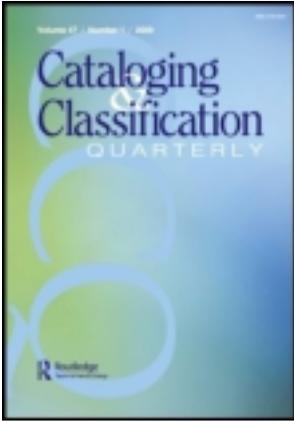


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RDA Testing in Triplicate: Kent State University's Experiences with RDA Testing

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Kent State University participated in three different Resource Description and Access (RDA) testing opportunities: one formal, one informal and format-specific, and one informal general test. This article presents the experiences of University Libraries and the School of Library and Information Science participants. Based on multiple experiences with RDA testing, we find that RDA records work at various levels: they are compatible with Anglo-American Cataloguing Rules, Second Edition (AACR2) records in both public and staff mode; original, copy catalogers, and reference personnel find them sufficient for the work they do; and there is little significant difference between AACR2 and RDA records in the MARC (Machine Readable Cataloging) environment.

KEYWORDS *descriptive cataloging, catalogers, interviews, surveys, Resource Description and Access (RDA), college and university libraries, books*

Resource Description and Access (RDA) is the cataloging standard designed to succeed the Anglo-American Cataloguing Rules, Second Edition (AACR2). Prior to a decision about RDA's adoption by the United States national libraries and under the auspices of the U.S. RDA Test Coordinating Committee, testing took place to determine the operational, technical, and economic feasibility of RDA. The best known test was the formal national test,¹ in which 23 test partner institutions were selected to join the national libraries in cataloging 25 core titles plus additional titles in both RDA and AACR2, and respond to surveys about cataloging each record. To

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differentiate them from the formal test, other tests are referred to as informal tests. The continuing resources cataloging community formed a task force for the informal testing of continuing resources and RDA. There was also an informal general test in the form of a survey for the broader community not selected for the formal test. This informal general test had sections designed for responses from catalogers, public services personnel, and end users of the catalog.

Kent State University (KSU) chose an unusual path in participating in RDA testing. While some institutions and individuals may have participated in one kind of RDA testing opportunity, KSU pursued a variety of opportunities. In addition to the formal test, two informal testing venues were available, one format-specific and the other more general. These experiences provided KSU personnel with a variety of vantage points as well as opportunities to educate themselves and others. The educational component motivated university personnel to participate in the RDA testing.

KSU's School of Library and Information Science (SLIS) volunteered for and was selected to participate in the formal test of RDA. University Libraries (UL) participated in two ways in the informal testing of RDA. KSU's serials catalog librarian joined the Continuing Resources Cataloging Committee (CRCC) Task Force to test continuing resources cataloging in RDA. UL also provided an institutional response to the informal general test questionnaire, focusing on the experiences of copy catalogers and reference librarians with RDA bibliographic records. Both copy catalogers and reference librarians responded to a brief survey. Although the number of respondents was small, findings indicate that RDA records work at various levels: they are compatible with AACR2 records in the staff mode of the catalog, they are compatible with AACR2 records in the public mode of the catalog, and the information contained in them is sufficient for the work of cataloging and reference staff.

Our purposes in participating were multiple. First, we recognized that our responses might be considered by the U.S. RDA Coordinating Committee. A second goal was to use the test as an orientation and educational tool internally and with colleagues. Third, the formal test provided an opportunity for collaboration between SLIS and UL; and the informal general test provided an opportunity for interactions between the UL technical services department and reference personnel. In summary, RDA testing was an opportunity to learn, to contribute to the national conversation on the future of RDA, to inform public services librarians about changes in cataloging that will affect them, and to gather input from public services on those proposed changes.

This article describes the experiences of UL and SLIS participants with both the formal test and two informal tests. The author begins with a brief overview of RDA's developmental history and a review of the published literature. A discussion of perceptions on RDA testing based on these multiple

experiences follows. KSU's level of involvement enabled us to view the testing process from three different perspectives.

