committee at its November 2024 meeting in Washington DC. Photo: <https://www.rdatoolkit.org/news/rsc/Minutes/500-507>

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This presentation includes general tips for teaching RDA. If you have attended some of my presentations in the past, you may be familiar with some of the information that I share.

However, my main focus will be on sharing information on how I teach RDA in my cataloguing course at the University of Toronto. I would like to take this opportunity to thank my past and current teaching partners: May Chan, Juliya Borie, and Beth Shoemaker.

Master of Information (MI) Program at the University of Toronto

- This 2-year professional degree evolved from a library science program established in 1928.
- Currently there are 8 concentrations in the MI program.
- It is 1 of only 8 ALA-accredited Master's programs in Canada (1 of 7 taught primarily in English).



Faculty of Information, University of Toronto
Photo: <https://www.ischools.org/ischools-members/university-of-toronto>

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The Master of Information program at the University of Toronto is a 2-year professional degree program that evolved from a library science program that was established in 1928. Currently the MI program offers 8 concentrations, with library and information science being one of the most popular. The program at Toronto is 1 of 8 ALA accredited Master's program in Canada, and 1 of 7 to be taught primarily in English.

INF2145 Cataloguing and the Creation of Bibliographic Data

- This is an elective course in the Library and Information Science concentration.
- I co-teach the course with another practitioner.
- [Course syllabus](#) (scan the QR code to view)
 - 12 weeks of classes x 3 hours per class
 - 1 class is dedicated to IFLA Library Reference Model (LRM)
 - 3 classes are dedicated to RDA (official RDA Toolkit)
 - 2 classes are dedicated to encoding RDA data in MARC 21





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The course I teach within this program is called INF2145, Cataloguing and the Creation of Bibliographic Data. This is an elective course in the Library and Information Science concentration, but MI students in any concentration can enroll.

To view the course syllabus, you can scan the QR scan on the slide. The course syllabus for 2025 has not yet been posted, but if you select the Winter 2021, 2022, 2023, and 2024 syllabi, you will see the official RDA Toolkit cited in the course content.

The course runs for 12 weeks from January to April, and each class is 3 hours long. My co-instructor and I dedicate 1 class to explaining concepts in the IFLA Library Reference Model, 3 classes on RDA (using the official RDA Toolkit), and 2 class on encoding RDA data in MARC 21.

Approaches to teaching RDA depend on the type of educational or training program

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

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Approaches to teaching RDA must depend on the type of educational or training program. In my interviews with educators during my first 2 years on the RSC, I met with educators to hear about their cataloguing courses, and their philosophies about teaching. Based on these conversations, I would categorize the types of programs as follows:

1. Courses that emphasize theory
2. Courses focused on metadata schemas and systems
3. Courses that offer hands-on practice in resource description (or “traditional” cataloguing courses)
4. And finally, “on the job” training for practitioners

Courses that emphasize theory focus on concepts and critical perspectives on cataloguing and classification without necessarily a grounding in day-to-day practices or the pressure points faced by practitioners. Courses that focus on metadata schemas and systems may briefly talk about RDA, but not with any attention towards application of the standard. Courses that offer hands-on practice in resource description must necessarily factor in the limitations of time. and On-the job training for practitioners often have to be geared very pragmatically towards the tasks that staff need to be able to complete immediately.

My course attempts to offer a blend of theory and hands-on practice.

Assumptions	Pedagogical approach	Andragogical approach
The learner	Learning relies on the instructor. Instructors evaluate learning.	Self-directed learning and self-evaluation.
Experience	Students have no experience.	Learners have some experience.
Readiness	Students are told what to master.	Changes spark the will to learn.
Orientation	Learning follows a narrative or “natural” sequence of contents.	Learning is organized around real tasks and problems.
Motivation	Students are motivated by external pressures (e.g., grades).	Learners seek self-esteem and confidence.

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

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A useful design framework is to incorporate aspects of pedagogy and andragogy. Andragogy is a term introduced by Alexander Kapp (1799-1869), a 19th century German educator and editor. The concept was later developed into a theory of adult education in the 20th century by Malcolm Knowles (1913-1997), an American educator.

- In the pedagogical approach, learning relies on the instructor, and the instructor is the one who evaluates learning. In the andragogical approach, learners are self-directed, and learners assess their own learning through self-evaluation tools.
- In the pedagogical approach, students are assumed to have no experience in the topics taught, while in the andragogical approach, learners will have some experience.
- The pedagogical approach requires the instructor to identify the learning outcomes to master, while the andragogical approach assumes that learners are willing to learn whenever a change occurs.
- Pedagogical approaches often organize teaching around a sequence of topics that is natural to the subject. In the andragogical approach, learning is organized around specific real-life tasks and problems that need solving.
- In the pedagogical approach, students tend to be motivated by external pressures such as grades or the need to pass a course. In the andragogical approach, learners are motivated by their self-esteem, and their need for confidence and self-actualization.

Introductory courses tend to be taught with a pedagogical approach, but can be enhanced by incorporating tasks based on real-life situations—specifically because students want experience that they do not yet have. Conversely, job training programs tend to follow the andragogical approach, but some learners may appreciate best practices more when they understand underlying principles and can call on an expert to review their work during the learning process.

My pedagogical approach to INF2145

- Complement **passive** modes of learning with **active** modes such as group note-taking, group discussions, and practical application.
- Dedicate time to guide students through practice (including **how to navigate** and **read** RDA Toolkit strategically) and feedback. *These experiences cannot be replicated by asking students to read a textbook or watch a video.*
- Utilize aspects of “flipped classroom” in our approach.
- Highlight key points in pre-recorded lectures (mp4 video files), then reinforce during class.
- Theory is important. Students will not be experts in 12 weeks, but give them time to practice applying the theory, and they will (1) have a better understanding of the theory and (2) retain underlying principles that will help them make decisions.

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My pedagogical approach to INF2145 is to complement passive modes of learning (such as listening) with active modes such as encouraging group note-taking, facilitating group discussions, and creating opportunities for practical application.

I like to dedicate time to guide students through practice – including specifically how to navigate and read the RDA Toolkit strategically, and provide feedback. These experiences simply cannot be replicated by asking students to read a textbook or watch a video.

I like to utilize aspects of the “flipped classroom”. I create pre-recorded lectures (mp4 video files) in which I highlight key points in a lesson, which I then reinforce during our in-person class time.

Theory is important. Students will not be experts in 12 weeks, and they will forget the finer points of certain instructions. However, by giving them time to practice applying the theory, they will (1) have a better understanding of the theory, and (2) retain underlying principles that will help them make decisions.

