

# Catalogue and Index

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Information Professionals (CILIP)  
Cataloguing and Indexing Group

Editorial

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Welcome to the final issue of Catalogue and Index for 2013.

It is most fitting that this issue is devoted to the theme of RDA, as it has been the single biggest challenge most of us have faced this year! We begin with a summary of the CILIP CIG RDA survey conducted in November 2013, which gives a useful analysis of RDA implementation in the UK so far. We also have a wide range of articles on RDA reflecting the impact it has had on different types of practitioner, ranging from the student's perspective to that of a JSC representative. I wish to thank everyone who has taken the time to submit articles and thereby reflect such a good range of experiences of RDA thus far.

We also feature the new letters page; we hope this section will provide an opportunity for comment and debate.

Best wishes

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## Contents

2-60 Articles on RDA  
implementation

61 Alan Jeffreys Award  
announcement

62-63 Letters

64-67 Book reviews

The following survey provides a snap shot of the current state of RDA implementation and planning in the UK. The survey was conducted using Survey Monkey. The survey was announced through the CIG Blog, CIG monthly email bulletin, LIS UKBIBS and Twitter; 56 responses were received between 15<sup>th</sup> and 24<sup>th</sup> November, 2013. Nine responses were found to be spam and have been discounted; therefore the total number of valid responses is 47.

Responses are overwhelmingly from academic and research libraries. More than three quarters of the responses are from academic or national libraries; only 8.5% are from public libraries. Several categories received zero responses, which may be a reflection on how the survey was distributed.

The majority of respondents (39/47—83%) have decided to implement RDA. Sixteen of these (34%) have already implemented. A further 14 plan to do so in the next 18 months ; 9 others have decided to implement, but have not yet set a date. None of the respondents has decided not to implement RDA, but 7 have yet to make up their minds.

Some different interpretations on the meaning of implementation were evident from the comments. Some respondents considered import and reuse of RDA records to be implementation and others did not. This may reflect different levels of dependency on copy cataloguing.

The main reason for implementing RDA is interoperability with others (33/47 or 70%). Cost effectiveness was a significant consideration for only 3 respondents (6%). Much greater significance was attached to the range of material types covered by RDA (34%); the need to update the cataloguing code (25.5%) and the aspiration to implement FRBR (17%).

Respondents' expectations of benefits were assessed over the short term (24 months) and the longer term.

Those who have not yet implemented RDA are mainly waiting to see how others get on, but are also concerned about training, uncertain benefits and subscription costs. System limitations were also a factor.

In the short term respondents expected interoperability to be the main benefit of implementation. RDA is also expected to be more responsive to change than AACR2. In the short term, few respondents were optimistic of achieving enhanced productivity (4/47 or 8.5%) or making efficiency gains (5/47 or 6%).

There is little more optimism of productivity improvements in the longer term (6/47 or 12.8%), but there is more confidence of enhanced discovery (27/47, or 57%) and that RDA will improve the cataloguing of non-print resources (18/47, or 38%).

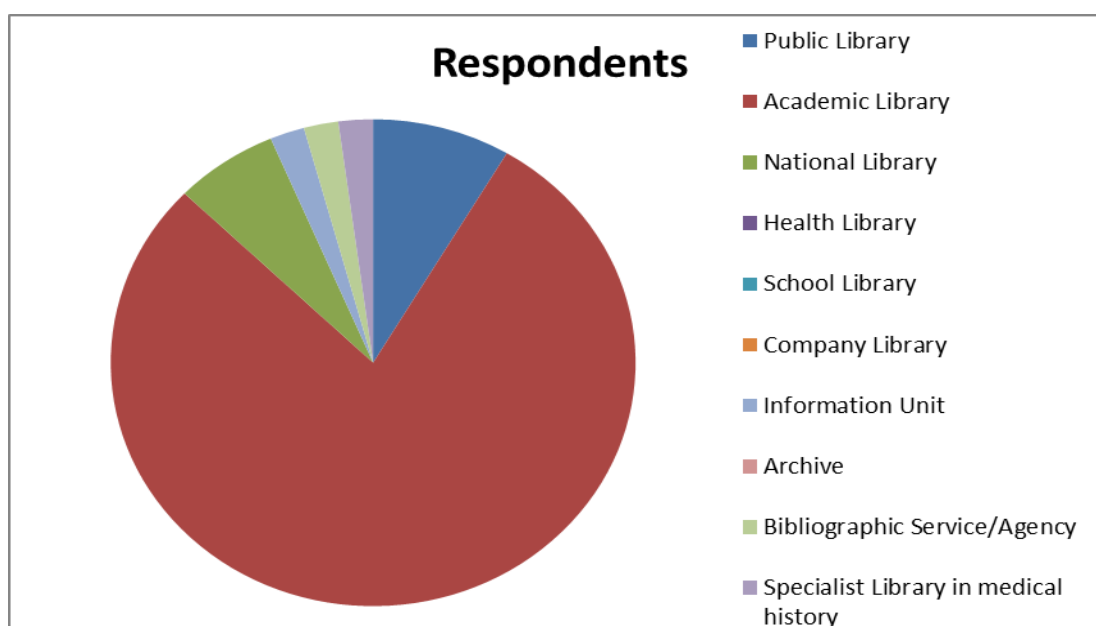
Respondents were asked to comment on their experience with productivity. A number said that it was too early to tell. Those who did comment generally felt that the impact of RDA on productivity was neutral or somewhat negative. The comments suggest that the perception also depended on other factors, such as the mix of original and copy cataloguing and the application of authority control. Some said it is hard to judge because RDA is just one among many changes affecting productivity. Respondents also noted the impact of interim/split work flows and commented on processing backlogs, which may be difficult to recover from. At least one agency is calibrating its application of RDA, through local policies, to balance resource allocation and manage throughput.

Respondents were asked about their system environment. Most of those implementing RDA (40/47, or 85%) are doing so in the context of a standard Library Management System. Very few (2/47, or 4%), are currently using a fully relational system, or expect to be doing so at implementation. A few (5/47 or 10%) are still using flat file structures in which all the information has to be held in the bibliographic description. Many commented that they are wholly dependent on their system supplier for any enhanced capabilities. These constraints inevitably colour perceptions of future benefits. It is also evident that respondents still have questions about the FRBR model.

