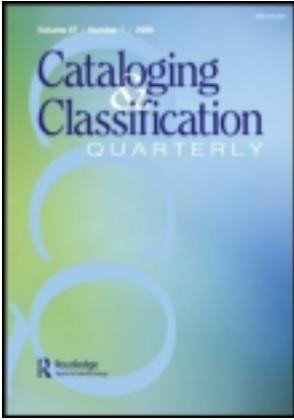


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### Participation in the U.S. RDA Test Program Helped Transform Work Habits at George Washington University Libraries

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## **Participation in the U.S. RDA Test Program Helped Transform Work Habits at George Washington University Libraries**

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*This article shares the growing pains that the George Washington University Libraries Resource Description Group staff experienced when they participated in the U.S. Resource Description and Access (RDA) Test Program. The steep learning curve that was required to apply RDA in order to meet the requirements of the test presented challenges for the trainers as well as the staff. Satisfaction finally came during a Webinar when they overcame and gained a greater confidence in their ability in adapting themselves to the sweeping changes in the world of metadata by being part of the history-making RDA Test program.*

*[Supplementary materials are available for this article. Go to the publisher's online edition of Cataloging & Classification Quarterly for the following free supplemental resources: RDA terminology quiz and RDA training exercise]*

**KEYWORDS** *resource description, cataloging, RDA testing, Resource Description and Access, repurposing staff, retraining, Anglo-American Cataloguing Rules*

### **BACKGROUND**

The Resource Description Group (RDG) at George Washington University Libraries, one of four units in the Content Management Department,<sup>1</sup> consists of two librarians and eight paraprofessionals who are responsible for describing and providing access to the University Libraries collections in

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print and non-print formats, including metadata for the digitized collections. Together with Global Resources Center (GRC) catalogers, RDG staff catalogs and processes library materials.

The number of RDG staff is relatively small compared to other libraries with a similar collection size.<sup>2</sup> Prior to 2006, techniques for cataloging and processing the library collection remained as traditional as those of its American Research Libraries (ARL) peer institutions. After a review of the technical services workflow by R2 Consulting,<sup>3</sup> the University Libraries reorganized the workflow and renamed the department Content Management. RDG staff in particular, through incremental and progressive changes, altered their cataloging and physical processing workflows. The implementation of R2's recommendations dramatically changed the attitude and perception of library staff toward Content Management (technical services).

The George Washington University Libraries belongs to the Washington Research Libraries Consortium. The Voyager bibliographic database is shared with seven other members in the Consortium. This shared database presented both challenges and opportunities for members who participated in national projects. Nonetheless, RDG successfully participated in the U.S. *Resource Description and Access* (RDA) Test Program, and came away with a sense of pride and confidence for their contribution to cataloging history.

## STAFF CORE SKILL ASSESSMENTS

In the past, the work of RDG staff was strictly compartmentalized. RDG staff were encouraged to work only within their given tasks and rarely challenged to think differently or try something outside their immediate responsibilities. In order to optimize staff resources and match the tasks to be done with the skills they possessed, a series of core skill assessments were conducted and analyzed. The staff participated in surveys, and in-house and outside-sponsored training and workshops. The curricula were designed to enhance staff's technical and computer skills as well as foster staff's interest and confidence in potential professional growth in knowledge and skill sets. Beginning in 2008, the staff was exposed to more cross-functional and technically challenging tasks. This required them to think differently and to develop individual problem solving skills and strategies for participating in the RDA Test the following year.

## THE CALL FOR PARTICIPATION

The call for participation in the U.S. RDA Test was issued in March 2009.<sup>4</sup> I saw this as an opportunity to partner the George Washington University (GWU) staff with a group of libraries that are often on the forefront

of library cataloging. Initially, the departmental management and Library Administration were not sure whether staff would have the time to learn a new cataloging standard on top of their already demanding routines. In the end, both the departmental management and Library Administration were persuaded that participation in a national collaborative program would be an excellent opportunity to engage GWU librarians to be more proactive, would elevate the library staff's professional horizon, and would broaden their perception of their own potential.

### FORMATION OF GWU TEST TEAM

Three seasoned GWU catalogers were designated to the U.S. RDA Test. When the Test start date was delayed, the GWU Test team had to be reconfigured due to the retirement of one cataloger.<sup>5</sup> The two remaining GWU catalogers simply would not be able to fulfill the Test requirements alone. In order to keep GWU Libraries' commitment to the national committee, the team was expanded to include a larger number of staff from two cataloging departments—including three librarians and six paraprofessionals. It was hoped that the implication of the larger scale would land the traditionally laid-back and quiescent cataloging staff on a more aggressive and forward-thinking path, and might also energize the rest of the library. The proposal to broaden the scale of involvement received wide support from Library Administration as they saw the benefits of a greater involvement of catalogers beyond RDG. The activities that ensued took all members of RDG on a journey that trained them to take a more active role in gaining the skills they needed individually to perform each task with excellence.