Making the “flipped classroom” effective

- Our students are graduate students. Many work part-time or have had other careers or graduate degrees before joining the program.
 - Therefore, they tend to be disciplined, and they understand the amount of effort involved in preparing for a class at the university level.
- My co-instructor and I post class slides before class, and generally provide opportunities for application in each class.
- Students have to be willing to complete required readings and watch the pre-class lectures prior to class, but we recognize that some instructor-led review is also necessary.

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The “flipped classroom” approach does not guarantee success though. The only reasons why my co-instructor and I have been able to make successful use of flipped classroom techniques are because:

- (1) Our students are graduate students. Many work part-time or have had other careers or graduate degrees before joining the Master program. Therefore, our students tend to be disciplined, and they understand the amount of effort involved in preparing for a class at the university level.
- (2) My co-instructor and I post our slides before class, and generally provide opportunities for students to apply what they learn in each class.
- (3) Students have been willing to complete required readings and watch the pre-class lectures prior to class, but we recognize that some instructor-led review is also necessary, especially during the busiest moments of the academic term.

What constitutes a flipped classroom?

- Students watch a short video lecture (between 20-45 minutes) and complete required readings before class.
- The beginning of class is a review, incorporating formative assessment questions that reinforce certain key points.
- Class activities:
 - Instructor-led activity gives us more control over use of time but requires more facilitation on our part.
 - Small group activity give students more freedom, but they must be pro-active and disciplined in their use of time for it to be effective.
 - Instructor-led demonstrations are valued by students because students learn by example how to consult, read, and interpret the RDA Toolkit.
 - An answer key is published after class for students to consult.

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What constitutes a flipped classroom?

Typically, we post a short video lecture (between 20-45 minutes long) that we ask students to watch before coming to class. The videos are posted one week in advance, so that students can gauge their time. We also ask students to complete required readings before class. The required readings almost always come directly from the standard, because we want students to explore the RDA Toolkit and attempt to decipher the language of the text before we do a guided walkthrough in class.

The beginning of each in-person class consists of a review, incorporating formative assessment questions that reinforce certain key points.

Class time is valuable, because we can set up activities that require students to apply their understanding of RDA:

- Instructor-led activities gives us more control over use of time, but it also requires more facilitation on our part.
- Small-group activities give students more freedom to explore on their own, but they have to be pro-active and disciplined in their use of time in order for these exercises to be effective.
- Instructor-led demonstrations have been valued by students because students learn by example how to consult, read, and interpret RDA.
- An answer key is published after class for students to consult.

LRM & RDA content in INF2145

Theme	Instructor's goals
(Week 2) IFLA LRM and Introduction to RDA Toolkit	<ul style="list-style-type: none">• Highlight LRM concepts found in RDA• Emphasize the resource entities• Demonstrate how to find Entities and Guidance pages in RDA Toolkit <p>Pre-recorded lectures:</p> <ul style="list-style-type: none">• A brief history of bibliographic control• Conceptual model: IFLA LRM

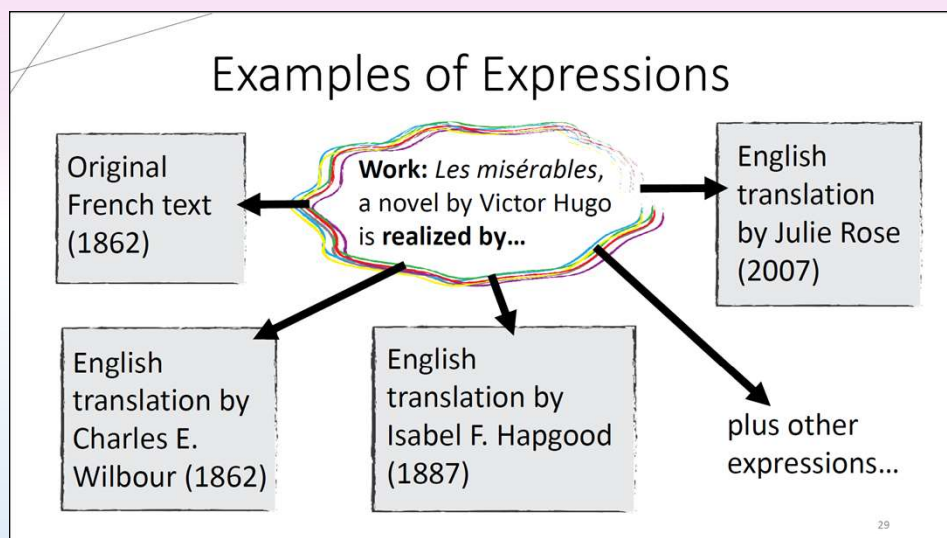
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Now I will talk about how I specifically organized the classes on RDA.

To “set the scene”, I introduce students to the IFLA Library Reference Model, highlighting important concepts such as the entity-relationship model, the purpose of attributes and relationships, and the entities themselves. I place greater emphasis on the resource entities Work, Expression, Manifestation, and Item because these entities inform cataloguing decisions right from the outset and will resurface in RDA.

Note that the pre-recorded lecture video links are live, and you are welcome to view them. The production quality is not high because I used Zoom to record my videos, but the quality has been sufficient for the purpose.

Introducing students to the resource entities, building upon an example mentioned in Holden (2020)



This is a sample slide. Taking an example of a “work” mentioned in an article that was cited in one of the pre-class lectures, I build upon the example to explain the other resource entities.

Contents to point out:

- A work can be realized by many expressions, illustrated by the grey boxes on the slide. Each box stands for an expression.
- Each expression is known by the language, and its translator. Each expression is also associated with a date of when the translation came into existence.

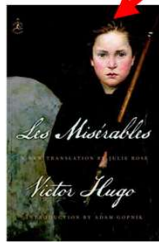
Article referenced:

Holden, C. (2020). The Bibliographic Work: History, Theory, and Practice. *Cataloging & Classification Quarterly*, 59(2–3), 77–96.
<https://doi.org/10.1080/01639374.2020.1850589>

Following the same example through the other resource entities

Examples of Manifestations

Les misérables, the English expression that is the Julie Rose translation (2007) is **embodied by...**



Vintage
Classics
publication
(2008 for
Canadian
market)



Vintage
Classics
publication
(2009 for UK
market)

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Selecting one of the examples of expression shown on the previous slide, I show 2 different manifestations that embody the same expression.