Finally, respondents were asked to comment on the scope of their implementation of RDA. All are applying, or plan to apply RDA to printed books and serials. The full range of resources is considered to be in scope and a significant number (18/47, or 38%) are planning to use RDA for archival resources as well as publications.

### Survey results

#### 1. Which of the following best describes your organization?



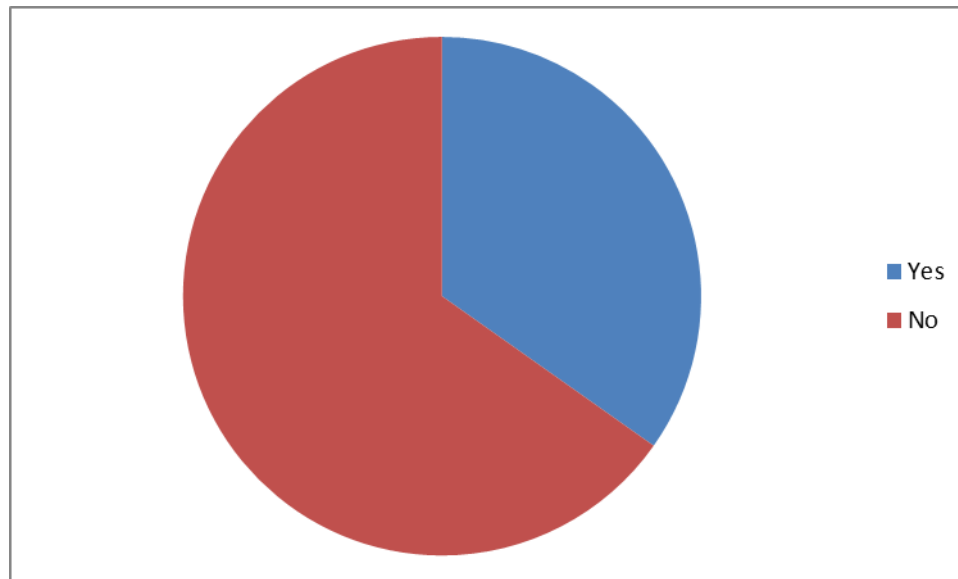
Type	Respondents	%
Public Library (PL)	4	8.5
Academic Library (AL) [1]	37	78.7
National Library (NL)	3	6.4
Health Library	0	0.0
School Library	0	0.0
Company Library	0	0.0
Information Unit	1	2.1
Archive	0	0.0
Bibliographic Service/Agency (BA) [2]	1	2.1
Specialist Library in medical history [3]	1	2.1

[1] Includes University Library from “other”

[2] Bibliographic Agency added from “other”

[3]From “other”

## 2. Has your organization already implemented RDA?



Yes	16	34%
No	30	63.8%

(AL) “We are however, uploading RDA bib records and editing them to 'fit' our catalogue”

(AL) “We have 'implemented' as we are accepting RDA imported records - but we are not yet doing original cataloguing using RDA.”

(AL) “Not formally, but we are importing RDA records from external sources”

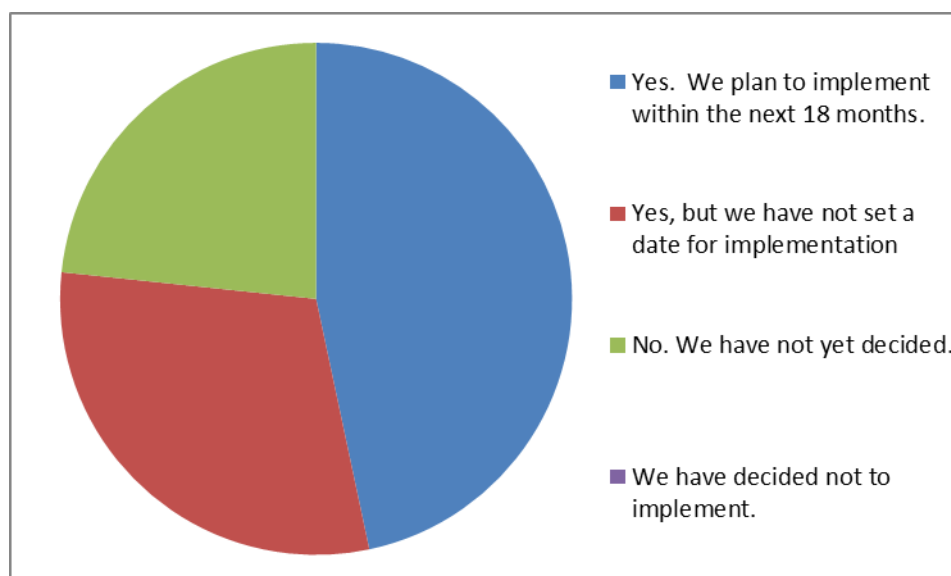
(AL) “.Not for in house cataloguing, but we are accepting RDA records and have made some systems changes in anticipation.”

(AL) “But we use imported RDA records”

(AL) “We are in a phased implementation, so have implemented RDA for copy cataloguing and vendor records, where available, and are training for scratch RDA cataloguing Jan-Mar 2014 in order to implement fully from 1st April 2014 for monographs. We will then deal with RDA for other resources from April to June 2014.”

(AL) “We largely use derived records. If an incoming record is RDA then we update it as such, if it is an AACR2 record then we edit it as is. Records created from scratch are at the choice of the individual cataloguer. We subscribe to the RDA Toolkit”