NATIONAL CONTEXT: RDA DEVELOPMENTAL HISTORY

Although a full discussion of the developmental history of RDA is beyond the scope of this article, a listing of the milestones is valuable for placing the testing of RDA in context. Despite revisions to the 1978 AACR2, the text failed to fully accommodate the proliferation of new formats, publication practices, and data models. The Joint Steering Committee (JSC) for the Revision of AACR2 (later the Joint Steering Committee for Development of RDA) initially disseminated a draft part one of a third edition of AACR. While this document was meant to address AACR2's perceived flaws it received criticism for not going far enough.² In response, the JSC in 2005 commenced work on a new cataloging standard, RDA.³ In early 2008, the final report of the Library of Congress Working Group on the Future of Bibliographic Control recommended the suspension of the development of RDA until certain conditions were met.⁴ These conditions included satisfactorily articulating the use and business cases for moving to RDA, demonstrating the benefits of RDA, and carrying out testing of Functional Requirements for Bibliographic Records (FRBR) as it related to provisions of RDA.⁵ Development continued, albeit with these conditions in mind. A full draft of RDA was issued in November 2008, and the MARC (Machine Readable Cataloging) formats were adapted to accommodate the new fields and subfields necessitated by RDA. The JSC spent the majority of its March 2009 meeting considering constituency responses to the full draft of RDA.⁶ RDA was published as an online product called the *RDA Toolkit* in June 2010.⁷

Motivations for the testing of RDA and the broad outline of how the formal test was administered are best explained by the Library of Congress: "In response to concerns about RDA raised by the Library of Congress Working Group on the Future of Bibliographic Control, the three U.S. national libraries—the Library of Congress (LC), the National Library of Medicine (NLM) and the National Agricultural Library (NAL)—made a commitment to the further development and completion of RDA. The three libraries agreed to make a joint decision on whether or not to implement RDA, based on the results of a test of both RDA and the Web product. The goal of the test is to assure the operational, technical, and economic feasibility of RDA. Testers will include the three national libraries and the broader U.S. library community."⁸ The three United States national libraries announced their plans regarding the adoption of RDA in June 2011. Their decision was to implement RDA no sooner than January 2013.

LITERATURE REVIEW

Most of the literature to date regarding RDA is intended to prepare an audience of catalogers and technical services managers for a transition from AACR2 to RDA. Representative of the available articles include the following. Chapman's "The Case of AACR2 versus RDA" (2010) lays out the case against AACR2 and for RDA, concluding that as RDA influences MARC, there will be opportunities for system vendors to develop new features for on-line public catalogs.⁹ Klossner's "RDA for People Who Really Aren't Looking Forward to RDA" (2010) details changes in entries and description between AACR2 and RDA.¹⁰ Hart's "Getting Ready for RDA: What You Need to Know" (2010) provides a list of what changes and what stays the same between AACR2 and RDA, and includes a brief discussion of FRBR.¹¹ Hitchens and Symons's "Preparing Catalogers for RDA Training" (2009) discusses the theoretical framework of RDA, its structure, vocabulary, and options, and suggests training methods.¹² Very little has been written in library journals geared for public services librarians. The exceptions are a few articles in 2007 that lament the move toward RDA: Gorman's "RDA: Imminent Debacle"¹³ and Tennant's "Will RDA be DOA?"¹⁴ There appears to be no articles as yet addressing the educational needs of copy catalogers and public services personnel in regard to RDA.

Empirical studies addressing the responses of catalog users to RDA are starting to appear. The only research article found is Hider's "A Comparison between the RDA Taxonomies and End-User Categorizations of Content and Carrier,"¹⁵ in which he compares user-generated lists to RDA lists for content and carrier. Hider notes that when it comes to controlled vocabularies for these elements, "the end-users appear not to have been consulted."¹⁶ Hider found that the terms end users generated "barely coincide"¹⁷ with the terms prescribed by RDA. The literature about catalog users' reactions to RDA will increase with McCutcheon's forthcoming article, "RDA and the Reference Librarian: What to Expect from the New Cataloging Standard,"¹⁸ which explores the initial reactions of KSU reference personnel to monograph records created using RDA. Similar to Hider's study of end users, a main finding was that internal users of the catalog disliked the terms chosen to convey format information for books: content, media, and carrier vocabulary.

Resources are increasingly available in professional publications and in grey literature that staff in technical services departments find useful in learning the new standard. Locally designed training materials, RDA testing information, PowerPoint presentations, Web resources on RDA, and ordering information are currently available material. One example is Adam Schiff's PowerPoint presentation, "Changes from AACR2 to RDA: A Comparison of Examples"¹⁹ originally presented to the British Columbia Library Association in April 2010. All of these materials proved useful when preparing UL for

participation in the national testing of RDA and were placed on an Intranet page for easy reference.

In the following sections, a discussion is provided on the three different testing experiences of KSU: the formal test performed by SLIS, which included participation by UL personnel; the informal testing in the serials community, administered by the Continuing Resources Cataloging Committee Task Force and joined by UL's serials catalog librarian; and the informal general test, in which UL personnel examined and reported on the perceptions of two underrepresented groups: copy catalogers and reference personnel.

