

*A long and winding road:
RDA from principles to
practice*

Alan Danskin (Chair JSC)

Overview

- Background and introduction
- Objectives and principles
- Testing and Evaluation
- Implementation
- Future development

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INTRODUCTION

0.0 Purpose and Scope

RDA provides a set of guidelines and instructions on formulating data to support resource discovery. The data created using RDA to describe a resource are designed to assist users performing the following tasks:¹

¹ Based on the user tasks defined in IFLA Study Group on the Functional Requirements for Bibliographic Records, *Functional Requirements for Bibliographic Records: Final Report* (München: K.G. Saur, 1998), 82. Available online at: <http://archive.ifla.org/VII/s13/frbr/frbr.pdf>.

find—i.e., to find resources that correspond to the user's stated search criteria

identify—i.e., to confirm that the resource described corresponds to the resource sought, or to distinguish between two or more resources with similar characteristics

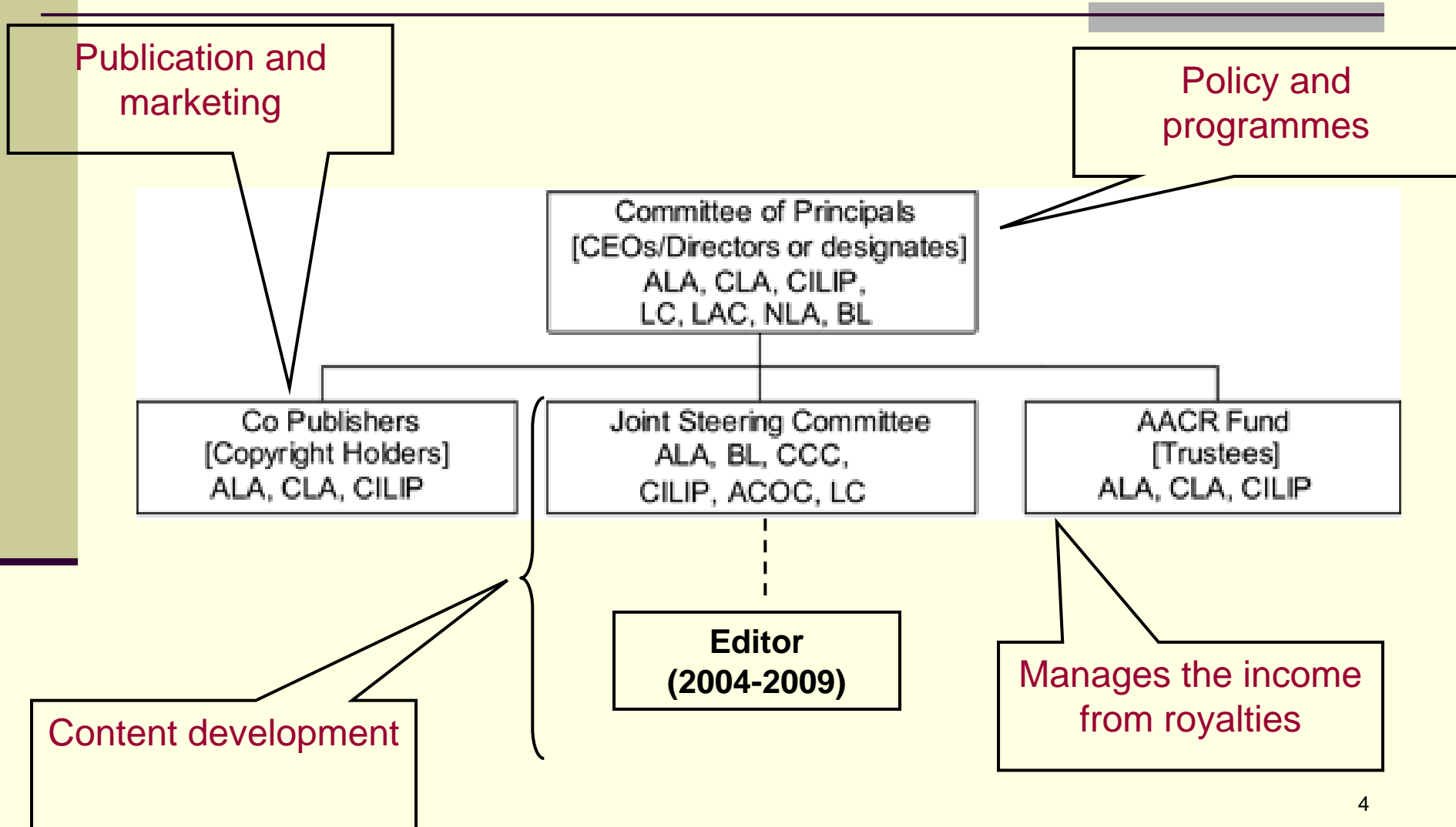
select—i.e., to select a resource that is appropriate to the user's needs

