New Cataloging Code *RDA: Resource Description & Access* Expected to Replace *AACR2*

By Andrea M. Morrison

A new standard for cataloging has been published under the title: *RDA: Resource Description & Access* (RDA). A test by Library of Congress and other U.S. libraries was completed in Dec. 2010 and their report on RDA is expected to be published summer 2011. RDA is very likely to replace AACR2 as the cataloging code within a year. Even now, OCLC records created following the RDA standard are currently in IUCAT. This introduction will describe some of the basic changes in bibliographic description required by RDA. It will help you understand why the new code was needed and what the next steps are in adopting RDA. The future of cataloging is now!

The Development of RDA

RDA was developed in a collaborative process led by the Joint Steering Committee for Development of RDA (JSC; http://www.rda-jsc.org/) representing the American Library Association, the Australian Committee on Cataloguing, the British Library, the Canadian Committee on Cataloguing, CILIP: Chartered Institute of Library and Information Professions, and the Library of Congress. Over five years ago, the cataloging community recognized the need for a more robust standard that could be used by the library community, publishers, metadata users, and beyond. AACR2 was considered outdated as a tool to describe rapidly changing electronic resources and in the process of testing a new code, the library community decided to build a cataloging standard that was completely separate from AACR2. After years of development and feedback from the community of users, RDA was developed as an online tool and published in 2010 by the American Library Association as the RDA Toolkit (http://www.rdatoolkit.org). Later in 2010, upon demand, ALA published a print loose-leaf version of *RDA: Resource Description & Access* in a 4 ½ inch blue and white binder (ISBN: 9780838910931 ALA ed.).

The RDA process has certainly had its peaks and valleys, and publication of the standard has been delayed by at least several years! Reviewing the RDA FAQ at http://www.rda-jsc.org/rdafaq.html#1 helps clarify some of our main questions. It also includes an excellent description of the RDA test:

The testing of RDA comes in response to issues identified by the Library of Congress Working Group on the Future of Bibliographic Control. As a result of the Working Group's concerns, the three United States national libraries (the Library of Congress, National Library of Medicine, and the National Agricultural Library) agreed to make a joint decision whether or not to implement RDA based on the results of testing both RDA content and the Web product in which that content will be made available. The goal of the test is to assure the operational, technical, and economic feasibility of implementing RDA. Testers will include the three national libraries identified above and approximately 20 other participants from the broader U.S. library community. See http://www.loc.gov/bibliographic-future/rda/ for documents detailing testing information. (Accessed from RDA FAQ, http://www.rda-jsc.org/rdafaq.html#1, April 8, 2011)

Many other libraries including Indiana University libraries system wide have been informally testing and reviewing RDA. Much depends on the recommendations and analysis of the RDA test which will be announced in June 2011. It is unclear whether the U.S. national libraries will endorse RDA as it is or with minor changes. It is possible, although more unlikely, that they will reject it and ask for major changes. You will be hearing a lot more about RDA after mid-summer 2011!

Even after publication, RDA is still evolving. Yet another problem is that the formal and informal test libraries using RDA as a cataloging standard for bibliographic information have not applied the standards consistently in records produced in OCLC. Even in Library of Congress created records, the data deviates from published LC core elements of RDA. More cataloging training is needed to apply the standards correctly. This is true even of U.S. libraries that have already fully moved to RDA from AACR2. We know that RDA exists now in our library catalogs and it may likely be the new adopted U.S. cataloging standard for description of bibliographic resources. It is important for all librarians to learn more about it!

RDA Design

RDA is designed based on Functional Requirements for Bibliographic Records (FRBR), a conceptual model of the bibliographic universe. "What is FRBR" by Barbara Tillet, Library of Congress,www.loc.gov/cds/downloads/FRBR.PDF, (2003) is an excellent introduction to the model and the definition of terms used in RDA. RDA both in print and online has a glossary that will assist librarians and staff in navigating the cataloging 'jargon' needed to understand the principles. It may be difficult to understand the basics of RDA without reviewing FRBR and other RDA terms, such as 'entities' and 'attributes.' In RDA, 'entities' refer to the key objects of interest to users of bibliographic data. RDA organizes entities into three groups. Group 1 entities are **work, expression, manifestation,** and**item**; Group 2 entities are **persons** and **corporate bodies related to Group 1**; and Group 3 entities are **subjects related to Group 1**. Attributes is defined simply as characteristics, features, and identifiers of an entity belonging to any of the three groups.

RDA has its many doubters, but it is expected to be a more flexible framework for data capture, storage, retrieval, and display. It is compatible with both digital and legacy technologies. Its intention is to provide data that can be used cost effectively over many platforms, and its focus is on what users need. Take a look at the stated purpose and scope from the RDA Toolkit Introduction (0.0). These are based on the user tasks defined in the IFLA Study Group on the Functional Requirements for Bibliographic Records, Functional Requirements for Bibliographic Records: Final Report (1998), (http://archive.ifla.org/VII/s13/frbr/frbr.pdf) and the IFLA Working Group on Functional Requirements and Numbering of Authority Records (FRANAR), Functional Requirements for Authority Data: A Conceptual Model, edited by Glenn E. Patton (München: K.G. Saur, 2009).