Key points to highlight:

- Same publisher but different publication year, and different market

Following the same example through the other resource entities



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Building off the same example, we select one of the manifestations, and look at multiple items that exemplify the same manifestation:

- A copy at Robarts Library
- A copy at E.J. Pratt Library
- A copy at Toronto Reference Library
- plus other libraries potentially

Identifying the resource entities through roleplay

Identify the WEMI entities in this scenario

User: Hi, do you have *West Side Story* here?

Reference staff: Are you looking for one of the movies, the musical, or audio recordings?

User: I want the old movie. I want to compare it with the new one directed by Steven Spielberg.

Reference staff: Let me see... You want the 1961 movie adaptation of the musical then. Starring Natalie Wood and Richard Beymer, directed by Robert Wise. Is that the one?

User: Yeah, that's it!

Reference staff: With your library card, you can access the 1961 adaptation through our library subscription of the Criterion Collection, an online streaming service.

User: Do you have it on DVD? My Internet at home is kind of slow.

Reference staff: Unfortunately, we only have one DVD copy and it's checked out until next week. If you'd like, you're welcome to stream videos on one of the public terminals here.

User: In that case, can you show me how to get to the Criterion Collection?

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To change the atmosphere and engage students who might be less ready to participate in the theory, I have students do a short role play. I ask 2 volunteers to read this script out loud. After reading the script out loud, we facilitate a class discussion to try to identify all the unique instances of work, expression, manifestation, and item that are considered during this dialogue.

This dialogue also stimulates discussion about the LRM user tasks (Find, Identify, Select, Obtain, Explore).

LRM & RDA content in INF2145

Theme	Instructor's goals
(Week 3) RDA Session 1: Introduction to Description	<ul style="list-style-type: none">• Define RDA entities and elements; 4 recording methods; 2 transcription methods• Read selected RDA instructions with students to explain how to “parse” the technical language + unique phraseology• Practice description using an application profile + a real book Pre-recorded lectures: <ul style="list-style-type: none">• How to read an element page• Nomens and appellations• Application profiles

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In Week 3, we dive into RDA. I define RDA entities and elements, discuss the 4 recording methods and 2 transcription methods. In this week, I try to demonstrate how to search in RDA Toolkit, how to read and “parse” the technical language and unique phraseology of RDA. We also examine the course application profile, and start to use the application profile to assist us with description of a real book.

The pre-recorded lectures that students watch before coming to class are listed on this slide.

Reviewing students' understanding of LRM entities

Formative Assessment

Which of the following are “resource entities”?

Res

Nomen

Manifestation

Person

Agent

Expression

Collective Agent

Work

Item

Time-span

Place

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Formative assessments are designed for students to quickly check their grasp of new, foundational information in a low pressure, ungraded environment.

In this example, we asked students to identify the LRM “resource entities”, because those entities would be the ones that students would most often describe in the context of our course.

Elements

- What are elements? Which elements are required for minimum description?
- Distinguish RDA **element supertypes** (broader elements) from **element subtypes** (narrower elements)
 - Instructions pertaining to an element supertype apply “down” to its element subtypes.
- Train students to read the **Definition and Scope** and look up the **Element Reference** card

The screenshot shows the RDA Element Reference Card for 'other title information'. At the top, the breadcrumb 'Entities > Manifestation > other title information' is visible. The title 'other title information' is in large blue font. Below it, the section 'Definition and Scope' is followed by the text: 'A word, character, or group of words or characters that appears in conjunction with, and is subordinate to, a title proper of a manifestation.' Below this is the 'Element Reference' section, which includes the IRI 'http://rdaregistry.info/Elements/m/P30142', the Domain 'Manifestation' with a right-pointing arrow, and the Alternate label 'has other title information'. At the bottom, there is a '+ IFLA LRM' link. Two red arrows from the text in the list to the left point to the 'Definition and Scope' and 'Element Reference' sections of the card.

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For students new to entity-relationship models, and classes and properties, a very basic question to answer is “What are elements?”

Next, is the question of “Which elements do we need to record when describing resources?” and “What is minimally required?”

As you know, RDA offers many choices. To choose which elements to record, students have to be shown that there is a hierarchy of element supertypes and element subtypes.

Instructions pertaining to an element supertype apply “down” to its element subtypes (if you are familiar with Dewey Decimal Classification, this is similar to the principle of “structural hierarchy”)

Instructors guide students in the choice between “broader” and “narrower” elements according to the data environment selected for the course.

The Element Reference Card, visible on every element page, includes key information; I try to be very deliberate in bounding out information in the Definition and Scope and the Element Reference card because from experience, I have seen students and cataloguers rush ahead to the record methods and many options without checking if they are at the correct element.

Demonstrate how to navigate the RDA Toolkit

Basic features to highlight for students:

- **Help pages:** “Navigating RDA Toolkit”, “Searching RDA Toolkit”
- **Guidance chapters:** Toggle between “Default” view and “Orientation” view.
 - Read all pages associated with “[Introduction to RDA](#)” and “[Terminology](#)”.
- **Entity pages:** Point out “Definition and scope”, “Minimum description”, “Entity boundaries”, and “Elements”.
- **Show how to search** by element reference labels or alternate labels, and how to filter search results.
- Show how to display **policy statements**.

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Students should also be shown how to navigate the Toolkit.

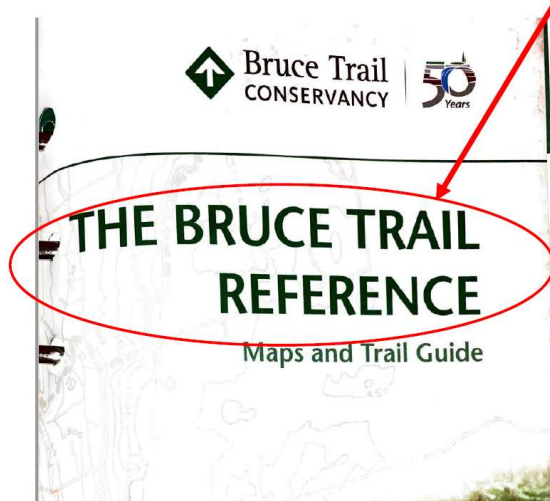
- Point out **Help** pages, so that students learn to use the Toolkit as an online reference tool. Point out **Guidance** chapters, which provide important background information as well as general instructions around resource description.
- The default arrangement of the guidance chapters is mainly alphabetical, but as of the September 2023 release, an “Orientation view” (arranged thematically) can be turned on.
- Show students the Entity pages.
- Point out the Minimum description requirements, and the list of Elements describing the domain entity.

