

U.S. RDA Implementation Updates from the U.S. RDA Test Coordinating Committee

This represents the first of ongoing quarterly updates from the U.S. RDA Test Coordinating Committee on the progress and actions underway to meet the recommendations made in the Coordinating Committee's Final Report, issued in June 2011. The Coordinating Committee was designated by the senior management at the Library of Congress (LC), National Agricultural Library (NAL), and National Library of Medicine (NLM) to assume this monitoring role. The Coordinating Committee will monitor progress and activities related to RDA preparation and implementation during the interim period between the end of the U.S. Test and RDA implementation to occur not earlier than January 2013. In this document each major recommendation will be updated with the date of the update given at the end. The three U.S. national libraries will judge readiness for RDA implementation to mean completion of a recommendation or convincing evidence that the recommendation is sufficiently on track to implement RDA.

The updates use the recommendations section from the Coordinating Committee's Report so that the recommendations and the status can be viewed together.

Contingent on the satisfactory progress/completion of the tasks and action items below, the Coordinating Committee recommends that RDA should be implemented by LC, NAL, and NLM no sooner than January 2013. The three national libraries should commit resources to ensure progress is made on these activities that will require significant effort from many in and beyond the library community.

To achieve a viable and robust metadata infrastructure for the future, the Coordinating Committee believes that RDA should be part of the infrastructure. Before RDA is implemented, however, the activities below must be well underway. In order to allow sufficient lead time for these actions to occur, the Committee recommends that RDA implementation not proceed prior to January 2013. Timeframes for activities in these recommendations assume a start date of July 1, 2011 and represent the Coordinating Committee's best estimates. Many of the activities must occur simultaneously. The timeframes given are for each individual task. Therefore the timeframes given are not sequential.

- Rewrite the RDA instructions in clear, unambiguous, plain English.
 - Work with JSC to prioritize which chapters should be addressed and completed first. Prioritization should be based on comments gleaned during the U.S. RDA Test as identified by the U.S. RDA Test Coordinating Committee.
 - Identify and engage, in collaboration with JSC and the Committee of Principals, a writer to undertake rewrites.
 - Rewrite chapters identified as priorities.
 - Confirm readability of initial chapter rewrites.
 - *Timeframe for completion: within 18 months.*

Status: The Coordinating Committee agreed shortly after issuing its report that this recommendation is better stated as "reword" rather than "rewrite." It was not the Coordinating Committee's intention to change the meaning or intent of the RDA

instructions; the intent was to have RDA instructions written in clearer, less ambiguous language.

Accomplishments—

On track. ALA Publishing announced on November 11, 2011: “[A]cting on behalf of the Co-Publishers of RDA: Resource Description and Access and under the direction of the Committee of Principals, ... the selection of Chris Oliver as Copy Editor for improving the readability of RDA.” “This work is already underway. Ms. Oliver will first submit reworded chapter 9, followed by chapters 10, 11, 6, and 17. The work on these five chapters will be completed and put forward for approval by the Joint Steering Committee and review by the U.S. RDA Test Committee by June 2012. It is anticipated that the experience and knowledge gained from work on the initial chapter will inform the subsequent work and schedule.”

<http://www.rdatoolkit.org>

The Coordinating Committee expects to receive chapter 9 for review in February. For this first chapter, the Coordinating Committee will complete its review within three weeks. For subsequent chapters, the Coordinating Committee plans to complete its review within two weeks. The Coordinating Committee will include two former RDA test institutions to assist with its review of the chapters—one institution that continued to apply RDA at the end of the Test and one institution that ceased applying RDA at the end of the Test.

Date of update: January 2012.

- Define process for updating RDA in the online environment.
 - *Timeframe for completion: within three months.*

Status:

Completed. JSC will update content of RDA in the *RDA Toolkit* via two processes:

(1) constituency proposals for changes in intent of existing instructions and addition of new instructions;

(2) a “fast track” process for correction of typographical errors, addition or removal of examples, addition of terms to vocabularies, addition of references, clarification in wording, etc.

JSC and ALA Publishing decided that major changes to the RDA content would appear twice a year (in 2012, in April and October releases of the *Toolkit*). Changes from the fast track process could appear in any of the monthly releases of the *Toolkit*; the first changes from this process in 2012 will be in the April release. (Visit <http://www.rda-jsc.org/news.html> for ongoing information.)