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:

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:

find—i.e., to find information on that entity and on resources associated with the entity

identify—i.e., to confirm that the entity described corresponds to the entity sought, or to distinguish between two or more entities with similar names, etc.

clarify—i.e., to clarify the relationship between two or more such entities, or to clarify the relationship between the entity described and a name by which that entity is known

understand—i.e., to understand why a particular name or title, or form of name or title, has been chosen as the preferred name or title for the entity.

RDA provides a comprehensive set of guidelines and instructions covering all types of content and media. (RDA toolkit, 0.0 Purpose and Scope)

RDA was based on the clear intention to fully describe resources as well as describe a resource's relationships with other resources, persons, families, subjects, concepts, etc.

Some features of RDA are confusing. Section 1 'Recording Attributes of Manifestation and Item' will be used to describe most works we are familiar with in IUCAT, including serials and monographs that do not have relationships to other works. The preferred source of information that catalogers will rely on to describe resources is based on the cataloger's best judgment. There is no longer a concept of 'chief source of information' as we used in AACR2. Section 2 provides a guide to recording attributes of works and expressions. In simplified terms, **work** refers to a distinct artistic creation and **expression** refers to an artistic or creative adaptation or translation of a work. An RDA work record for Shakespeare's *Romeo and Juliet* will not exist as an actual physical publication; it will exist to link all versions and adaptation of the title together. An RDA record for an expression of *Romeo and Juliet*, such as a videorecording of a play or a translation will link back to the work record. Any publication of *Romeo and Juliet* that does not meet the criteria for expression will be described as a manifestation according to RDA and will also link back to the work record. RDA requires a definition of the relationship of these works to the original creative work. This is one of the strengths of RDA. Capturing the specific relationship of titles will be useful in library catalogs, library metadata, publisher's metadata, and beyond.

RDA requires a core set of elements to be transcribed to describe a resource. Beyond the core, much is left to the cataloger's discretion. We may find much more work ahead of us to establish local cataloging policy.

What Will You See In An RDA Record?

RDA records are currently in IUCAT right now. Perform a general keyword search on the string "rda"{040} and you will find records coded rda that are created by the RDA cataloging standard. (Be aware that some records are on order and not yet cataloged). These are some new characteristics of RDA bibliographic records:

- RDA requires the title and statement of responsibility information be transcribed as shown, including capitalizations and abbreviations. If the title is entirely in capital letters, it also allows an option of transcribing all caps for the title. However, initial articles such as 'the' or 'Eine' will generally not be transcribed.

- The AACR2 GMD or General Material Designation is only optional. This may mean that many cataloging institutions will not use it in their records. IUCAT relays on this information for various searches and this could present a problem for us. The title *Sense and sensibility* [videorecording] / by Jane Austen will be *Sense and sensibility* / by Jane Austen. The GMD is replaced in RDA by three notes: Content type, Media Type, and Carrier Type. For their test, the Library of Congress has posted good examples of the different treatment of GMD information in AACR2 v. RDA records, see REPLACEMENT OF GMD ELEMENTS; CARRIER DESCRIPTION, www.loc.gov/catdir/cpso/RDAtest/gmd.doc.

- All names and affiliations on the preferred source of information may be transcribed, i.e. Dr., Mrs., University of Indiana, Bloomington, IUPUI, etc.

- Dates are transcribed with publishing AND copyright dates, i.e. 2010, c2009.

- Physical description will rarely have abbreviations and will therefore be a longer field: p. will be pages; ill. illustrations. However cm. will remain cm. for centimeters.

- Notes will fully describe the content, the carrier and the mediation required to access the resource. How useful these will be remains to be seen. Try looking at the OPAC version for a simple print book:

  o Content type: rda content

  o Medium: rda media

  o Format: rda carrier

The Future of RDA

Although it is uncertain whether the U.S. libraries will recommend RDA implementation, and implementation of RDA at IU is based on that recommendation, some change is very possible. It would be an excellent goal for all library staff to learn more about RDA. Cataloging staff are learning about RDA by accessing the RDA toolkit and attending various webinars. The Library of Congress test site has posted RDA record examples at http://www.loc.gov/catdir/cpso/RDAtest/rdaexamples.html. Many free presentations are on the Web from trusted sources such as OCLC, ALA ACLTS, and LC. However, an IU Task Group has gathered the best information in one resource for you. The IO Cataloging Congress has charged two IU groups to facilitate the possible implementation of RDA in IUCAT. The Resource Description & Access Task Group was charged to recommend an implementation approach and timeline and has created a useful wiki of RDA information, seehttp://iurda.pbworks.com/w/page/32216824/FrontPage. More information will be forthcoming after the test results are announced. The brave new world of cataloging standards, RDA, may be frustrating to implement, difficult to learn, and annoying to use in the beginning. But there is every hope that it will deliver richer data capture, storage, retrieval, and display for library users; and isn't that what libraries are all about?