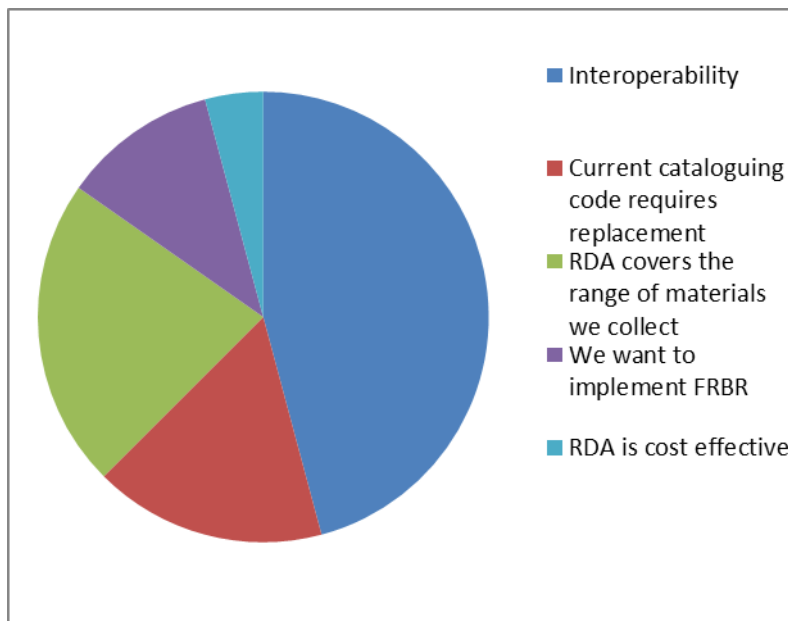
### 3. Has your organization taken a decision to implement RDA in the future?



	Respondents	%
Yes. We plan to implement within the next 18 months.	14	29.8
Yes, but we have not set a date for implementation	9	19.1
No. We have not yet decided.	7	14.9
We have decided not to implement.	0	0.0

(AL) “When all our incoming records are RDA then we'll have implemented the new code. It will probably be the case that at some point in this transition that all our locally created records will be RDA”

#### 4. What are your reasons for implementing RDA?



	Respondents	%
Interoperability	33	70.2
Current cataloguing code requires replacement	12	25.5
RDA covers the range of materials we collect	16	34.0
We want to implement FRBR	8	17.0
RDA is cost effective	3	6.4

(AL) “An honest response here is that change is effectively being forced on us by changes in the wider world of cataloguing. As a music specialist I'm not convinced that the implications of RDA/FRBR have been fully thought through for music, nor is it fully willing to concede that patterns of searching in an online environment are radically different from those in the days of card catalogues. Furthermore, although RDA is designed to be independent of any format, all well and good, but for those who would still be using MARC, the problems will

outweigh the benefits.”

(AL) “Future proofing, plus greater serves our needs (i.e.; rule of 3 being scrapped etc.)”

(AL) “As it seems inevitable we decided it was better to start sooner rather than later”

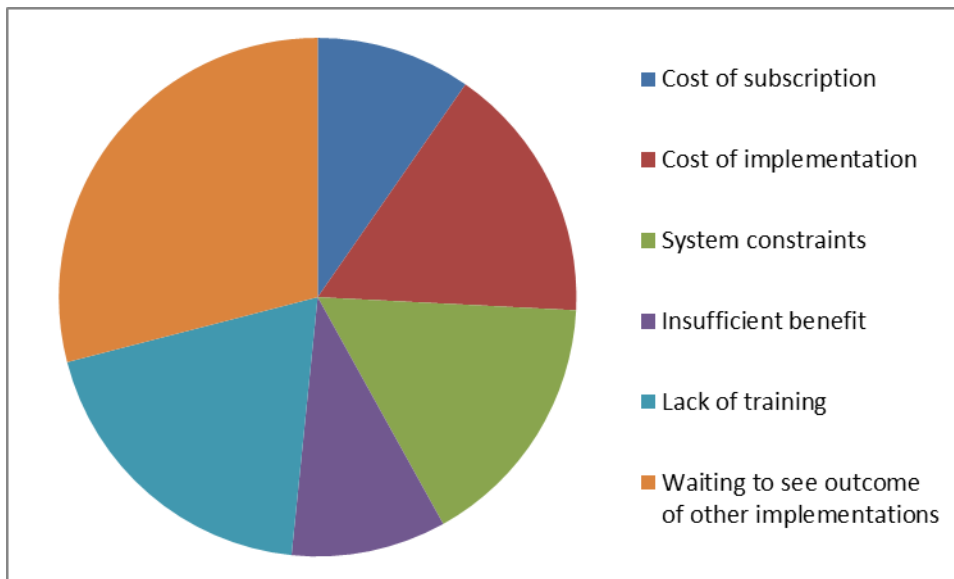
(AL) “We use vendor records which are RDA”

(AL) We don't want to be playing 'catch-up' with RDA. It's the current standard and we need to be current. We assumed we would need to move to RDA in order to continue our external obligation to such as RLUK. But then we were way ahead of them (still are!)”

(AL) "future-proofing" our catalogue - we see RDA as the way that cataloguing as going - don't want to be left behind!”

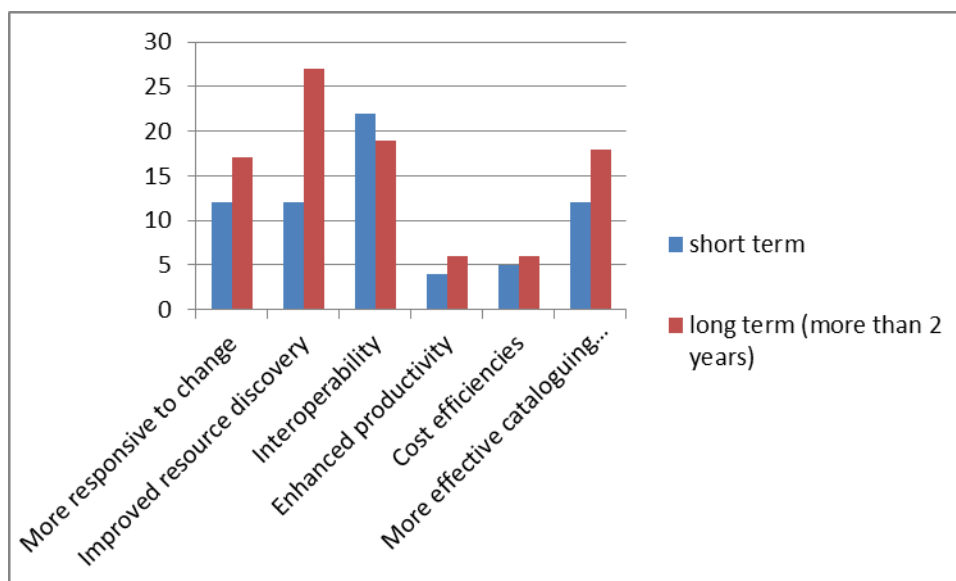
(BA) “We follow national agency (BL) policy”

## 5. What are your reasons for not implementing RDA?



	Respondents	%
Cost of subscription	3	6.4
Cost of implementation	5	10.6
System constraints	5	10.6
Insufficient benefit	3	6.4
“Lack of training”	6	12.8
“Waiting to see outcome of other implementations”	9	19.1

## 6. What benefits do you expect to gain by implementing RDA?



	short term	long term
More responsive to change	12	17.0
Improved resource discovery	12	27.0
Interoperability	22	19.0
Enhanced productivity	4	6.0
Cost efficiencies	5	6.0
More effective cataloguing of non-print resources	12	18.0

(AL) “Benefit from early implementation - learnt by doing”

(AL) “More, fuller cataloguing records.”