Students who have grown up with the Internet are very comfortable with searching, and using Search boxes to locate information almost as a natural reflex. Show them how to search by element reference labels or alternate labels, and to filter results.

Finally, explain the difference between the RDA base text (which refer to the entity pages, element pages, and Guidance chapters) versus the Community Resources area of the Toolkit.

Low pressure assessments during class time

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

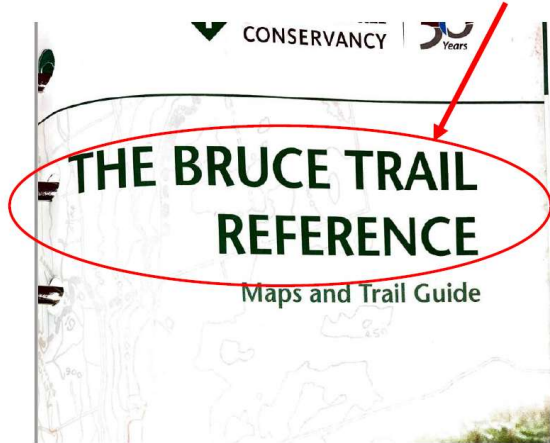
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In this example from Week 3, I wanted to test students' ability to distinguish between different RDA recording methods... This may seem like a basic question, but asking the question ensures that all students are starting from the same foundation.

Low pressure assessments during class time

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

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... Similarly, this question was asked to ensure that students understood the difference between transcription methods.

Varying the class activities

Goal: To encourage students to move around the room and talk to each other about RDA.

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:

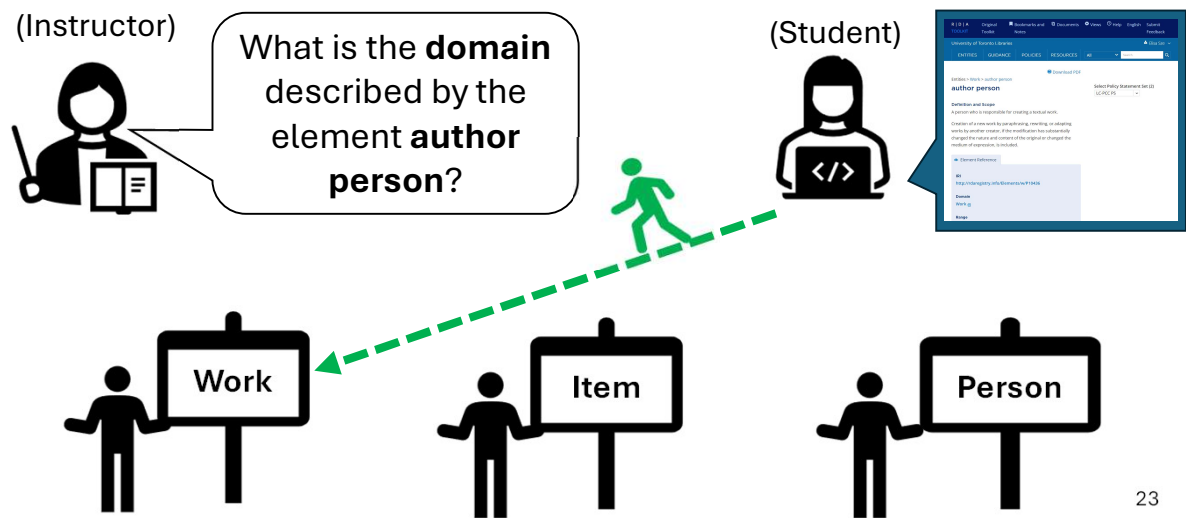
- If you have an RDA entity label, stand at the front or sides of the classroom, and hold up your sign so that your entity label is visible.
- If you have an RDA element label, look up the domain entity for your element, then join your domain.

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Other examples of formative assessment included in-class activities and exercises that forced students to look up information in RDA Toolkit, interact with their colleagues, and move around in the physical classroom.

In this activity, I used physical motion as a way of keeping students awake during their evening class, but students also found it memorable.

Ask students to match elements to their domain entities.
Physical movement is used to reinforce learning.



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Here is an in-class activity that we introduced teaching students about RDA entities and elements. The physical activity took advantage of the “brain-body connection”.

As the instructor, I assigned each student a sign containing the reference label of an entity, or the reference label of an element. [See the top left quadrant of the diagram.]

Students with an entity label were asked to stand in front of the classroom. [See the bottom half of the diagram.]

Students with an element label were asked to log into RDA Toolkit to look up the domain entity described by their element, and then to walk over to their domain entity. [See the green diagonal line running across the middle of the diagram.]

In doing this, students learned how to look up the element reference card within an element page. They also learned about domain versus range.

In the example I have illustrated here, the student has been assigned the element “author person”. They must determine whether the domain described by this element is Work, Item, or Person. After they have made the determination, they walk over to the correct entity.

Application profile: customized for the course

	A	B	C	D	E	F	G	H	I
	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	
1									
2	Identifying Manifestations and Items								
3	title of manifestation		Manifestation					This is an element supertype. Record instead the element subtype "title proper", and if applicable, "variant title of manifestation".	
4	title proper	yes	Manifestation	Nomen	unstructured	not applicable	normalized		
5	other title information	yes	Manifestation		unstructured	not applicable	normalized		
6	statement of responsibility relating to title proper	yes	Manifestation		unstructured	not applicable	normalized		
7	variant title of manifestation	yes	Manifestation	Nomen	unstructured	not applicable	normalized		
8	mode of issuance	no	Manifestation		structured	RDA VES: Mode of Issuance	not applicable		
9	identifier for manifestation	yes	Manifestation	Nomen	identifier	not applicable	not applicable	For URLs of online resource, see the element "Uniform Resource Locator".	
10	edition statement	yes	Manifestation		unstructured	not applicable	normalized		
11	publication statement		Manifestation					This is a superelement. Follow RDA instructions for recording the subelements "place of publication", "name of publisher", "date of publication".	
12	place of publication	yes	Manifestation	Place	unstructured	not applicable	normalized		
13	name of publisher	yes	Manifestation	Nomen	unstructured	not applicable	normalized		

[RDA Application Profile for Weeks 3-5](#)

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- Application Profile – link is live, and will remain active until April 8. You are welcome to view the file.
- The file is customized for the course. It is not a “real” application profile in this sense, but it covers everything that students need to know in order to describe a print book for their first graded assignment.
- It took at least 2 hours (if not longer) for the first version of the application profile to be created because it took time to determine which elements to record that would result in a metadata description set that resembles a bibliographic record.
 - This version is the result of many iterations that we have improved on with each year that we have taught the course.

