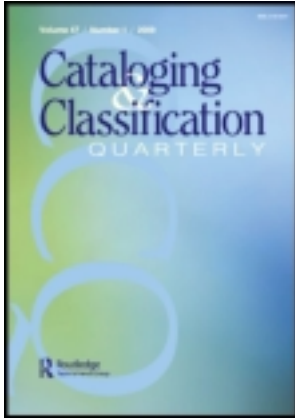


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### Introduction

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## Introduction

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The preparation and adoption of a cataloging code is a major accomplishment for the community of catalogers, metadata specialists, and technical services librarians. Professional librarians and their paraprofessional colleagues working in all types and sizes of libraries, serving diverse clienteles, and building print, online, and electronic collections, complimented by digital assets, worked individually and collaboratively through professional associations to draft the *Resource Description and Access* (RDA) cataloging code.<sup>1</sup> After more than a decade of effort, on June 13, 2011, the three national libraries in the United States announced that they will adopt RDA (with certain conditions) no earlier than January 1, 2013.

The decision from the Library of Congress (LC), the National Agricultural Library (NAL), and the National Library of Medicine (NLM) followed the public release of the U.S. RDA Test Coordinating Committee's report with recommendations.<sup>2</sup> Based on a set of recommendations from the *LC Working Group on the Future of Bibliographic Control* in January 2008,<sup>3</sup> leaders of the community of catalogers slowed work on RDA and planned a test of its feasibility for adoption and benefits to users in the library and patron communities. The national test enabled the national libraries and 23 partner institutions to gain insights into benefits for libraries and their patrons that would be derived from the adoption of the new cataloging code. Test participants had an opportunity to determine staff training needs, review technical services and cataloging workflows for different formats and languages of materials, calculate the financial requirements and commitments required to fully adopt and implement RDA, and solicit opinions from their catalog users who included non-technical services staff.

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During the RDA test period, the twenty-six participating institutions (including the three national libraries) generated 10,570 bibliographic records, 12,800 authority records, and 8,000 survey responses. The representative group of participating sites included libraries, archives, museums, book vendors, systems developers, library schools, and consortia. Comments from catalogers and metadata specialists focus on the RDA documents, the code's usability, the potential workflow and financial impacts on local operations, the RDA-compliant bibliographic and authority records, requirements for modifications to integrated library system (ILS) software, and the challenges inherent in continuing to use an aging MARC (Machine Readable Cataloging) format. Despite negative comments and lingering hesitation on the parts of individual catalogers, metadata specialists, and paraprofessionals involved in technical services, the full implementation of RDA is moving forward. To delay the implementation would negatively impact the ability of libraries, information centers, archives, and museums to participate fully in the information industry of the twenty-first century.

Although numerous leaders of the cataloging and metadata community generally support the implementation decision, the RDA test revealed several problems, including (but not limited to) the benefits for library staff and users. However, the increasing demand for a robust metadata framework compels the library community to move ahead with the national implementation of RDA. The economic impact and financial requirements to adopt RDA locally remains a challenge as materials vendors and ILS providers scramble to meet the demands that the new cataloging code places on their business and support operations. Their eventual solutions to the technical requirements to realize the full benefits of RDA will empower libraries so that they can continue to share data with other organizations and institutions, transfer to an updated and compatible cataloging framework that better accounts for non-print resources, and provide accurate, rapid access to information using emerging database technologies, such as the Semantic Web, cloud computing, and the eXtensible Catalog (XC).

This thematic issue of *Cataloging & Classification Quarterly* focuses on the perspectives of eight RDA test participants. The importance of the RDA national test merits this snapshot of their impressions about the adoption and implementation of the new cataloging code, training materials that will need to be developed and shared, results of creating and enhancing bibliographic and authority records using the new rules, and the lessons learned during the process.

In the opening article, "Training for the U.S. RDA Test," Judith A. Kuhagen, Senior Cataloging Policy Specialist in the Policy and Standards Division at the Library of Congress, sets the stage for the RDA national test. She describes the activities related to the training that the national libraries hosted in anticipation of the 2010 national test. Kuhagen delineates each of the

preparatory phases and the materials that the Library of Congress team prepared for test participants and highlights seven lessons learned.

Coordinator of the library educators' funnel test group, Marjorie E. Bloss, describes the training seminar, record creation, encoding, and responses to questionnaires for 15 graduate students in the Graduate School of Library and Information Science at Dominican University in the second article, "Testing RDA at Dominican University's Graduate School of Library and Information Science: The Students' Perspectives," Bloss identifies the challenges inherent in moving from teaching cataloging according to the *Anglo-American Cataloguing Rules* to RDA in order to ensure that students are familiar with Functional Requirements for Bibliographic Records (FRBR) and Functional Requirements for Authority Data (FRAD) concepts, RDA terminology, the international cataloging principles, and the value and potential of linked data on the Web, according to the report. In addition to the seven lessons learned, Bloss includes students' negative and positive comments and concerns about the RDA test and the impact of its implementation on libraries. She concludes with perspectives regarding the challenges that library educators will face as they prepare their students for the workplace.