obtain—i.e., to acquire or access the resource described.

The data created using RDA to describe an entity associated with a resource (a person, family, corporate body, concept, etc.) are designed to assist users performing the following tasks:²

² Based on the user tasks defined in IFLA Working Group on Functional Requirements and Numbering of

Governance structure and business model



The Joint Steering Committee and RDA team JSC Meeting, March 2009, Chicago



L-R

Marjorie Bloss (Project Manager); Margaret Stewart (CCC); Alan Danskin (BL); John Attig (ALA); Barbara Tillett (LC); Deirdre Kiorgaard (ACOC); Hugh Taylor (CILIP); Nathalie Schultz (JSC Secretary); Tom Delsey (RDA Editor)

International Conference on the Principles and Future Development of AACR, Toronto, 1997

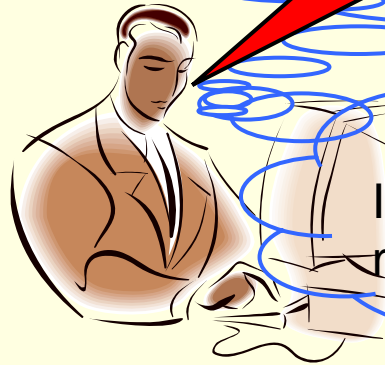
- Principles
- Content / Carrier
- Logical Structure of AACR2
 - Class of materials “
- Seriality
- Internationalisation

Case Law

- Inconsistencies introduced

Over specialisation

- Very detailed rules for classes of specialist material; exceptions from general rules



A map, that's chapter 3.

HELP!!!

It's electronic,
so that's chapter 9.

#* @&!

It updates monthly, so
maybe chapter 12?

Background and introduction



- AACR2
 - 1978
 - 1988
 - 1998
 - 2002
 - 2004 (AACR 3)

2010

R | D | A

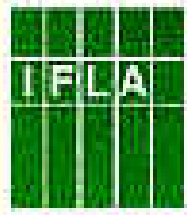
RESOURCE DESCRIPTION & ACCESS

RDA objectives and principles

- Objectives and principles for the design of RDA
 - Guided the development of content for first release
 - Conflicting principles need to be balanced

- Functionality of records produced using RDA
 - Descriptive data
 - Access point control data
 - Statement of International Cataloguing Principles

<http://www.rda-jsc.org/docs/5rda-objectivesrev3.pdf>



General Principles (ICP)

RDA

Convenience of user
Representation
Common usage
Accuracy
Sufficiency and
necessity
Significance
Economy

Consistency and Standardisation
Integration
Defensible, not arbitrary
If contradict, take a defensible,
practical solution.

Comprehensiveness: covers all types of resources and content

Currency: responsive to new developments and new types of resources and content

■ Resources

- Organisation by entities and attributes
 - Describe resources in their own terms, not in relation to existing types.
- Extensible vocabularies for media types and carrier types
- Supplementary instructions for music, legal, official publications, etc.

Content

- Chapter 7 Describing Content
- Extensible vocabulary for content type
- FRBR Group 3 entities (concept, object, event) represented by placeholders for first release

- RDA

Table of Contents

+ 0: Introduction

- Recording Attributes of ...