## 7. If you have implemented RDA, what impacts have you seen on productivity?

(AL) “Inevitably, original cataloguing (creating records from scratch) is slower, and there are hybrids out there that need to be tidied up. In the main, though, we’re able to upload enough good quality RDA records for more recent publications, which gives our cataloguers more time to focus on the more challenging original cataloguing aspect of their work.”

(AL) “More loss of productivity through time taken for training ourselves and also staff in supporting areas who deal with record creations (acquisitions, etc.). Also the time taken on working on system settings, bibliographic templates and training documents.”



(AL) “We mostly uses vendor records so as we make few changes there is little impact on productivity.”

(AL) “Little to report as yet, because RDA on copy cataloguing alone has not seen a drop in productivity.”

(AL) “We require longer to edit imported RDA records and longer to create a \*new\* RDA record. As we become familiar with the rules and overcome the bigger challenge of how to navigate around them in the Toolkit this extra time taken should decrease.”

(AL) “Probably no significant impact; RDA records are in the minority and the tag differences and changes to conceptual thinking required to catalogue according to RDA don't seem to have particularly slowed us down. But then, productivity has not gone up either.”

(AL) “During the planning, training and initial implementation stages, the backlog grew. In addition, we were not able to offer cataloguing training to paraprofessional staff, as all our efforts were focussed on RDA. Some types of records are taking us longer in RDA than AACR2, particularly "compilations". This is largely due to adding 505s for these records, whereas for AACR2 we did not add 505s for single-volume records. We are still finding too many downloaded records in AACR2, which is having an impact on our productivity. As we have assigned some staff to continue with AACR2, some to work solely in RDA and some to work with both, we have found that some priority items are taking slightly longer to pass through the cataloguing department as it may be a few days before the cataloguer in the "right" set of rules is working. (We are not upgrading AACR2 records to RDA).”

(AL) “Not much has changed”

(BA) “For most resources, the length of time to catalogue them is no greater under RDA. For some, however, there is considerably more name authority work to do due to greater number of access headings required under RDA rules. We see this as positive for the record, however. There was obviously a big impact on productivity initially, when staff were having to retrain their brains and assimilate the definitions of relationship designators, how to catalogue compilations and what to assume at CIP stage.”

(AL)-“Some general decline, but not disastrous for mainstream materials. Most cataloguers adjusted fairly fast. - Lots of agonising over statements of responsibility, AAPs and relators, mainly for art and foreign materials. Improving. - Much more NACO work, which reduces resources for bibliographic work. - Marked decline in availability of good external records (whether AACR2 or RDA) for copy cataloguing, especially for art and foreign materials, presumably because of reduced productivity in other agencies during RDA transition.”

(AL) “We have not implemented RDA, but we cannot see how it could possibly improve productivity in the short or medium term given that our current systems limit us to cataloguing at the manifestation level, and linking to works and expressions is artificially tied to name-title identifiers which are not usually present in our local

authority file. For acquisitions staff, acquiring external records, the absence of GMD in 245 makes it harder for staff to select a record for the correct material as our system does not identify the media from the new fields.”

(AL) “No significant impact, especially as we download the majority of our records from BL, BDS and LC, so RDA already.”

(AL) “Any 'dip' has been minimal as we're still in the early stages and not doing all e.g.: DVDs yet. It's not been as much of an impact as we may have thought.”

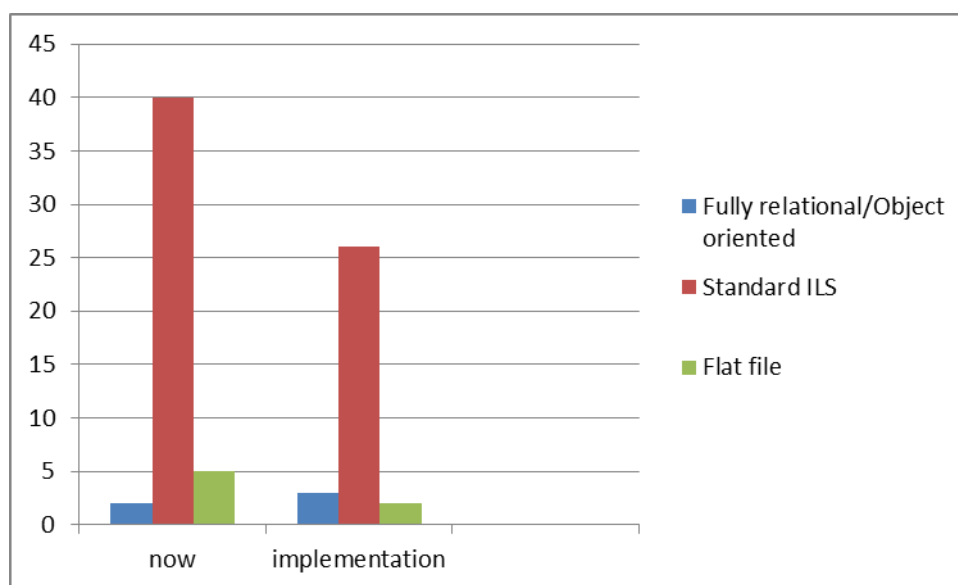
(NL) “Difficult to gauge - restructuring of departments, reductions in staffing, etc.”

(PL) “It takes longer to check and merge new name headings with existing name headings in our catalogue.”