Date of update: January 2012.

- Improve functionality of the *RDA Toolkit*.
 - Forward to ALA Publishing enhancements needed as gleaned during the U.S. RDA Test and work with ALA Publishing on a timeline for changes.

- Working with ALA Publishing, identify a process for ongoing usability testing of *RDA Toolkit* enhancements.
- *Timeframe for completion: within three months.*

Status:

Completed. Many of the improvements were already under way as the Coordinating Committee was completing its Report and recommendations. ALA Publishing has announced on the *RDA Toolkit* website improvements and future enhancements as well as mechanisms for involvement of and input from *Toolkit* users. (Visit <http://www.rdatoolkit.org/> for ongoing information)

Date of update: January 2012.

- Develop full RDA record examples in MARC and other encoding schemas.
 - Work with ALA Publishing to integrate examples into the *RDA Toolkit*.
 - Include examples for special communities (e.g., serials, rare books, music).
 - *Timeframe for completion: within six months.*

Status:

On track. Complete examples are under review by the Canadian Committee on Cataloguing and expected to be posted as a free resource (subscription not required) under the "Tools" tab of the *RDA Toolkit* with the next update to RDA. JSC, at its November meeting, charged a new Examples Group to prepare updated and additional examples in MARC and other encoding schemes to add to RDA instructions.

Date of update: January 2012.

- Announce completion of the Registered RDA Element Sets and Vocabularies. Ensure the registry is well described and in synchronization with RDA rules.
 - *Timeframe for completion: within six months.*

Status:

Completed. On August 1, 2011, it was announced: “The Joint Steering Committee for Development of RDA (JSC), the DCMI/RDA Task Group (<http://dublincore.org/dcmirdataskgroup/>), and ALA Publishing (on behalf of the co-publishers of RDA) are pleased to announce that the first group of RDA controlled vocabularies have been reviewed, approved, and their status in the Open Metadata Registry (OMR) changed to ‘published.’ This status change, from ‘new-proposed’ to ‘published’ signals that the final steps have begun in reviewing the work of the DCMI/RDA Task Group and ensuring that the RDA vocabularies (both elements and controlled vocabularies/concepts) are available in a stable form for the builders of applications.” “All the RDA vocabularies can be viewed in the OMR by using this page: <http://metadataaregistry.org/rdabrowse.htm>.”

Date of update: January 2012.

- Demonstrate credible progress towards a replacement for MARC.
 - Announce planning statement.
 - Identify the stakeholders, key players and experts needed.
 - Identify tasks and timeline for development.
 - Ensure development is underway.
 - *Timeframe for completion: within 18-24 months.*

Status:

On track. There has been much discussion in the past few years about replacing MARC. Replacing MARC was a major recommendation of the Working Group on the Future of Bibliographic Control that former Associate Librarian Deanna Marcum set up in 2006. Dr. Marcum determined in spring 2011 that LC should begin to address these recommendations to replace the MARC format. She established an internal group to begin the process. The group drafted a general statement that was issued prior to ALA Annual Conference in June 2011. Following ALA Annual, the group drafted and issued in October a general plan on the Bibliographic Framework Transition Initiative. A website was mounted where comments on the plan can be submitted to LC. LC is seeking grants to fund the work to move forward the initiative.

LC intends to use a broad cross-section of experts from affected communities to help with the development, e.g., from the Semantic Web, Web content developers, linked data, libraries, publishing. LC has developed a list of experts and stakeholders that should be consulted or engaged. LC will set up an advisory committee and a technical committee to assist LC with its work. Dr. Marcum has agreed to chair the advisory committee that will give high level guidance and input to the process. The technical committee will provide technical expertise to inform the effort. LC expects to set up the committees following ALA Midwinter Meeting in Dallas, where LC will present a briefing on the initiative on Sunday, 11-12 noon, in the Convention Center, Room D227. (Visit <http://www.loc.gov/marc/transition/> for more information.)

Date of update: January 2012.

- Ensure and facilitate community involvement.
 - Prioritize needed updates to practices, decisions, and documentation.
 - Prioritize and submit changes to JSC for RDA content.
 - Determine community involvement in the process, e.g., the role of Program for Cooperative Cataloging (PCC), OCLC, special interest communities, etc.
 - Determine best method(s) to share decisions with community.
 - *Timeframe for completion: within 12 months.*

Status:

On track. LC has been intensively engaged in planning for the eventual implementation of RDA. In that process, it has been working with various external communities to ensure that

all are aware of decisions and documentation that will need to be prepared or changed. JSC and ALA Publishing have set up mechanisms for receiving changes to RDA content, some of which can be fast tracked.