- Section 1: Manifestations & Item

+ 1: General Guidelines on Recording Attributes of Manifestations and Items

+ 2: Identifying Manifestations and Items

+ 3: Describing Carriers

- 4: Providing Acquisition and Access Information

4.0 Purpose and Scope

+ 4.1 General Guidelines on Acquisition and Access

+ 4.2 Terms of Availability

+ 4.3 Contact Information

+ 4.4 Restrictions on Access

+ 4.5 Restrictions on Use

+ 4.6 Uniform Resource Locator

- Section 2: Work & Expression

+ 5: General Guidelines on Recording Attributes of Works and Expressions

+ 6: Identifying Works and Expressions

+ 7: Describing Content

+ Section 3: Person, Family, & Corporate Body

- Section 4: Concept, Object, Event &

4.0 Purpose and Scope

This chapter provides general guidelines and instructions on recording the attributes of manifestations and items that are most often used to support acquisition and access.

The elements covered include those used to obtain or access a resource—terms of availability, contact information, restrictions on access, etc.

4.1 General Guidelines on Acquisition and Access

4.1.1 Sources of Information

Take acquisition and access information from any source.

4.2 Terms of Availability

4.2.1 Basic Instructions on Recording Terms of Availability

4.2.1.1 Scope

Terms of availability ▼ are the conditions under which the publisher, distributor, etc., will normally supply a resource or the price of a resource.

4.2.1.2 Sources of information

Take information on terms of availability from any source.

4.2.1.3 Recording Terms of Availability

Record the terms on which the resource is available. These terms consist of the price (recorded in numerals with standard symbols) if the resource is for sale, or a brief statement of other terms if the resource is not for sale.

Rationality: rational, non-arbitrary decisions

Core elements:

- Subset of RDA Element Set
- Minimum necessary to support user tasks
 - FRBR / FRAD weightings

- Some elements are core only when defined conditions apply:
 - Type of resource
 - Restriction of scope

- A “floor not a ceiling”
- Agency policy

Cost efficiency: the data should support user tasks in a cost-efficient manner

Purpose of elements recorded is clear

- Elements are recorded if justified by user tasks, e.g.

“Make a note ...if it is considered important for identification or access”

Automated data capture

- data automatically derived from a digital source can be transcribed as it appears on the source without modification

Alternatives, options, and exceptions,

- Guidelines and Instructions are clearly labelled
- Agencies can establish / share profiles

Flexibility: data should function independently of the format, medium, or system used to store or communicate the data. They should be amenable to use in a variety of environments.

- Instructions and guidelines = main text
- Display = Appendices D & E
- RDA has been designed for use with a variety of encoding schemes:
 - ISBD
 - MARC 21 / MODS & MADS
 - Dublin Core
 - Registration of RDA elements and vocabularies in RDF

Continuity: The data should be amenable to integration into existing databases (particularly those developed using *AACR* and related standards).

Implementation scenarios :

1. Relational / Object oriented database structure
2. Linked bibliographic & authority records
3. Flat file database structure (no links)

RDA elements = attributes
Constructing access points
to represent entities

- Scenario 1
- Name = Luckombe, Philip
- Date of death = 1803

- Scenario 2 or 3
- Luckombe, Philip, d. 1803

Transition to RDA

Transition from AACR2 to RDA

- AACR2 in use since 1981
 - Complex business model
 - Shared authority data
 - Collaborative cataloguing
 - Exchange of data

Testing and evaluation phase will precede implementation

Publication June 2010

National Library testing and evaluation
2010-2011

Earliest implementation – first half 2011

United States

- National Testing programme
 - Library of Congress
 - National Agriculture Library
 - National Library of Medicine

 - Testing – familiarisation / training (90 days)
 - Testing – Record creation / exchange (90 days)
 - Evaluation – analysis of test results (90 days)
 - Report

<http://www.loc.gov/bibliographic-future/rda/>

United Kingdom

- National (CILIP / BL)

- Executive Briefings
- Assessment
- Orientation – FRBR; terminology, changes
- Toolkit
- Training the trainer

- British Library evaluation

- RDA Implementation Environment
- Policy evaluation
- Training the trainer
- Workflow testing

Australian & Canada

- Australia
- <http://www.nla.gov.au/lis/stndrds/grps/acoc/rda.html>
- Canada
- <http://www.collectionscanada.gc.ca/cataloguing-standards/040006-1107-e.html#m>

RDA: How much will it cost?