In order to understand the impact and ramifications of RDA on the continuing resources community, the Association for Library Collections and Technical Services asked members of the Continuing Resources Cataloging Committee (CRCC) to form an informal RDA Testing Task Force. Serials catalog librarian at Northwestern University, Jennifer B. Young, and Valerie Bross, continuing resources cataloger at UCLA, describe the work that 24 CRCC members performed in their article, "Results of the CRCC Informal RDA Testing Task Force." Over the course of the test period, participants contributed 63 bibliographic records and 43 authority records. Comments about the RDA Toolkit, RDA, and its implementation resulted in suggestions and requests for guidance to CONSER (Cooperative Online Serials) Program leadership.

Catalog librarian Sevim McCutcheon describes the unique, tri-pronged approach to the RDA national test at Kent State University in her article, "RDA Testing in Triplicate: Kent State University's Experiences with RDA Testing." In addition to the University Libraries, the Kent State School of Library and Information Science participated in the funnel project for library educators and their students. Kent State's serials cataloger joined the Continuing Resources Cataloging Committee Task Force resulting in the university libraries conducting an informal test, responding to questionnaires and focusing on the experiences of copy cataloger and reference librarians with RDA bibliographic records. The lessons learned and observations of the test process from these three constituencies converge in a robust snapshot of the potential impacts of RDA on large academic institutions.

Christopher Cronin, Director of Metadata Cataloging and Services at the University of Chicago Libraries, describes the RDA testing experience at the library and explains strategies used for full implementation of the new cataloging code immediately following the test period in his article, "From Testing to Implementation: Managing Full-Scale RDA Adoption at the University of Chicago." He describes the library's testing experience, addresses major issues related to managing its adoption, and predicts the potential impacts that the RDA could have for the future of metadata structures in the university library.

Libraries may experience growing pains as staff members climb the steep learning curve required to adopt, master, and implement RDA. Jackie Shieh, Resource Description Coordinator at George Washington University's Gelman Library, recounts challenges for trainers and staff who embarked on the RDA journey at her institution. She shares the experiences of the Content Management (technical services) staff as they prepared for and participated in the national RDA test, highlighting the positive benefits these individuals realized as their mastery of the cataloging code increased, resulting in personal achievement and professional growth.

Melanie Wacker, Myung-Ja Han, and Judith Dartt explore the potential of RDA with the non-MARC standards, Metadata Object Description Standard (MODS), Encoded Archival Description (EAD), and Dublin Core in their article, "Testing *Resource Description and Access* (RDA) with Non-MARC Metadata Standards." Conducted simultaneously at Columbia University, the University of Chicago, and the University of Illinois at Urbana-Champaign, the authors describe the set-ups and workflows at their respective institutions, the issues encountered, and the conclusions drawn. They suggest that further training and better guidelines are essential for the use of RDA with non-MARC metadata standards.

The importance of using the new cataloging code with languages and scripts other than English contributed to the RDA national test. Joan C. Biella of the Library of Congress and Heidi G. Lerner of Stanford University Libraries were the only two Hebraica catalogers participating in the test. In their article, "The RDA Test and Hebraica Cataloging: Applying RDA in One Cataloging Community," they examine their experiences and questions to determine whether RDA could be applied successfully to the community of catalogers in which they work. Their viewpoints provide insight into the concerns and lenses through which specialized resource description and cataloging staff perform their work. The five recommendations reflect a professional commitment to take an active role in evaluating and modifying existing RDA instructions and guidelines to ensure that the goal to make RDA an international tool is fully realized.

The authors of this issue share their experiences and views on how bibliographic control and other descriptive practices can effectively support the management of and access to print, online, and electronic library materials

in an evolving technology-rich information environment. They candidly present both lessons learned from test participation as well as reveal challenges ahead in RDA implementation. We invite the reader to review and reflect on these eight articles. Together we can examine current RDA rules, recommend changes for improvement, and share the ways in which all of us in the library community can move forward and achieve international bibliographic description.

## NOTES

1. *RDA: Resource Description and Access*, <http://www.rdatoolkit.org/> (accessed August 16, 2011).
2. *Report and Recommendations of the U.S. RDA Test Coordinating Committee*, May 9, 2011 (revised for public release June 20, 2011), <http://www.loc.gov/bibliographic-future/rda/rdatesting-finalreport-20june2011.pdf> (accessed August 16, 2011).
3. *LC Working Group on the Future of Bibliographic Control*, <http://www.loc.gov/bibliographic-future/> (accessed August 16, 2011).