KENT STATE UNIVERSITY'S PARTICIPATION IN THE FORMAL GSLIS TEST

Formal test partners were selected from volunteer institutions by the U.S. RDA Coordinating Committee in a variety of contexts: representatives of archives, public, academic, school, government, and special libraries, along with consortia, book vendors/jobbers, and library school educators.²⁰ There were 23 test partner institutions, plus the three national United States Libraries. However, "it would be difficult to say precisely how many staff members or even how many libraries actually participated, since the OLAC/MLA [Online Audiovisual Catalogers/Music Library Association] and GSLIS [Graduate Schools of Library and Information Science] funnels [i.e., groups] included numerous institutions."²¹

Formal test institutions had a three-month practice period, from July through September 2010, followed by the actual test during which participants produced records between October 1, 2010 and December 31, 2010.²² During the test, participants created records for a core set of 25 titles in various formats, including RDA bibliographic records and counterparts in their currently adopted code (AACR2). Each site produced RDA records for an additional 25 items that were encountered during regular workflow. Testers filled out an online questionnaire about the production of each record on which they recorded information about the amount of time it required to create records, the ease or difficulty of understanding RDA instructions versus the currently adopted code, how much consultation was required to produce RDA records versus those in the currently adopted code, and what additional changes in workflow were necessary to use RDA.

Most institutions applied for a position on the testing team; however, the Kent State University's SLIS program responded to a call for volunteers on the discussion list EDUCAT and was accepted into the GSLIS group.²³ The coordinator of the test for KSU SLIS was cataloging instructor Dr. Athena Salaba. Salaba had originally planned to schedule a special RDA testing class, but was unable to do so when the testing schedule changed from summer to

fall. Adjustments were necessary in terms of number of local participants in the GSLIS group, the quantity of records to be completed, and overall scope of the project.

Because of limited advanced notice and the timing of the test, Dr. Salaba secured only three volunteers from her spring 2010 Cataloging I class for fall testing instead of a larger group of registered students for a special topics class. Since the small number of students participating in the test would be unable to complete the required number of records, Salaba invited four professional catalogers from the UL's Technical Services Department to join the formal test through SLIS. The opportunity to collaborate was welcome. The department head, a music and media specialist, a serials specialist, and a monographs specialist accepted the invitation. Salaba established a wiki on which to share information and from which to access the wiki designated for formal test participants, called base camp. Each cataloger selected which of the 25 core titles to catalog and communicated the choices on the wiki, so there would not be overlap. The workload became more manageable with Salaba's decision that the participants catalog titles just in RDA, not in AACR2 as well; to focus on the core set of titles instead of the additional set; and to create bibliographic records only, not authority records.

Salaba determined that the test and related surveys were designed for practitioners and from the managerial point of view rather than from an educator or researcher's point of view. The timing of the test itself was geared for librarians, who do not have constraints working across classes and semesters as do LIS educators. The main information solicited in the surveys was how much time it took to create a record in RDA—in other words, how economically resource-intensive would it be to switch standards. Salaba said, "This testing—to me, it's very questionable. . . . If it doesn't make a difference to the user, I don't care that it takes the same time or longer to create records."²⁴ To Salaba, the question should not be whether it takes longer for a cataloger to create records using RDA, but whether the cataloger creates more meaningful records.

The three students who participated in the formal test had been students in Salaba's Cataloging I class in the spring of 2010. Their exposure to RDA and the *RDA Toolkit* varied. Beth had the most training in RDA, as she had attended an all-day Music Library Association workshop, in which participants worked with the *RDA Toolkit* with laptops. A graduate student assistant in the KSU Cataloging Department, she had the opportunity to attend some one hour in-house presentations on RDA cataloging. Grace viewed the set of "RDA Train-the Trainer" Webcasts from the Library of Congress Web site and looked at the resources available on the RDA wiki that Salaba had created. Melissa did not mention her background exposure to RDA. Each student cataloged two titles using RDA and the *RDA Toolkit*, taking at least one hour and up to three to complete each record. Beth did serial records;

Grace and Melissa did monograph records. Each filled out the surveys related to the records; two students (Beth and Grace) commented that they did not understand all the questions on the survey.