(AL) “Both these things are essentially out of our hands, in terms of time or standards, and ability to customise technology. Our Primo discovery layer has FRBR-like features.”

(NL) “We implemented RDA on 1st April. We see little direct impact on descriptive cataloguing; we have seen an increase in the number of authority records created and the time taken to create authority records. We have mitigated the impact by imposing some restrictions on creation of access points for certain types of publication and the information recorded in authority records.”

## 8. Which of the following best describes your database structure?



	now	implementation
Fully relational/Object oriented	2	3
Standard ILS	40	26
Flat file	5	2

## 9. What are your plans for FRBRisation?

	Yes	No	Undecided
Planning to frbrise data retrospectively	3	9	30
Planning to frbrise user interface	7	4	31

(AL) “The FRBR model poses fundamental questions for music. Are 20 settings of the same text 20 separate works or 20 expressions of the same original work? Is a setting of the proper of the mass a work or an expression? Is Mozart's Le nozze di Figaro a work or an expression of Beaumarchais' Le marriage de Figaro? If we cannot safely distinguish between the work and the expression, how are we to define the manifestation?”

(AL) “We are dependent upon what discovery systems/LMS offer”

(“PL) “Won't know unless and until we change LMS”

(AL) “Assume the latter will come with Capita updates”

(AL) “Finances will probably be the main factor!”

(AL) “Already using Primo, which is quasi-FRBR. Cannot even consider change unless/until we see some attractive products; and actual change would depend on finding the money to acquire them.”

(AL) “We are dependent upon our resource discovery supplier and their developments”

(AL) “We are part of the WHELF shared LMS tender so we await the outcome of this exercise.”

(AL) “Will depend entirely on LMS supplier.”

(AL) “Our user interface, 'Primo', groups editions together on the results screen by deduplication of the records into one displayed record. In that sense only our user interface is FRBRised”

(AL) “Implementing Primo which tries to FRBRise user experience. Current systems would not properly support FRBRising data.”

(AL) “Honestly, I'm not entirely sure what this means”

(AL) “Extent to which we can FRBRise records is dependent on LMS capabilities”

(AL) “Both these things are essentially out of our hands, in terms of time or standards, and ability to customise technology. Our Primo discovery layer has FRBR-like features.”

(NL) “These are long term goals and we have no immediate plans to FRBRise our data. There are several enhancements that we need to make to our legacy data before we would gain substantial benefit from FRBRisation. Our public interface already has a FRBRisation function and we are considering the broader application of FRBR model to discovery.”

## 10. Which material types are in scope for RDA at your institution?

	In scope	Out of scope
All materials	21	1
Printed books and serials	28	0
Cartographic resources	15	5
Music	17	6
Archival materials	1	18
Manuscripts	2	14
Objects and realia	6	8
Sound recordings	20	2
Graphic Materials and still images	8	9
Moving images	17	5
Ephemera	10	7

(AL) “Electronic resources in scope.”

(AL) “Anything that is not books held in the Archives are not catalogued on our LMS but on Adlib & done to archive standards. Rare books done to DCRM(B), other special collection books depends if can find records. Music probably will be in scope eventually but we have minimal stock here, ditto maps.”

(AL) “We will move to RDA cataloguing of A/V when we can source them. We will catalogue off-air recordings to RDA when our current LMS is upgraded at Christmas.”

(AL) “All of our material types, bar our Archival material, are considered in scope for RDA. Our Archives is a separate team, with separate cataloguing, and the issue of RDA for Archival material has not yet been considered.”

(NL) “At present, only post-1900 published materials being catalogued in RDA.”

(AL) “Most archival and manuscript materials are catalogued on separate system”

(NL) “Only those content streams which used AACR2 and MARC 21 have been migrated to RDA.”

The British Library and Library of Congress both officially embarked on full RDA cataloguing at the start of April 2013. Since BDS supplies the BL with pre-publication information for the CIP contract, it was agreed with them that all BDS records created or updated from the start of January 2013 would be catalogued using RDA, making BDS one of the earliest adopters of RDA.

As BDS's designated lead on RDA implementation, my role was to gain sufficient understanding of RDA to inform the changes we would need to make, both to our in-house system and to processes, and to provide internal staff training. Knowledge and experience gained in these early stages then helped to create the presentations I've given since to representatives from various library authorities.

I studied the RDA Toolkit, and the training materials provided online by the Library of Congress and the British Library were gratefully received and assimilated. However, as was proved by an e-forum organised by CIG in October 2012, real progress couldn't really be made until we actually attempted to catalogue following RDA guidelines.

In preparation for the switch from AACR2 to RDA, all relevant BDS staff attended an in-house presentation on FRBR. This introduced the terminology and relationships integral to the structure of RDA.

A month before implementation, I met with key staff and we went through the main RDA changes, discussing policy as we worked. This resulted in a collaborative approach and alleviated the nervousness involved in implementing RDA before other organisations, especially the British Library to whom we would normally look for guidance.

It was also noted that the biggest changes that RDA presented to cataloguing practice could not be realised in a MARC-based catalogue, and so the implementation of RDA in MARC is actually a smaller step than full implementation of RDA.

The next month was spent finalising IT developments and training materials for the switch, with the key staff spending some time on cataloguing in RDA in order to try to spot more points for discussion and policy decisions. Having our own system was extremely useful as we were able to incorporate features to help speed data entry, such as relationship designators applicable to specific tags and single line defaults in a local tag which are converted into a wide variety of 336, 337, 338 options.

The training was practical and to the point. As quickly as possible we moved on to working on real records, with the firm instruction to 'work out loud', not something we usually do in BDS. The following weeks included much discussion of various problems and periodically I called staff together to see a particularly 'good' example and the eventual solution.

The areas we found challenging were: navigating the RDA Toolkit; taking title information exactly as given on the title page but being able to take statements of responsibility from anywhere in the resource – or beyond; being able to take publication dates from other sources such as the Internet; the possible confusion between collaboration and compilation, especially in art books. Our AACR2-trained brains found it very difficult to move away from the "Artist as main entry" for exhibition catalogues. Partly, of course, the difficulty is due to the main entry hangover that exists when trying to create an RDA record in MARC - MARC still requires a main entry, and RDA does not. Staff (and customers) struggled with the difference between RDA content and the MARC tags required to display that content.