### TRAINEE NEEDS AND PROJECT NEEDS

When GWU signed on to be an RDA Test Partner in 2009, none of the three catalogers had a clear understanding of the expected outcome. The three leading national libraries—the Library of Congress, National Agricultural Library, and National Library of Medicine, were aggressive in developing and devising policy, guidelines, and training curricula. Prior to the launch of the Test, the differences of the core elements among the RDA Test, the Library of Congress, and RDA itself were continually updated and revised. The constant changes and interpretation of what the Test entailed or what the Library of Congress would do or not do created and heightened the level of difficulty in learning and applying the rules.<sup>6</sup>

The expansion of the GWU Test team introduced an added layer of complexity; there was an unevenness of cataloging knowledge and technology skills among the RDG metadata specialists and the GRC (Global Resources

Center) librarians. The need to update cataloging skill sets presented a major challenge when devising training programs. Having a project-focused training program was in itself a daunting task.

Upon returning from the Train-the-Trainer course in January 2010, the two seasoned catalogers began adapting the training materials to begin GWU's in-house training program. When other member libraries of the U.S. RDA Test shared their helpful training documents, references to these documents were highlighted for the use of staff. From February to September 2010, the three catalogers in the original RDA team designed eight formalized 90-minute training classes that included the following lectures and exercises:

### Structured Classes

- Train-the-Trainer Session (January 2010):<sup>7</sup> attended by two GWU catalogers
- Introduction to RDA (March 2010—throughout the remaining year of 2010 and as an agenda in RDG's monthly meeting)
- RDA in MARC (January 2010)
- RDA Changes from AACR (April 2010—throughout the remaining year of 2010)
- RDA Content/Media/Carrier Terms (May 2010)
- Quizzes on RDA concept and technology (August 2010) (See Appendix A, available in the publisher's online edition of *Cataloging & Classification Quarterly*)<sup>8</sup>

The above activities totalled 12 hours (720 minutes). In addition, there was a monthly fifteen-minute RDA update during RDG's regular monthly report from March to December 2010.<sup>9</sup>

### NEW CONCEPTS TAKING ROOT THROUGH PRACTICE

I firmly believe a key component of successful learning comes out of repetition and drill exercises, that is taking what was taught in classes through exercises and practice to real life scenarios. Therefore each class was followed by exercises. These exercises ensure that the newly obtained knowledge was applied and quickly built into each member's working vocabulary, thinking, and troubleshooting processes. This was also an attempt to close the gap in each team member's cataloging knowledge and skills as much as possible prior to the commencement of the Test in October 2010. The time spent on each segment was closely monitored. After the completion of individual exercises, team members were put into groups of two

or three to discuss and facilitate the learning and application of the RDA rules.

### Exercises and Group Discussions

- Exercises: Individual and Group (Appendix B: Exercise #1 example, available in the publisher's online edition of *Cataloging & Classification Quarterly*)
- Group Discussions: Two or Three in a group during the Test

As anticipated, the process and outcome of the participating staff members varied greatly from one to the other. The exercises required three hours and ten minutes (190 minutes) individually in addition to seven hours (420 minutes) of group discussions that followed. Some grasped the essence of the fundamental differences between AACR and RDA quicker than others.<sup>10</sup> Some had greater confusion about how the description of RDA fit into the MARC (Machine Readable Cataloging) structure and the reason why it did or did not. Most did not realize the difference between a transcribing and a recording activity. The in- and after-class exercises provided concrete grounding for the RDA principle of representation, "Take what you see" and "Accept what you get." All staff reacted negatively to the absence of abbreviation (e.g., p. for pages, co. for company, approx. for approximately). To them, the spelling out of words is an unnecessary test of their typing skill. The wall of resistance was immediately lowered upon an introduction of macros in their daily routines (in OCLC Connexion and through MacroExpress in the local cataloging interface). To apply a string of characters, all that was needed was to apply a single key stroke or combination of keys.

## SUPPLEMENTAL TRAINING AND WORKSHOPS

### Webinars

- National Information Standards Organization (NISO) (October 2009): *Alphabet Soup: AACR to RDA and Evolution of MARC*<sup>11</sup>
- ALA/TechSource (October-November 2010): *Using RDA: Moving into the Metadata Future*<sup>12</sup>

The supplemental Webinars and workshops resulted in an investment of an additional four hours and thirty minutes (270 minutes) for each GWU Test team member. At the time, the classes appeared to be a bit gruelling; nevertheless they provided unexpected and gratifying moments. During the

question and answer period, the team members found themselves able to answer the questions coming from the Chat line.

### Tools and Documentation

- RDA Toolkit
- RDG Monthly Meeting Progress Reports

The GWU Test Team unanimously found access to the *RDA Toolkit* to be a difficult process through both the Toolkit site and *Cataloger's Desktop*. Most found the navigation cumbersome and confusing. As a result, the team members consulted the PDF documents directly on the JSC (Joint Steering Committee for Development of RDA) site. Topic-based documentation was compiled based on extractions from member libraries participating in the national test. Regular monthly updates focusing on certain topics eased the anxiety of the imminent tasks and assignments.