Examples that instructors can consult before developing their own application profile

- ALA eCourse “A Practical Approach to New RDA” [template](#), Elisa Sze & May Chan (August 2022)
- [Draft Music Library Association application profile](#)
- Ontario Library Association Super Conference, pre-conference workshop ([2023](#), [2024](#), and [2025](#))
- [RDA Toolkit Webinar example](#), Melissa Parent (October 2021)
- National Library of New Zealand [Cataloguing-in-Publication Metadata Application Profile](#)
- [RDA DACH Anwendungsprofile](#) (Version: 2024/2)

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Application profiles help to focus students’ attention by identifying key elements to record, thereby reducing students’ cognitive load. An application profile specifies the entities, elements, and vocabulary encoding schemes that are expected in a set of metadata. It provides students with a structure or roadmap for resource description.

Some educators may find the concept confusing, because they think that an application profile has to be a complex set of specifications for system designers, but for teaching purposes, an application profile can be as simple as a list of assigned elements or a template for students to fill in.

The application profile can also specify recording methods, transcription guidelines, policy statements to follow, external guidance documents to consult in conjunction with RDA text, and sources of controlled vocabulary.

On this slide, I have provided some links to application profiles or templates that serve the purpose of an application profile. These examples are listed only for demonstration purposes.

LRM & RDA content

Weekly Theme	Instructor's goals
(Week 4) RDA Session 2: Elements	<ul style="list-style-type: none">• Explain nomens and appellations• Work with students through the process of constructing authorized access points for Person, Corporate Body, Work, and Expression. Emphasize patterns in the process.• Show students features of legacy standards (Example: Records created according to AACR2 instructions)• Pre-recorded lecture: Authority control

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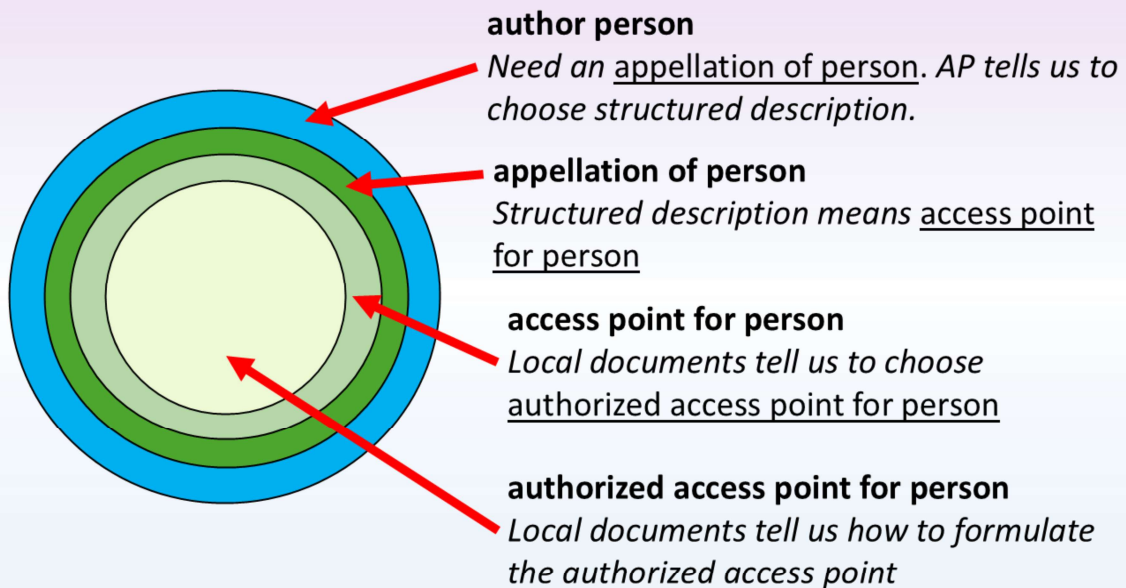
In Week 4, we review the concept of nomen and appellations again. This is because the concept of the nomen is difficult to grasp, even for experienced cataloguer, and I want to be sure that students will not feel “stuck” because they cannot understand what a nomen is.

In this week, I show students how to think through the process of constructing authorized access points for Person, Corporate Body, Work, and Expression. Emphasizing patterns in the process can be invaluable for learning.

We also dedicate some time to showing students the features of legacy standards, as seen, for example, in records created according to AACR2 instructions.

The pre-recorded lecture focuses on “Authority control”.

(Sample slide) **Recording a value for: author person**



Here is a sample slide depicting the explanation I provide to students. Here is part of a sample script:

Summary: Putting all these instructions together in our bibliographic description / metadata description set...

- Where you are required to record a value for the element “author person”, you will:
 - >> Navigate to “appellation of person”
 - >> Then to “access point for person” (because access point = “structured description”)
 - >> Then to “authorized access point for person” (because “authorized” = selected for preference over variant access point)

Example: If I want to show that a literary work (let’s say, the novel *Pachinko*, is written by the author Min Jin Lee. Can someone walk me through that process please?

(Answer should eventually lead us to consult LC Authorities, LCCN n 2006086697)

(The next few slides, with the pink/blue background, are all samples of slides that I have used in my class.)

(Sample slide) What is a person?

- **Definition:** “An agent who is an individual human being who lives or is assumed to have lived.”

- **Minimum description:**

- **Appellation of person**

- Name of person
 - Preferred name of person
 - Access point for person
 - **Authorized access point for person**
 - Identifier for person

RDA Implementation

Scenario C: We record in a **name authority record**

elements that describe the **agent** (*Note: We are not building name authority records for this class*)

The value of this element is what we plug into the **bibliographic record**, to explain the relationship between **the resource described** and the agent's role in the resource

(Sample slide) **Authorized access point for person**

RDA Toolkit: Scroll down until you see “**Base authorized access points for person**”.

The Base AAP is your starting point!

For general guidance on structured descriptions, see Guidance: Recording methods. [Recording a structured description](#).

- [Base authorized access points for person](#)
 - [Persons with two or more preferred names](#)
- [Format of base authorized access points for person](#)
 - [Names of person that include a surname](#)
 - [Preferred names of person that include a compound surname](#)
 - [Preferred names of person that include a surname with a separately written prefix](#)

(Sample slide) **Authorized access point for person**

Still under “Base authorized access point for person”...

“Use a **value of** Person: **preferred name of person** to form a base access point.”