The emphasis on cataloguer's judgement has also proved awkward as our customers expect us to maintain consistency in our records rather than having everyone making different (but correct) choices.

Three months after implementation, the key staff met again to discuss and review our policy decisions to date. We formalised policy that had developed during the first phase of implementation and agreed some modifications based primarily on information available from online forums. Our in-house RDA MARC manual and documentation of procedures and policy are continually reviewed.

In the first three months of 2013, productivity overall dipped by 10% compared to the same quarter in 2012. Part of this productivity dip was due to having to change records from AACR2 to RDA, for the book-in-hand records which had their CIP records created before the end of 2012. Productivity statistics for the month of October 2013 show no significant difference from those for October 2012.

To assist our customers, we started off in September 2012 with an email stating BDS's official start date for RDA and outlining the most essential and obvious changes and differences: the 'i' code in the leader; relator terms; abbreviations; Latin words and phrases; the loss of the rule for more than three authors; headings for sacred works; replacement of GMDs with content, media and carrier and their new MARC tags. We also, with his agreement, gave the practical information offered by Stuart Hunt at the CIG conference on how to prepare an LMS for RDA and the questions to ask the LMS suppliers.

We emailed all the main LMS suppliers and library suppliers to try to find out how prepared they were for RDA and invited responses from all suppliers and customers on any adaptations to our data supply which might be required in the short to medium term until systems were fully updated. As expected, the biggest problems



were loss of GMDs and the new 264 tag, both of which are still causing problems in some systems.

We've followed up the initial emails with RDA training sessions in association with CIGS and also with individual customers and groups of customers around Britain.

In the same way as RDA itself continues to evolve and develop, BDS will continue to improve its RDA understanding and be prepared to pass that knowledge on to customers.

### Background

University of the Arts London (UAL) is a specialist art and design institution with approximately 19,000 students. It is made up of six constituent colleges scattered across various London sites. UAL Library Services (LS) holds approximately 500,000 physical book and DVD volumes, and provides access to approximately 70,000 periodical titles (print and online).

Bibliographic Services at UAL LS were recently centralized during a restructuring process in 2011. Academic support librarians at each site select materials for purchase, but the centralized team of three librarians and four library assistants perform all ordering, receipting, cataloguing, and processing of new books and audiovisual materials (though processing of most new books is carried out by our suppliers). Centralized Bibliographic Services (CBS) also orders individual ebook titles and helps to manage patron-driven acquisition ebook projects. Other electronic resources and subscription materials are handled by the E-Info Team within the Resources & Systems division.

As art and design disciplines are still heavily dependent on print resources, UAL doesn't have as high a proportion of electronic resources as many other institutions. We do provide access to over 7,000 ebook titles, mainly through a package subscription from ebrary, Inc., and individual purchases from DawsonBooks.

Most cataloguing in our local Voyager system is still done in-house by staff in CBS, though records for certain subscription packages (such as ebrary ebooks) are provided by the supplier and bulk loaded into Voyager by Library Systems. Resources may be discovered via the OPAC<sup>1</sup> or through our Summon discovery platform<sup>2</sup>.

### RDA plans

In January 2013, CBS established its interim RDA policy: basically, to happily accept both RDA and AACR2 records for copy cataloguing, but to continue creating original records according to AACR2. Tag tables were updated, CBS staff were trained appropriately, and documentation to help staff recognize new features of RDA records was created. Plans to fully implement RDA (i.e., use RDA for our original cataloguing) were made for Summer 2014, when there would be time to train all necessary R&S staff, as well as other LS staff who perform occasional cataloguing duties.



## Surprise!

In October 2013, CBS staff discovered that ebrary would begin providing RDA records for newly-added titles in its subscription packages, beginning with the next release of supplied MARC records on 24 October. The new records would also follow the Provider Neutral guidelines for ebooks as established by the Program for Cooperative Cataloguing<sup>3</sup>. This brought about several changes to the records, and we realized we needed to make some fast decisions.

## Effects

These new standards would bring about several changes to our catalogue. The most significant for us were:

- Form of item fixed field. This is not an effect of RDA, but the implementation of a change to MARC21 coding from 2010, which allows for different coding of “online” and “direct electronic” [e.g. CD-ROMs] electronic resources. Previous records were limited to the more general code “s” for all electronic materials<sup>4</sup>.
- Elimination of the general material designation (GMD) 245\$h [electronic resource]. In RDA records, the GMD is replaced by the 336/337/338 fields.
- Use of 797 instead of 710 for added entry for ebook provider (“ebrary, Inc.”). In provider-neutral ebook records, 710 is considered inappropriate for the ebook supplier, as the same bibliographic record might be used for an ebook supplied by multiple vendors. Ebrary had therefore chosen to use 797, a “local added entry” field available in OCLC’s application of MARC format (though not included in the standard MARC21 bibliographic format!)<sup>5</sup>.

Other, more minor (for us) changes included the addition of subfield q in 020; use of MARC tag 590 instead of 533 for reproduction note; and use of other fields and subfields new in RDA, including the 336/337/338 family and relator codes and terms in 7XX fields.

These changes mattered to us because:

- The Form fixed field is used by our OPAC and our Summon discovery tool for limiting searches and identifying electronic materials.
- The GMD is used by both staff and patrons to aid in selection of the correct record from a list of titles in the OPAC and the staff modules. This is useful not only for patrons faced by what appear to be several duplicate records, but also for staff linking orders to bibliographic records. In fact, this feature is so essential, we had long ago adopted a nonstandard approach to GMD for DVDs, using “[videorecording DVD]” instead of the standard “[videorecording]” in our records. This allows us to differentiate between

DVD and VHS versions at a glance (due to the nature of our collections, we still have relatively extensive VHS holdings). The use of “[electronic resource]” is similarly essential for us in differentiating between print and electronic copies of a book, so that order records are not attached to inappropriate bibliographic records, and patrons can identify desired materials more quickly.

- The 710 added entry is used locally to identify ebook records for a variety of administrative and database maintenance purposes.