RDA Element set and vocabularies will be freely available, open source data

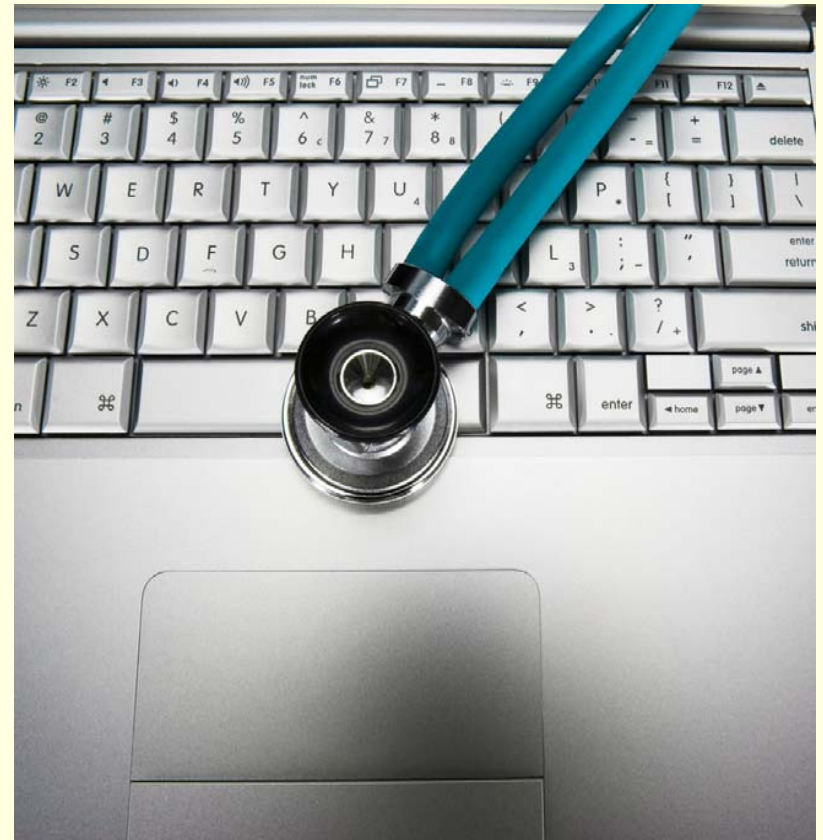
RDA Toolkit is available by annual subscription.

- Free access June to August 31st 2010
- US Prices (only) \$325 for first license
 - 2-9 concurrent users: \$55 per additional user
 - 10-19 concurrent users: \$50 per additional user
 - 20+ concurrent users: \$45 per additional user
- More information to follow: rdatoolkit@ala.org for updates on pricing



RDA and local system configuration

- Changes to configuration
- Changes to indexing
- Changes to value lists
- Changes to templates
- Changes to validation
- Changes to Macros
- Changes to import/export profiles



RDA: Record Exchange

- RDA records compatible with AACR2 records
 - RDA records will indicate (LDR/17) ISBD or non-ISBD
 - RDA flag in 040 \$e
- MARC 21 changes:
 - Update 10 & Update 11
 - Predominantly affect authority format

Introduction of explicit elements is good metadata practice

RDA Online and Local System

- Designed to allow integration with library systems
- Co-publishers negotiating links to RDA from third party tools
- Default: RDA run in background and toggle
- Announcements will be made case-by-case



RDA: Future Development

- Development is funded by royalties on sales of RDA
- RDA content and functionality will be developed

Priorities

FRBR Group 3 entities, attributes and relationships

- Issues deferred until after first release
 - <http://www.rda-jsc.org/working2.html#sec-6>
 - Constituencies are prioritising issues for discussion

Links

Joint Steering Committee for Development of RDA

<http://www.rda-jsc.org/>

RDA Online – Information about publication

<http://www.rdaonline.org/index.html>

Registry

<http://metadataregistry.org/schema/list.html>

<http://metadataregistry.org/vocabulary/list.html>