These activities were intended to get the basic requirements in place before the actual testing began to ensure that all members of the GWU Test Team would meet the expected skill set requirements. Each member had to possess a basic understanding of computer terminology and to understand the order in which the skill set was to be mastered. It also required their undivided attention from October 1 until December 31, 2010.

### ACTUAL TEST

The GWU Test Team set up a special file folder on the network in Conexión where they could put their work and communicate with members of different departments throughout the process. Groups of two or three were established to discuss and review their assignments together. When a record was ready for submission, the status would be changed to ensure the process would proceed accordingly. GWU team members made use of the applications at their disposal to create records for individual and group file management. Each record logged the time-spent, was reviewed by the supervisor, and submitted as an Institutional Record using the specifically-designed OCLC authorization code for the U.S. RDA Testing program. The GWU team logged a total time of six hours and fifty-five minutes (3,655 minutes) for the following activities:

#### Common Sets

- Original Sets (25 records: one in RDA and one in local cataloging rules)
- Common Sets (5 records: one in RDA and one in local cataloging rules)

## Extra Sets

- Locally selected sets of 25 titles or more from regular workflow, either original or copy

## Surveys

- Each Record was accompanied by a survey
- Each Tester was required to enter a creator profile
- Test Record Use Questionnaire
- Test Partnership Questionnaire

## CONCLUSION

Like Olympic athletes who train relentlessly in the hope of winning an Olympic medal, the GWU Test team went through a long and gruelling process to prepare for the RDA test. Each member of the team learned differently and endured the sweat and tears of “growth.” At the end of the test, each one had learned which process best suited him or her and which part of the overall process they could apply to other areas of their work. Some caught on and retained the differences between RDA and AACR more quickly while others continued to struggle with the concepts and applications of the rules. Was it worth the 17 hours of structured training and over 94 hours of personal time? In their own words:

A good learning experience.

RDA documentation Chapters & App is very useful and other PPT [PowerPoint] RDA materials are also very helpful.

Overall the experience was a positive one and if RDA can provide the greater flexibility in manipulating metadata that it promises then it will be necessary to implement it.

When do we actually get to begin doing it for real?

The routine work that the staff does: providing resource description, subject analysis, control vocabularies, and data analysis is now carried out with greater expectation and enthusiasm. Participation in the U.S. RDA Test Program helped create an environment that moved the GWU metadata group from a passive and largely disengaging group of professionals<sup>13</sup> to one that is highly motivated and that enthusiastically embrace change as a constant in their work environment. This would not have become a reality had they not been part of the U.S. RDA Test Program.



## NOTES

1. Content Management Department of George Washington University Libraries is equivalent to the Technical Services Dept in other library environments. Resource Description Group is the cataloging unit.

2. The George Washington University Libraries has over 1.4 million titles, 151 full-time equivalent (FTE) of which 39 are librarians; on average each month 2,400 new titles are added to the collection (excluding shelf-ready books).

3. R2 Consulting is one of the premier consultants to academic libraries for workflow analysis and organizational redesign, <http://r2consulting.org/> (accessed April 5, 2011)

4. "Testing Resource Description and Access (RDA)," <http://www.loc.gov/bibliographic-future/rda/> (accessed April 5, 2011)

5. The cataloger retired in June 2010 after twenty-seven years of exemplary service to the library community.

6. It was particularly confusing to some staff that for the U.S. Test, the dimension of a carrier for disc was to be recorded in inches with the word abbreviated, "in.," even though the RDA guidelines stipulate the use of metric system (in cm centimetres).

7. "Library of Congress Documentation for the RDA (Resource Description and Access) Test: Training Materials for RDA Test Participants (January 2010)," <http://www.loc.gov/catdir/cpso/RDAtest/rdatraining.html> (accessed May 5, 2011).

8. The concept quiz was part of Library of Congress' *Train-the-Trainer* packet (Appendix A).

9. During the test period, October–December 2010, the cataloging output was approximately 900 titles as opposed to a usual average of 2,400 per month.

10. For instance, staff found the rule of whether a period should be applied in the presence or absence of a series statement tedious, and the concept of carrier, content, and media type hard to grasp.

11. "Bibliographic Control Alphabet Soup: AACR to RDA and Evolution of MARC," NISO, <http://www.niso.org/news/events/2009/bibcontrol09/> (accessed May 5, 2011).

12. "Using RDA: Moving into the Metadata Future (A Three-part ALA TechSource Workshop)," Chris Oliver, Karen Coyle, and Diane Hillmann, <http://www.alastore.ala.org/detail.aspx?ID=3125> (accessed May 10, 2011).

13. RDG's paraprofessionals have worked in cataloging for an average of ten years. Despite the fact that they do not possess a library degree, the use of "professional" is intentional to instill a sense of professionalism for both the librarians and paraprofessionals.