### The compromise

While we are happy to largely accept the records as they are, after discussion between CBS and Systems staff, we decided to make some changes to the records, including:

- Continued use of the GMD. We felt that the benefits of faster, more accurate identification of records by staff and patrons outweighed the disadvantages of retaining this AACR2 practice in RDA records, at least for the present time. We hope that our next LMS/discovery platform will provide format information in title result lists using something other than the GMD; we can then explore removal of GMDs from RDA records.
- Change of 797 field to 710. Retaining the added entry for ebook supplier was important to us. While we felt that our nonstandard GMD use provided real benefits, we felt that adding a nonstandard MARC field to our tag tables (for no apparent benefit) was going too far.
- Addition of relator term “\$e supplier” to the 710 field. While this will make little difference to patrons, it is an opportunity to get our feet wet with regards to assigning relator terms, an important aspect of RDA. We debated the use of relator codes (710 \$4) instead<sup>6</sup>, but felt they were of even more limited use as of yet, and would be vulnerable to change when the MARC format is replaced. We chose the relator term (710 \$e) as it provides words and phrases which can be easily understood in the OPAC display by staff and patrons. While “supplier” is not currently listed in RDA’s Appendix I<sup>7</sup>, RDA states that cataloguers may use “another concise term” as necessary.

Additional changes or adaptations were as follows:

- Form of Item. Systems staff have made necessary changes to Voyager and Summon to ensure that all necessary Form of Item codes will function properly for display and search limiting, with a minimal need for cataloguers to edit this field.
- 020 \$q. This new subfield for qualifying information for numbers such as ISBNs was introduced in MARC 21 format update number 17<sup>8</sup>. We added the subfield to our tag tables and adopted it for original cataloguing in all formats, as we hope there are long-term benefits to separating standard

numbers from qualifiers such as “hardback,” “paperback,” “e-book,” etc.

- Other RDA fields (336/337/338, 264) were already in use due to our RDA interim policy and presented no problems.

Records are edited in MARCedit by our Systems team before being batchloaded into our local Voyager system. In MARCedit, staff can make these changes (such as changing 797 to 710, or adding the GMD) very quickly and easily.

### Benefits, and looking to the future

There were a number of fringe benefits to our slightly panicked adaptation to changes in these records, namely:

- Our more detailed examination of RDA was kick-started, and we have begun trialling original RDA cataloguing sooner than expected.
- We established documentation of editing guidelines for bulk loaded ebooks for the first time, allowing for greater consistency and efficiency.
- We have had the opportunity to contemplate potential database cleanup projects for the future prompted by RDA and other changes. For example, transformation of GMDs to appropriate 33X fields in the future will allow us to do away with nonstandard and inconsistent application of GMDs in records for audiovisual materials. Addition of relator terms or codes to access points may provide more granular searching for patrons. However, this cleanup process must work hand-in-hand with selection and implementation of new LMS/discovery layer products to ensure that are able to fully exploit RDA’s potential without losing beneficial aspects of AACR2 as far as possible.

### References

<sup>1</sup>See: <http://voyager.arts.ac.uk>

<sup>2</sup>See: <http://arts.summon.serialssolutions.com/>

<sup>3</sup>See: <http://www.loc.gov/aba/pcc/bibco/>, Combined provider-neutral e-resource guidelines for RDA

<sup>4</sup>See: MARC21 Bibliographic format : 008: books, <http://www.loc.gov/marc/bibliographic/bd008b.html>

<sup>5</sup>See: Bibliographic formats and standards : 797 : local added entry – corporate name, <https://www.oclc.org/bibformats/en/7xx/797.html>

<sup>6</sup>See: <http://www.loc.gov/marc/relators/relaterm.html>

<sup>7</sup>Resource Description and Access, Appendix I, Relationship designators : relationships between a resource and persons, families, and corporate bodies associated with the resource.

<sup>8</sup>See: <http://www.loc.gov/marc/bibliographic/bdapndxg.html> , MARC 21 format for bibliographic data, update no.17 (September 2013).

Over the last couple of years or so, there have been a number of ‘alternative’ meanings of the acronym for RDA from ‘Retirement Date Approaching’ to ‘Really, Don’t Ask’. As a result of our implementation here at Kingston, we’d like to propose our own acronym: ‘Relax, Deadlines, Adjust’.

## 1. Relax:

**KC:** Firstly, Relax. Yes, it’s easy to say it, quite another to actually manage it but (and I hate to use such a clichéd phrase) the world is not going to end just because you’re now cataloguing in RDA. That’s not to say it’s not important to plan or take it seriously (more of that under deadlines) but that it’s important to keep it in perspective. There were a couple of times in the run-up where I had a bit of a ‘Oh my goodness, we’re actually going to have to do this’ moment, but they soon passed.

**NW:** Going to the CIG RDA Workshop in Warwick made me more relaxed about the process as everyone was saying “you just have to get on with it”. I was surprised at this, I thought I would come away from the day feeling like we had a mountain to climb but instead I felt excited about the project at Kingston and my feelings didn’t change much towards the run-up.

**KC:** Deciding we’d continue to download AACR2 records where they existed, rather than catalogue *everything* in RDA helped to ease our fears as well in terms of the workload, especially with a large number of books for a couple of the collections in our Archives & Special Collections still awaiting cataloguing.

## 2. Deadlines:

**KC:** Deadlines. Love them or loathe them, having a clear date in your head does help. At the CIG RDA pop-up event, at least 2 people said that ‘setting a date’ really helped them. We decided fairly early on that we *would* move to RDA, building it into both departmental and personal workplans over the last couple of years.. After many conversations that went along the lines of “So, we must set a date for RDA” - “umm, probably the autumn?...” the Collections Manager finally pressed for a date and 1<sup>st</sup> October was picked, pretty much as a reasonable first-of-the-month-date (plus it seemed a long way away). It was only later that we discovered that that was the date the Cambridge University libraries were moving, which was quite nice as it had an element of ‘cataloguer solidarity’ about it, knowing that there were others going through the same as us. I almost wish now I’d marked the ‘RDA day’ itself more as it wasn’t all the fanfares & trumpets I thought it might be, in fact it was quite late in the afternoon when I actually catalogued my first book ‘officially’ in RDA.

**NW:** Being new to my job and Kingston and having only some RDA knowledge prior to starting the job meant I felt I had a lot of pre-planning and self-training to catch up on. Thankfully there is a wealth of tutorials and webinars to immerse yourself in which quickly got me up to speed and increased my confidence.