Base authorized access points for person	
OPTION Use a value of Person: preferred name of person to form a base access point.	Send to Back LC-PCC LC/PCC practice: Apply the option. -----

“Preferred name” = preferred for use = implies cultural conventions. Go to the element page **preferred name of person** to help you determine what the preferred name should be **if** the person has 2 or more names, names in 2 or more languages, names in a non-preferred script, or names with 2 or more spellings.

(Sample slide) Authorized access point for person

Still under “Base authorized access point for person”...

“Use a value of Person: **preferred name of person** to form a base access point.”

Base authorized access points for person	
<div>OPTION</div> <div>Use a value of Person: preferred name of person to form a base access point.</div>	<div>LC-PCC</div> <div>LC/PCC practice: Apply the option.</div> <div>Send to Back</div>

“Preferred name” = preferred for use = implies cultural conventions.

Go to the element page **preferred name of person** to help you determine what the preferred name should be **if** the person has 2 or more names, names in 2 or more languages, names in a non-preferred script, or names with 2 or more spellings.

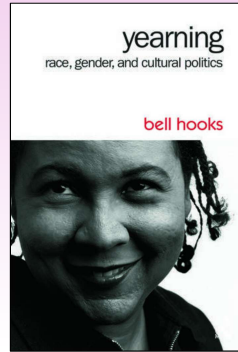
(Sample slide) Determine **preferred name of person**

- Sometimes, the **preferred name of person** has the same value as the value for **name of person**, but... names are complex because people are complex.
- Read through the conditions listed for this element, then decide which option to follow. Privilege LC-PCC practice when listed.

Conditions:

- Persons with two or more names
 - Names of person in two or more languages
 - Names of person in a non-preferred script
 - Names of person in two or more spellings
- Additionally, you may need to review broader conditions under the element supertype (i.e., broader element) **name of person**

(Sample slide)
What is the
**preferred
name?**



**Gloria Jean
Watkins**

bell hooks

American feminist, activist, and academic. Born in 1952, died in 2021. Birth name: Gloria Jean Watkins. Published under the pseudonym bell hooks.

Hint: Predominant name

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This is a sample slide.

Hints to share: Predominant name

https://access.rdatoolkit.org/en-US_ala-08a3dcc9-4cb0-355c-bf4f-adae2c63e5f6/p_opm_c34_wfb

Condition: “Two or more values of a name appear in sources of information.”

Condition Option: “Record a value that appears most frequently in sources of information.”

LC-PCC: “Cataloger’s judgment.”

Answer: bell hooks

Gloria Jean Watkins would be recorded as a variant access point for the person in the name authority record for the person, but not be used in a bibliographic record itself.

If you look up “name of person” >> “variant name of person” >> Option:

“Record a value that is considered important for identification and that differs from a preferred name.”

https://access.rdatoolkit.org/en-US_ala-e0529844-86d7-3cad-a811-6471b8844da4/div_ed5_yfd_vgb

(Sample slide)
What is the
**preferred
name?**



Tang dynasty Chinese poet. Born in 701, died in 762. 李 (Li) is the poet's surname. Assume we are cataloguing in English, and the preferred script is the Latin script.

Hint: See Names of person in a non-preferred script

Li Bai

李白

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This is a sample slide.

Name of person in a non-preferred script

https://access.rdatoolkit.org/en-US_ala-08a3dcc9-4cb0-355c-bf4f-adae2c63e5f6/p_ywx_ln4_wfb

Condition: “A value of a name appears in a script that differs from a script that is preferred by an agent who creates the metadata.”

Condition Option: “Record a value that is in a script that is preferred by an agent who creates the metadata.”

LC-PCC Practice: “Apply the option. The preferred script is the Latin script. When transliteration is necessary, follow the ALA-LC Romanization Tables...”

Answer: Li Bai

李白 would be recorded as the alternative script, if the system permits parallel fields to be added for alternative scripts in a bibliographic record. It may also be recorded as a variant access point in the name authority record for this person, but not appear in the bibliographic records describing the works of this person.

If you look up “name of person” >> “variant name of person” >> Option: “Record a value in a script that differs from a preferred name.”

https://access.rdatoolkit.org/en-US_ala-e0529844-86d7-3cad-a811-6471b8844da4/div_r43_zfd_vgb

(Sample slide) **Format Base AAP, add elements if needed**

- Format the Base AAP – **read the conditions**

- Names that include a surname
- Term of rank of nobility
- No surname nor term of rank of nobility
- Patronymic
- Initials, separate letters, numerals
- Name consists of a phrase

Refer to our “**String Encoding Schemes**” handout!

LC-PCC string encoding scheme is **Surname, Given name** unless otherwise indicated.

- Add elements as needed. A few options...

- Date of birth
- Date of death
- Fuller form of name
- Period of activity
- Profession or occupation

LC-PCC policy: Add date of birth/death if known, regardless of whether dates are needed to break a conflict.

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This is a sample slide. (Note that many of the string encoding schemes reference LC-PCC policies because in our course, we refer to the LC-PCC policy statement set to complement RDA.)

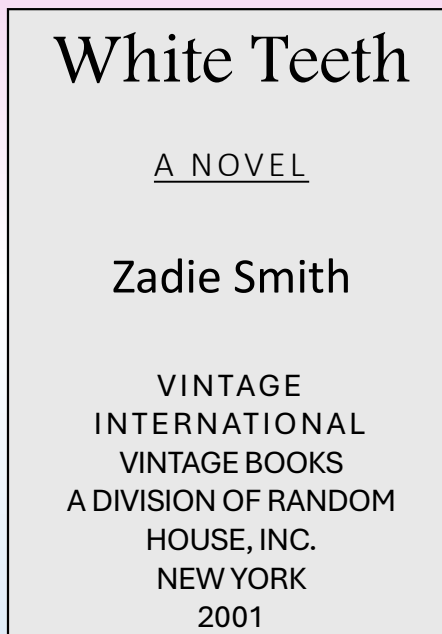
We introduce students to a String Encoding Scheme handout that we designed specifically for this course. The purpose of developing a SES handout is to reduce the cognitive load for students so that they do not have to consult the PCC MGD or other external guidance documents.

In the absence of SES, students can also consult RDA Toolkit > Resources > [Community resources](#) > [Community refinements](#) > [Person refinements](#) > [authorized access point for person: Anglo-American legacy instructions](#)

(Sample slide) Determining the **preferred title of work**

- Modern work (published in 1501 or later)
- Title proper of manifestation:
White teeth
- Manifestation has no variant title
- Single author
- Value for preferred title of work = value for title proper of manifestation

Preferred title of work?



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(See next slide for multiple choices)

(Sample slide) Determining the **preferred title of work**

What is the **preferred title of work**?