Melissa found “using RDA to be intuitive and seemed to be helpful for adding additional descriptive data while cataloging.”²⁵ In contrast, Beth and Grace found the *RDA Toolkit* itself to be non-intuitive: “I found the arrangement of the information in the RDA Toolkit to be less intuitive than Cataloger’s Desktop,”²⁶ wrote Grace, but anticipated that it would get easier to use with familiarity. Despite her exposure to the *RDA Toolkit* during a music workshop, Beth said that during the test in which she cataloged serials, she felt “thrown to the wind” because there was no one there to show her how to use it, and because in RDA there was “more choice and leeway, which makes you question what you do.”²⁷

UL PARTICIPATION IN THE GSLIS FORMAL TEST

Comparing and contrasting the responses of student catalogers to those of professional catalogers participating in the same test is enlightening. The monographs, serials, and music and media cataloger of UL each had had moderate exposure to RDA. This exposure consisted of Webinars provided by the Library of Congress, two one-hour in-house presentations on books cataloging in RDA, and access to the KSU Intranet page devoted to RDA. Some catalogers had also had the opportunity to attend workshops on the topic.

In terms of RDA test strategy, the monographs cataloger started by examining records that others had created for the assigned title, hoping to gain insight and avoid pitfalls. Finding the *Toolkit* cumbersome to navigate, the next technique was to consult PowerPoint slides from workshops to discern rule numbers and basic content, then to use that information to navigate the *Toolkit*—almost as a last resort. It took an hour and a half to catalog the monograph title, more than if she had been cataloging in AACR2, because so much time was necessary to consult the rules and supporting documentation. The time to catalog records in RDA will likely decrease with more practice and increased familiarity with both the rule contents and the *Toolkit* functionality.

Serials catalog librarian Roman Panchyshyn cataloged one serial for the formal test, which took approximately one hour.²⁸ He found that it took longer than if he had cataloged the same title in AACR2, because of his lack of familiarity with the rules and difficulties with the functionality of the *Toolkit*. He elaborated about the *Toolkit*, “The interface was clumsy and difficult to use. Navigation was difficult unless you knew the exact page you wanted to visit. The clarity of the language in RDA left much to be desired.”²⁹

Music and media catalog librarian Peter Lisius found the process of original cataloging for the SLIS formal test to be especially time-consuming. It took about five hours each to catalog a blue-ray disc and a streaming video; and two hours for a sound recording. He chalked up the reason to “unfamiliarity with the structure of RDA guidelines and what records cataloged in RDA are supposed to look like.”³⁰ A contributing factor was that Peter did not discover Appendix D, with mappings from AACR2 to RDA, until after the test. Regarding using the *Toolkit* to catalog, Peter wrote, “It was a very cantankerous and labor-intensive experience. Navigation was counterintuitive and lacking in clarity. The content of the rules is generally good, but practical application guidelines in various metadata schemas (like MARC) need to be much improved.”³¹

WHAT WAS LEARNED FROM THE GSLIS FORMAL TESTING

In reviewing the records SLIS participants created for the formal test, Salaba noticed carry-overs from AACR2. In RDA, one still creates manifestations. Works and expressions are afterthoughts. All of the participants used International Standard for Bibliographic Description (ISBD) punctuation, although it is not required. “ISBD comes from where?” Salaba asked rhetorically, “from catalogers’ previous experience. It’s not clear where the old rules stop and the new rules start,” perhaps in part because we are still tied to MARC. Salaba is concerned that there is no clear vision of how RDA records are expected to look. Will they be AACR2 records with few abbreviations and the addition of 336, 337, and 338 fields? “The problem I have is that there is no clear separation between the two. This test did not clarify for me how they are independent [cataloging standards].”³²

Along those same lines, Grace wrote, “Using the new RDA rules was a little bit intimidating at first, but once I really started looking at the new rules, I realized that they are not that different than AACR2.” She realized from participating in the test how much she knew about AACR2, because “I kept comparing the old rules to the new RDA rules.”³³ Beth learned through both the process of using RDA and from looking at records others had done. She liked being able to go back and forth between AACR2 and RDA in the *Toolkit*.³⁴ Melissa wrote “I learned from this experience how catalogers will implement RDA into current MARC records and what that process may look like” and gained experience working with OCLC records. She wrote, “I learned that RDA implementation will take some getting used to, as well as training.”³⁵

The monographs cataloger found the experience of cataloging for the SLIS formal test to be both frustrating and enlightening. The *Toolkit* was cumbersome enough to navigate that she found alternative techniques for discerning rules, including looking at records others had done, in order to

minimize personal reliance on the *Toolkit*. It was enlightening to realize that the final record looked a great deal like an AACR2 record, with the exception of additional 336–338 fields and few abbreviations.