Some of the special interest communities are working to make needed changes and soliciting community agreement on outstanding issues. Each community is determining the best method for engaging its community members.

LC offers outreach, assistance, and feedback as warranted and as consulted. One special interest community, music, has established the RDA Music Revisions Facilitation Task Force. The TF is charged to compile known music issues related to RDA identified by the North American JSC constituencies (ALA/MLA, CCC/CAML, and LC). Ongoing work is to continue identifying new issues and prioritizing them.

LC has updated the LC Policy Statements (LCPSs) that replaced the LC Rule Interpretations. As they are updated, a summary of the releases of the LCPSs will be posted. The most recent revisions were included in the January *RDA Toolkit* release. (For more information, visit http://www.loc.gov/aba/rda/lcps_access.html)

One of the Coordinating Committee co-chairs gives updates on the Committee's monitoring efforts at the ALCTS RDA Update session at each ALA Midwinter Meeting and Annual Conference.

Date of update: January 2012.

- Lead and coordinate RDA training.
 - Prioritize training focus and schedule led by LC.
 - Engage PCC, Association for Library Collections and Technical Services (ALCTS), and other bodies.
 - *Timeframe for completion: within 18 months.*

Status:

On track. LC has developed in house training materials, both for the former RDA test catalogers who resumed applying RDA in November 2011 and, in anticipation of the eventual RDA implementation, for the 400 plus LC staff who will need to be trained. LC is mounting all of its training materials for use by various communities. LC is keeping PCC in the loop concerning training matters and timelines. LC is deliberating on a Day One to help with planning its training timeline. In order to train the 400 plus additional staff, LC will need a six month lead time before its Day One. LC's Day One will be coordinated with the NAL and NLM, as well as with its Anglo national library colleagues. LC has developed a long range RDA training plan that will be shared broadly following ALA Midwinter in Dallas.

LC has mounted a new website devoted to sharing the latest news related to RDA implementation planning: Resource Description and Access (RDA)—Information and

Resources in Preparation for RDA. The site is located at: <http://www.loc.gov/aba/rda/>. There are links to training documents, presentations, exercises, and examples of records as well as to other RDA related sites. Many more links will be added as items are created, edited, and updated as preparations for RDA proceed. The page originally created for LC documentation related to the US RDA Test will no longer be maintained. Links from that site will be migrated to the new site over time as appropriate.

LC serves as the PCC Secretariat. The PCC Secretariat is preparing training on RDA authorities for NACO libraries that will be rolled out in March 2012. The PCC Standing Committee on Training will assist the training effort through its role in developing a review mechanism for NACO libraries once their RDA authority training is completed. It is being planned for as many current NACO members as possible to take this training before the PCC Day One for RDA Authorities (date still being determined), helping to ease the transition to RDA. (Visit <http://www.loc.gov/catdir/pcc/> for more information.)

One of the Coordinating Committee members serves on the ALCTS RDA Planning and Training Task Force, helping the Coordinating Committee to stay tuned in to ALCTS RDA activities.

Date of update: January 2012.

- Solicit demonstrations of prototype input and discovery systems that use the RDA element set (including relationships).
 - Identify groups/organizations/vendors that could provide models.
 - Determine availability of funding to support prototype efforts.
 - Engage and produce initial prototypes.
 - Utilize demonstrations in education and training efforts about the library community's new metadata infrastructure.
 - *Timeframe for completion: within 18 months.*

Status:

On track. The Coordinating Committee will be reaching out to various entities to solicit information regarding what is being developed by vendors and other relevant groups. The Committee is currently working with Deborah and Richard Fritz, MARC Database Consultants with The MARC of Quality (TMQ), to review the work that they have done to create a template that demonstrates how RDA elements can be used. The application can serve as a prototype of input software using the RDA element sets and relationships; as an element list and schema development tool that might help to show what is needed in an official machine-actionable element list and Schema; as a MARC mapping visualization tool that might help to spur development of machine-actionable crosswalks; and as a training tool.

Date of update: January 2012.