- a. White teeth
- b. White teeth : a novel
- c. White teeth : a novel / Zadie Smith

White Teeth

A NOVEL

Zadie Smith

VINTAGE
INTERNATIONAL
VINTAGE BOOKS
A DIVISION OF RANDOM
HOUSE, INC.
NEW YORK
2001

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What is the preferred title of work?

- a) White teeth
- b) White teeth : a novel
- c) White teeth : a novel / Zadie Smith

--

(A) is correct the answer.

(Sample slide) Determining the **preferred title of work**

- Modern work
- Title proper of manifestation?
- Does the manifestation have variant titles?
- 2 authors

Preferred title of work?

Reading and Writing CHINESE

A Comprehensive Guide to the Chinese Writing System

Traditional Character Edition

WILLIAM McNAUGHTON
and LI YING

TUTTLE Publishing
Tokyo Vermont Singapore
Revised edition 1999

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What is the preferred title of work?

See next slide for multiple choices.

(Sample slide) Determining the **preferred title of work**

What is the preferred title of work?

- a. Reading and writing Chinese, a comprehensive guide to the Chinese writing system
- b. Reading and writing Chinese
- c. Chinese

Reading and Writing CHINESE

**A Comprehensive Guide to
the Chinese Writing System**

Traditional Character Edition

**WILLIAM McNAUGHTON
and LI YING**

TUTTLE Publishing
Tokyo Vermont Singapore
Revised edition 1999

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What is the preferred title of work?

- a) Reading and writing Chinese, a comprehensive guide to the Chinese writing system
- b) Reading and writing Chinese
- c) Chinese

--

(B) is the correct answer

(Sample slide) Determining the **authorized access point for work**

Example: Single work, 1 author

Preferred title of work:

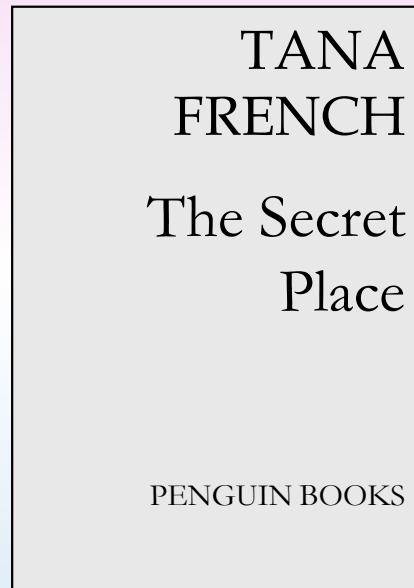
The secret place

Authorized access point for agent:

French, Tana

Authorized access point for work:

French, Tana. The secret place



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My co-instructor and I provide a “string encoding schemes” handout that summarizes the syntax for AAP for work.

(Sample slide) Determining the
authorized access point for work

Example: Single work, 2 authors

Determine the primary author

Preferred title of work:

Authorized access points for
agents:

McNaughton, William, 1933-
Li, Ying (Marie Li)

Authorized access point for work:

**Reading and Writing
CHINESE**

**A Comprehensive Guide to
the Chinese Writing System**

Traditional Character Edition

**WILLIAM McNAUGHTON
and LI YING**

TUTTLE Publishing
Tokyo Vermont Singapore
Revised edition 1999

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What is the preferred title of work?

Now, follow the SES for the syntax of our AAP for work. ***[See next slide for multiple choice answers...]***

(Sample slide) Determining the
authorized access point for work

What is the **authorized
access point for work**?

- a. Reading and writing Chinese
- b. McNaughton, William, 1933-. Reading and writing Chinese
- c. Li, Ying (Marie Li). Reading and writing Chinese

**Reading and Writing
CHINESE**

**A Comprehensive Guide to
the Chinese Writing System**

Traditional Character Edition

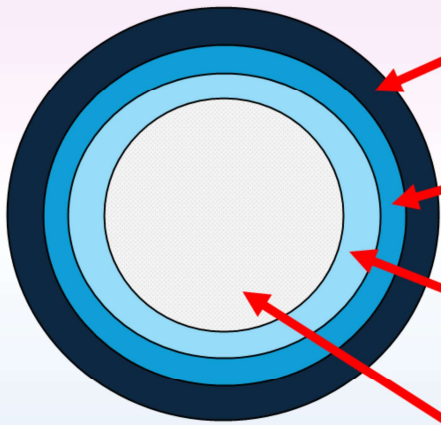
**WILLIAM McNAUGHTON
and LI YING**

TUTTLE Publishing
Tokyo Vermont Singapore
Revised edition 1999

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Answer: (b)

(Sample slide) Recording a value for: **work manifested**



work manifested

Need an appellation of work. AP tells us to choose structured description.

appellation of work

Structured description means access point for work

access point for work

Local documents tell us to choose authorized access point for work

authorized access point for work

Local documents tell us how to formulate the authorized access point

LRM & RDA content

Weekly Theme	Instructor's goals
(Week 5) RDA Session 3: Relationships Between Entities	<ul style="list-style-type: none">• Explain aggregates very generally, so that students recognize aggregates when they see one• Explain diachronic works very generally, so that students recognize diachronic works when they see one• Show students different material formats and have them identify attributes associated with those formats• Pre-recorded lecture: Aggregates

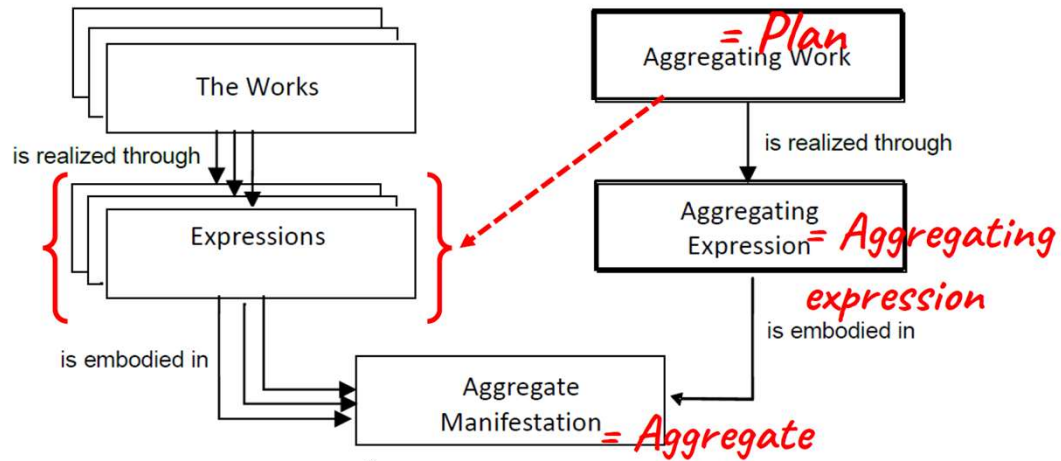
44

In Week 5, we talk about the more challenging topics of RDA: aggregates and diachronic works. The purpose is not to require students to know how to catalogue aggregates or diachronic works, but rather, to be able to recognize examples of aggregates and diachronic works when encountered.