Considering his format, Roman reflected “Moving from format-based rules to FRBR concepts was not easy. Serials is still a format, and if we continue to use MARC as the encoding wrapper, serials will remain format-based. The best thing we could have used were guidelines established by CONSER.”³⁶ There was a five-page document entitled, “RDA as Modified by CSR: Recommended Guidelines,”³⁷ but Roman did not have access to it at the time. Roman concluded, “It was a beneficial experience, because I was forced to learn on my own.”³⁸ When asked what he learned from the experience, Peter the music and media catalog librarian replied, “The cataloging community has a long way to go for RDA to be useful in both a logical and efficient way.”³⁹

Two of the three students relied on their knowledge of AACR2 to guide them through the process of cataloging in RDA. One student and one professional cataloger looked for guidance in examples of records that others had created. Five of the six people who commented on the *Toolkit* found it cumbersome and non-intuitive to use. There were mixed opinions on the content of the rules themselves, with one participant finding the instructions generally good, another complaining about the clarity of language, and a student cataloger finding the leeway in the rules to be disconcerting.

KENT STATE UNIVERSITY’S PARTICIPATION IN THE CONTINUING RESOURCES CATALOGING COMMITTEE TEST

In addition to formal RDA testing, one of the professional UL catalogers who participated in the SLIS formal test also participated in a format-specific informal test, organized by the Continuing Resources Cataloging Committee (CRCC). The CRCC “was initially formed during AACR2 implementation to be a conduit for feedback on the rule changes. The U.S. RDA Test Coordinating Committee and the ALCTS Continuing Resources Section Exec[utive] Board” requested that CRCC reprise this role during the testing of RDA.⁴⁰ The committee charges included gathering comments and feedback from the American Library Association (ALA) continuing resources community, and compiling and submitting bibliographic and authority records created during the test. During the CRCC testing period of October 11, 2010 through December 21, 2010, 15 testers contributed 63 bibliographic and 43 authority records, which were analyzed by ten reviewers.⁴¹ The bibliographic records included original cataloging and copy cataloging. Tasks included serial and integrating resource maintenance.

Although no formal training was given, participants had access to training materials and documentation from the Library of Congress, RDA Webinars from ALA Publishing about both RDA and the *RDA Toolkit*, and were invited to participate in a Cooperative Online Serials (CONSER) RDA testing orientation Webinar. Additionally, “the CRCC organized one logistics orientation and two informal ‘office hours’ sessions for participants.”⁴² These were hosted by Webinar.⁴³

UL PARTICIPATION IN THE CRCC TEST

Roman Panchyshyn, serials catalog librarian at Kent State University Libraries, participated in the CRCC test. He described the process as “low key,” and “laid back.” Instead of working on the LC test set, participants were free to catalog whatever serials they encountered; and Roman created two original serial records. The first took one and a half hours; the second took a little less. Both took longer to catalog in RDA than they would have in AACR2. Roman observed, “The time it takes to catalog serials in RDA will go down with time because fundamentally there is not much difference between AACR2 and RDA, especially as long as we’re coding in MARC.”⁴⁴ He submitted his records to reviewers, who made sure he was aware of the differences between RDA and CONSER guidelines, the proper way to bracket information, and when to use dates.

WHAT WAS LEARNED THROUGH THE CRCC TEST AT KENT STATE UNIVERSITY

When interviewed, Roman noted a number of factors that might have affected his performance in the CRCC test: First, although CONSER guidelines were provided for the test, Roman did not have access to them, so he worked from the CONSER standard record. Second, he found it “extremely difficult to navigate in the *Toolkit*,”⁴⁵ because none of the Webinars he had seen addressed *Toolkit* navigation, and the RDA text lacked the intuitive, format-driven nature of AACR2. He did, however, find assistance in the form of shared workflows created in the *Toolkit*.

One of the things Roman learned was rule-specific: because a serial title needs to be consistent, information about a particular issue with a misspelling or error is conveyed in a note, even if it is in the first issue, rather than in the title field.

Roman thinks that LC should adopt RDA, then the Program for Cooperative Cataloging and other cooperative programs should set up workflows for various formats, because we still live in a format dominated world. “We’re looking toward CONSER to take the lead in developing standards for us to

use. As long as we're tied to MARC, there won't be much difference between RDA and AACR2, in descriptive cataloging at least. MARC is same old wrapper and many CONSER standards will still apply." He concluded, "Serials have trouble fitting into the FRBR model."⁴⁶ Serials with their multiple titles sequentially identifying a publication do not fit easily into the definition of "work" and may need a "super work" instead.^{47,48}