We also set up an in-class activity where small groups of students examine a special format resource together, to propose attribute elements that are associated with those special formats.

IFLA LRM modelling of aggregates

Figure 5.7 General Model for Aggregates



Riva, Pat, Patrick Le Boeuf, and Maja Žumer. "Figure 5.7 General Model for Aggregates." In *IFLA Library Reference Model: A Conceptual Model for Bibliographic Information*, 94. The Hague: IFLA, 2017.

Here is a sample of a slide that I included in the review of aggregates.

Matrix: extension plan + mode of issuance

Mode of issuance	Extension plan				
	Static plan	Integrating determinate plan	Integrating indeterminate plan	Successive determinate plan	Successive indeterminate plan
Single unit					
Multiple unit					

See Week 5 Group Notes

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We also run an exercise where students are encouraged to cite real bibliographic examples based on the different extension plans possible.

LRM & RDA content

Weekly Theme	Instructor's goals
(Week 10) MARC 21 Session 1: Overview	<ul style="list-style-type: none">• Show students how to look up MARC 21 documentation, including MARC 21 Format for Bibliographic Data and code lists• Show students how to find MARC 21 mappings in the RDA Toolkit and in the application profile that is customized for our course• Show students how to find ISBD Consolidated Edition (2011) punctuations• Pre-recorded lecture: Encoding RDA in MARC 21

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In Week 10, we introduce students to MARC 21. We show students how to look up MARC 21 documentation, especially the Format for Bibliographic Data and associated code lists.

We also show students how to locate the RDA-to-MARC 21 mappings for themselves using the RDA Toolkit.

In MARC, certain ISBD punctuations remain important for correct identification of resources, so we also reference the Consolidated 2011 Edition for its punctuations.

(Course application profile with MARC 21 mappings)

	A	F	G	H	I	J
	RDA Element	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)	
1	work manifested	Record value of: authorized access point for work	not applicable		Various ways depending on the resource, such as: 100/110/111 + 245 \$a, or 100/110/111 + 240 \$a, or 130, or 245 \$a, or 700/710/711 \$t + \$i work manifested, or 730 + \$i work manifested	
20	expression manifested	LCNAF if available / String Encoding Scheme handout	not applicable	Record only if the value for this element differs from the value for the Manifestation element "work manifested".	Various ways depending on the resource	
21						
22	<i>Describing Carriers</i>					
	media type	RDA VES: Media Type	not applicable	In MARC bib, record the source of VES in 337 \$2	337 \$a \$b	
23	carrier type	RDA VES: Carrier Type	not applicable	In MARC bib, record the source of VES in 338 \$2	338 \$a \$b	
24	extent of manifestation	RDA VES: Carrier Type or RDA VES: Carrier Extent Unit	not applicable	In MARC bib, record as part of this string encoding scheme: Extent of manifestation : illustrative content ; dimensions	300 \$a	
25						
26	colour content	not applicable	not applicable		300 \$b	

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This is a glimpse of the application profile that we enhanced with MARC mapping instructions in column I.

LRM & RDA content

Weekly Theme	Instructor's goals
(Week 11) MARC 21 Session 2: Encoding and Application	<ul style="list-style-type: none">• Demonstrate how to apply our course application profile, which includes instructors' recommendations for MARC 21 mappings• Provide class time for students to practice applying RDA data to MARC 21, using a blank document template

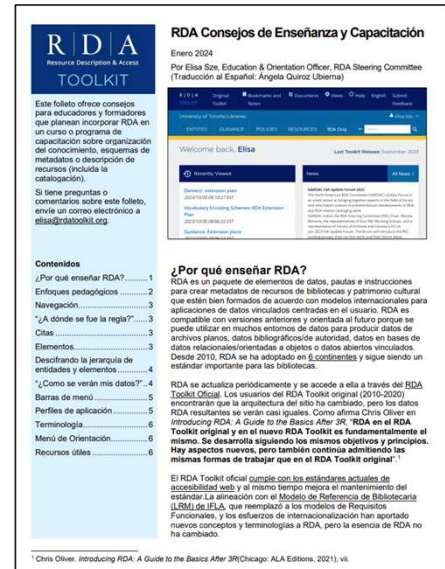
49

In this last week of MARC 21, we demonstrate how to apply our course application profile, including recommendations for MARC 21 mappings.

We provide class time for students to practice applying RDA data to MARC 21 using a blank document template.

Resources for educators

- [Resources for educators](#)
- [Teaching & training tips](#) in English
 - [Consejos de Enseñanza y Capacitación](#) in Spanish *Thank you to Ángela Quiroz Ubierna for the translation!*
- [Template RDA teaching slides](#) in English
 - [Outline](#)
 - *Thank you to the RDA Mexico Group for volunteering to begin the Spanish translation of the template slides.*



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That concludes my summary of the RDA Toolkit content used in my course.

[Resources for educators](#)

[Teaching & training tips](#) in English

[Consejos de Enseñanza y Capacitación](#) in Spanish -- *Thank you to Ángela Quiroz Ubierna for the translation!*

[Template RDA teaching slides](#) in English

[Outline](#)

Thank you to the RDA Mexico Group for volunteering to begin the Spanish translation of the template slides.

General RDA 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

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Other helpful resources that educators should explore are:

- Chris Oliver's excellent book, *Introducing RDA: A Guide to the Basics After 3R*
- RDA Toolkit Youtube channel
- RDA Steering Committee Presentations page
- RDA-L list hosted by ALA Connect
- Other RDA regional representatives
- And of course, I am always happy to chat with educators and trainers to share information on what has worked well when teaching.

Conclusion

- The RDA Steering Committee 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 or elisa.sze@utoronto.ca
- Thank you for your attention, and good luck with your planning!

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The RDA Steering Committee welcomes feedback on how to support educators and trainers.

If you have questions or comments about RDA education and orientation, please contact me at elisa@rdatoolkit.org or elisa.sze@utoronto.ca

Thank you for your attention, and good luck with your planning!

Muchas gracias por su tiempo.