WHAT WAS LEARNED THROUGH THE CRCC TEST OVERALL

According to Young and Bross,⁴⁹ the co-chairs of the CRCC Informal RDA Testing Task Force, participants found the *Toolkit* difficult to navigate and problematic because search features often delivered too many results. Better integration of documentation was desired. As for creating bibliographic and authority records, respondents found it difficult to understand the content of cataloging instructions. Respondents had trouble selecting among the options within the cataloging instructions. The majority of respondents thought that the increased time it took to create records would decrease with practice and increased familiarity with the code, as would the negative impact on workflows and training. When asked if RDA should be implemented, the two highest categories of votes were "ambivalent" with six votes and "yes with changes" with five votes. The consensus was that RDA needs to be changed to meet the needs of the continuing resources community well. Additionally, it was in doubt as to whether integrated library systems (ILS) would be "able to display or use the new coding in a useful manner. . . ." Young and Bross concluded, "Until ILS vendors make their ILSs more dynamic, having more dynamic data seems of little use."⁵⁰

KENT STATE UNIVERSITY'S PARTICIPATION IN THE INFORMAL GENERAL TEST

The broader library community was invited to participate in the informal general test provided by the U.S. RDA Coordinating Committee between November 1, 2010 and January 6, 2011. The online questionnaire had a record creation section applicable to catalogers creating RDA records and a record usability section applicable to library staff (internal users of the catalog) and library patrons (external users of the catalog).⁵¹

RDA TESTING FROM KENT STATE UNIVERSITY'S PERSPECTIVE

Both the formal test and a section of the informal general test addressed original cataloging. Only one section of the informal general test was devoted to

catalog users' perceptions. No part of either test specifically addressed copy cataloging. Given these factors, UL personnel thought that the best way to contribute to this national endeavor was to bring to the fore the perceptions of some underrepresented groups: copy catalogers and catalog users. Because our secondary purpose was to use the RDA test as a training tool for staff and public service librarians, we focused efforts on copy catalogers and reference personnel.

PREPARATION FOR THE INFORMAL GENERAL TEST

Five RDA records for English language books, not part of the formal test set, were chosen from the OCLC WorldCat database. The same records were used with both copy catalogers and reference personnel. Collectively the records included common elements that differ between RDA and AACR2, such as non-standard capitalization, information about the author's affiliation transcribed from the title page, more than three authors listed fully, edition statements that were spelled out rather than abbreviated, and the fields for content, media, and carrier types. Because this institution would compile and submit one institutional response to the online Informal Test, copy catalogers and reference personnel were given photocopies of the test, modified slightly in wording to be germane to the group of persons reading it.

METHODOLOGY AND RESPONSES OF COPY CATALOGERS

Two copy catalogers were invited to participate in the informal general test. These copy catalogers had some exposure to RDA in the form of two one-hour in-house presentations, a Webinar, and several short explanations of key differences of RDA from AACR2 as agenda topics at regular meetings. Their experiences did not include using the *Toolkit*. They looked up the five records in the OCLC WorldCat database, examined them, and responded to questions in the record creation section of the modified Informal U.S. RDA Testers Questionnaire. They did not actually export the records into the local catalog.

When asked how much impact there would be on local operations (workflows, staff assignments, training, documentation, etc.) if the institution implemented RDA, one copy cataloger anticipated a minor positive impact and the other did not answer the question. (Other possible answers were major negative impact, minor negative impact, no impact, and major positive impact.) When asked, "Do you think the U.S. community should implement RDA?" both answered "yes," (rather than "yes with changes," "no," or "ambivalent"). One elaborated in later correspondence, "RDA provides users information that is clear regarding format. I like that abbreviations are not

used much. It [RDA] will prepare the way for FRBR.”⁵² Neither encountered difficulties in copy cataloging RDA records. They consulted others regarding RDA descriptive cataloging instructions with the same frequency that they consult others using the current rules, AACR2. They noted that on average, the RDA records took more time to copy catalog than records using the current rules. Neither copy cataloger provided comments on their answers in the survey itself, but later one elaborated that even the draft of internal documentation regarding copy cataloging was “helpful and provides clear guidelines about acceptable copy cataloging. The workflow is clear about when to route an RDA monograph record to catalogers.”⁵³

Another wrote about why the United States should implement RDA: “This reminds me of the switch from AACR1 to AACR2. . . . I can remember when I first started here at KSU in 1980 that was the “talk.” . . . The primary impact of RDA will be to clarify the cat. [cataloging] rules associated with a new group of library resources, including streaming videos and online document formats. It will be a new standard for resource description and access designed for the digital world. It must be compatible with internationally established principles, models and standards. I also think it’s an attempt to improve the way we describe and present relationships among resources and bibliographic entities. It’s something everyone will have to accept, learn and adapt to.”⁵⁴

WHAT WAS LEARNED FROM THE COPY CATALOGING INFORMAL TEST

Library personnel can deduce from the copy catalogers’ answers that they already work comfortably with RDA records, albeit more slowly than with the AACR2 records with which they are familiar. As more RDA records pass through their hands, it is likely that the time they need to evaluate them will diminish until it parallels the time they take with AACR2 records. Both copy catalogers believe that RDA should be implemented in the United States, and see ways in which RDA might be an improvement over AACR2.

Catalog librarians and the Head of Catalog and Metadata at UL have actively worked to revise copy cataloging documentation, starting with the documentation for monographs copy cataloging and one of the copy catalogers who participated in the survey conveyed a positive view of the documentation. We realize that more copy cataloging documentation needs to be revised in anticipation of a mix of AACR2 and RDA records for years to come.

METHODOLOGY AND RESPONSES OF REFERENCE PERSONNEL

The same five RDA records were imported from the OCLC WorldCat database to KentLINK, our local catalog, for viewing by reference personnel on

KentLINK's staging server. For the fields 336–338, only the text in subfield “a” was made visible; the coding in subfield “b” and the source in subfield “c” were suppressed. Thus the participants saw the following:

content type: text
media type: unmediated
carrier type: volume

Seven reference personnel completed surveys. Only one had previous cataloging experience, which had taken place in the 1970s. The reference librarians' only exposure to RDA was a short verbal explanation from this author that RDA was the new cataloging standard intended to supersede AACR2. They were asked to look up the five RDA records on the staging server and respond to the surveys based on their experience with the records. Selected questions from the survey and tables of responses are in the Appendix.

Especially interesting were the comments that the reference personnel provided. Positive comments included the following: “Description is good, as is edition information”; “Clearly labeling authorship is good”; “Words are spelled out, such as illustrations. Author info [affiliation, etc.] . . . is useful—reads like it would on the cover.” Another wrote, “Basic usability is not affected.”

Six of seven reference personnel commented on the addition of fields for content, media, and carrier, but were divided in their assessment of how these additions would affect patrons. Comments included the following: “For the most part the only difference noticed was the addition of content type, media type, carrier type. Since in these cases, these mean little to library patrons, I found no noticeable positive impacts.” “Labels and descriptions for content type: text; media type: unmediated; and carrier type: volume will not be meaningful to users. These should be changed to be MORE meaningful to users than AACR2, not less”; and “The three fields indicated above probably will not cause adverse affects.” “RDA labels do not offer a clear meaning, but since they add and do not subtract info found in AACR2 records, it seems like a modest change.”

Three commented specifically about the media type field: “Just the ‘unmediated’ bit is really throwing me”; “‘Unmediated’ is not clear in meaning”; and “‘Unmediated’ = this means nothing to the average user . . . I think it will confuse them.”

Two respondents noticed the potential for different formats to use different descriptors: “In the examples all . . . were the same. Other types of entries might make a difference” and “The only difference to me is that there are add'l [additional] fields which for the surrogate records I examined made no difference to identification—though the potential for usefulness might exist if the need to differentiate between a print or ebook arose.” One participant worried that having some titles capitalized and including both the inferred date of publication plus copyright date would have a negative impact on

exporting to citation managers. Comments elicited by the last question, “Would you find an RDA record to be sufficient to meet your needs for the work you do?” included the following: “Based on the records reviewed, it would be sufficient, but I don’t see the advantage when looking at this [i.e., these] monographic records.” The two who responded “meets fully” commented “Again, only that strange choice of wording to describe a book is insufficient in my mind,” and “Again, I notice no real difference.”

WHAT WAS LEARNED FROM THE REFERENCE PERSONNEL INFORMAL GENERAL TEST

While not enthusiastic about RDA records, Kent State University reference personnel determined that RDA records are comparable to AACR2 records, with most finding little difference. Most staffers believe that RDA records will meet their needs fully or mostly. They recognized with approval that RDA records can contain additional information from the title page and can contain fuller information in the form of spelled-out words instead of abbreviations.

The reference personnel were most concerned about the content, media, and carrier fields for books, seeing them as best benign and at worst, baffling. None saw them as advantageous or intuitive. Media type was considered especially problematic. Results might have been different had the respondents been exposed to bibliographic records for non-book formats. Ideally, library systems will be able to generate icons based on content, media, and carrier type in the public view of catalogs in the future. In the meantime, however, results from studies such as this can contribute to the discussion of what should and should not be displayed in the online public access catalog (OPAC). Although not yet decided at Kent State University, given that media type generated the most negative comments, plus given that it can be suppressed without significant loss of information, it is likely that media type will be omitted from future display of RDA records in the local catalog. Given how few studies of user responses to RDA records exist, further study is warranted.

CONCLUSION

RDA testing was an opportunity for catalog librarians to learn more about RDA by performing original cataloging in the new cataloging standard in a variety of formats, for copy catalogers to increase their exposure to RDA records, and for reference personnel to be introduced to RDA. In addition to a learning and teaching opportunity, testing provided a welcome juncture for UL catalogers to collaborate with SLIS in the formal test, and to interact

with reference personnel during the informal general test. Hopefully KSU's responses to the questionnaires from each of the three tests contributed to the national conversation on the future of RDA.

KSU UL tested RDA records in three different ways: through the formal test with SLIS, through the informal test organized by the serials community, and through the informal general test of KSU personnel, which focused on copy catalogers and reference librarians. This unusual path enables us to view the testing process from multiple perspectives. Participants in the formal SLIS test found that although it was time consuming to create records due to unfamiliarity with RDA and the *Toolkit*, RDA rules were similar to AACR2 rules, and the resulting records were similar. The UL participant in the CRCC test grappled with using RDA for continuing resources, and desired leadership and guidance from PCC. Copy cataloging participants and reference personnel in the informal general test had a generally positive opinion of the records they encountered.

The most significant finding was that RDA records work at various levels in the MARC environment: they live compatibly side by side with their AACR counterparts, both in the staff mode and the public mode of library systems. People familiar with AACR2 records recognized RDA records as similar and found that the information contained in them is sufficient for the work they do. Student catalogers, original catalogers, an LIS educator and reference personnel all commented that there was little difference between the AACR2 and RDA records they worked with. Original catalogers are able to create RDA records using the resources at their disposal. Though there will be a learning curve, the consensus among the student and professional catalogers is that the time needed to create records will decrease with practice and familiarity with both *Toolkit* functionality and the content of the rules.

Parallel to the case of understanding a foreign language compared to speaking it, so it is easier to recognize and process RDA records than it is to create them originally. The copy catalogers encountered no difficulties in copy cataloging monographic RDA records. Perhaps because of the ease of copy cataloging, they had an overall positive view of RDA records, of the effects that implementing RDA would have locally, and of the prospective implementation of RDA on the national level. An unanticipated finding was that both staff and student testers saw links between RDA and FRBR.

Reference personnel had mixed feelings. They recognized with approval that RDA records might contain more information as transcribed from the material itself, and that there was little substantive change between AACR2 records and the RDA records they viewed. They nonetheless were disconcerted by the wording in the fields that convey format information, content type (336), media type (337), and carrier type (338). In contrast, original catalogers expressed no qualms about conveying format but had reservations about the *Toolkit*, the content of the new standard, or both. Professional catalogers expressed negative comments about using the *Toolkit*, calling it

“difficult” to navigate and “cantankerous.” One of three student catalogers found the *Toolkit* intuitive, while two others did not.

The stated purpose of the testing was to gauge the operational, technological, and economic feasibility of implementing RDA. Given their decision to adopt RDA in 2013, it appears that the national libraries deem that RDA has met the criteria sufficiently to warrant a postponed implementation date. RDA has been tested a great deal; however, it has only been tested from a few points of view. It has been tested primarily by original catalogers in order to answer managers’ questions about how labor-intensive it would be to change standards. Only a portion of the informal general test, none of the formal test, and almost none of the published literature examines how changing cataloging standards will affect end users of the catalog, be they internal public services personnel or external patrons. Because RDA records are meant to be backward compatible with AACR2 records, perhaps users are meant to see little difference. The fact that KSU UL’s small group of reference personnel saw little difference in monograph records provides some evidence of this possibility. One would hope, however, that a new cataloging standard would result in records and databases that are more meaningful for users, rather than the same. KSU UL’s study was small, focused on internal users of the catalog, and only of RDA records for monographs. Such a study should be replicated on larger scales with non-book formats and with populations of public library and academic library external users. Further research is warranted.

NOTES

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APPENDIX

Did you notice anything about RDA records (omissions, inclusions, ways of expressing information, etc.) as compared to your usual records that would have a positive impact on a user's ability to find, identify, select, or obtain the item?

Responses	Number responding
Yes	3
No	3
No answer	1

Did you notice anything about RDA records (omissions, inclusions, ways of expressing information, etc.) as compared to your usual records that would have an adverse impact on a user's ability to find, identify, select, or obtain the item?

Responses	Number responding
Yes	3
No	3
No answer	1

Overall, which records do you believe are easier to understand?

Responses	Number responding
AARC2 (or current standard) records	1
RDA records	1
Both about the same	5
Don't know	0

Would you find an RDA record to be sufficient to meet your needs for the work you do?

RDA meets work needs	Number responding
Does not	0
Meets only some	1
Meets most	2
Meets fully	2
No answer	2