**KC:** Having a deadline firmly placed RDA on the agenda at departmental meetings and gave us timescales when liaising with colleagues on the technical side of things as it was a tangible 'project' rather than just a vague proposal of something we'd like to do at some point. It also stopped it getting side-lined amongst all the other things we do and gave us a sort of mental 'justification' to play around with records and read around the topic more than if it was still a 'future' thing.

### **3. Adjustments:**

**KC:** Thinking about RDA, it seems less scary to view everything as 'adjustments' rather than changes. It's sort of like ordering a burger but asking them to not include the sauce, it's still a burger, just a little bit different.

There have been quite a few adjustments we've had to make, both on a technical and personal level, some of these will be the same as what you might experience, some you won't have, others you might have that we didn't.

#### **a) Adjusting your system:**

**KC:** It has been said many times in webinars and at training events that there may be some technical adjustments you have to make to your LMS. We certainly had to alter ours to accept the 264 field and the 336/337/338 fields as valid and also to make the 264 field to display in the public view. We're also investigating the indexing of 100 and 700 fields with the subfield e for the relationship designators in our public catalogue. This has perhaps been the most frustrating part as we'd been told our LMS was RDA 'ready' when perhaps that should have been reworded as RDA 'compatible'. It's been very interesting though to work with those who run the systems side of things and I think we've both learnt a little more about what we each do.

#### **b) Adjusting your expectations:**

**NW:** Getting used to the new fields and actually remembering to add them to new records took a bit of extra time initially, but now we've been doing it for almost two months I don't feel that it takes any longer than it did previously. I expected it to take much longer and have been surprised at how quick we've become used to it.

**KC:** The biggest adjustment I've found in terms of day-to-day cataloguing is the inclusion of relationship designators in the 100/700 fields, especially for relationships I'd not previously considered such as 'host institution' on the exhibition catalogues. Some of them I will confess I've got "wrong" once or twice until I've got my head around *exactly* what they were intended to be used for, but I don't think that's too much of a problem as it's very much a learning as you go process.

### **c) Helping others adjust:**

**NW:** We took the approach here at Kingston that "less is more" in terms of training for others and have been giving quick "RDA: What It Means For You" presentations to all the teams in Library and Learning Services. The feedback has been excellent and keeping it simple means (we hope!) everyone understands the changes. The only problem has been finding time for the training amongst other commitments and has meant that it has taken place over a few months rather than weeks.

**KC:** At Kingston the subject teams do carry out some basic cataloguing. We made the decision not to ask them to catalogue in RDA just yet which has given us time to get up to speed with it first. The catalogue is a hybrid mix of AACR2/RDA anyway and the volume of cataloguing they do isn't vast so it won't have that much of an impact.

The support from the senior management here has been really good. RDA has always been viewed and discussed very positively and the move was built into our strategic planning. Management readily accepted that the benefits outweighed any potential 'dip' in productivity without the need for a formal business case to be written. They have also been very supportive of us attending training even well in advance of setting an actual date to move to RDA.

### **Final thoughts:**

Overall it's been a really positive experience. We've engaged much more with the profession as a whole through attending events, taking part in webinars or just asking people questions. There's been a great deal of everyone supporting each other through it all in the cataloguing community.

Within our workplace too it's given us an 'excuse' if you like to engage with other teams, making us much more visible. Being present at team briefings and at training events has given people a greater understanding of what we do and hopefully made them more comfortable about approaching us if they do have cataloguing queries.

Whatever stage you're at with RDA, good luck and remember,

'Relax, Deadlines, Adjust'.

**CIG E-FORUM ON ADOPTING AND WORKING WITH RDA**

**Monday 13th January and Tuesday 14th January 2014, 10am-4pm each day**

**An e-forum discussion on RDA hosted by the Cataloguing & Indexing Group (CIG) of CILIP. Co-moderated by Thurstan Young from the British Library, Katrina Clifford from Kingston University and Helen Williams from the London School of Economics.**

**Please join us—it's free and open to everyone and a great way to start the New Year!**

**To date, RDA has been implemented by 16 organizations within the U.K. including the British Library & Cambridge University Library. A further 14 organizations plan to implement over the next 18 months. This CIG hosted e-forum will address the process of preparing for RDA. Topics to be covered include:**

- business case**
- training implications**
- technical infrastructure**
- productivity**
- cataloguing policy**

**You will get practical guidance appropriate to the stage you are at in the implementation process.**

**Find out more about how e-forums work and how to register on the CIG website:**

**<http://www.cilip.org.uk/cataloguing-and-indexing-group/events/cig-e-forum-adopting-and-working-rda>**

#### **Introduction**

The British Library formally implemented RDA on 1<sup>st</sup> April, 2013. This may have been a gift to satirists and cynics, but it was synchronised with implementation by the Library of Congress.

#### **Context**

The British Library is the National Library of the United Kingdom. It is a legal deposit library, responsible for preserving the national printed archive. In 2012/13 Legal Deposit intake was 122,873 printed books. Legal deposit also covers maps, music, play scripts and serials, which are deposited in more modest quantities<sup>1</sup>. The Library also acquires resources for the collection by purchase, exchange and donation. It is also worth mentioning that the RDA implementation preceded the extension of legal deposit to non-print resources by 3 days.

The Library has two main sites, located 200 miles apart, in London and West Yorkshire. The Library employs approximately 1500 staff<sup>2</sup>. The main processing teams are based in Boston Spa, but many specialist staff based in London also process collection items.

Prior to RDA, the Library used AACR2 for cataloguing printed resources; supplemented by DCRM and Cartographic Materials for specialist collections. Archival and manuscript materials are in a separate content stream that follows archival standards, so were out of scope for RDA. Sound Recordings and Chinese and Japanese collections were also out of scope because they are hosted on other systems and use different descriptive standards and schema.

From the early 1990s, the Library's cataloguing strategy has been based on deriving or reusing catalogue records. For this reason, we have aligned the standards for our main content streams with Library of Congress.

#### **Business Case**

The Library is a partner in the development of RDA. The development of RDA is intended to satisfy short term and long term requirements.

In the short term, RDA is superior to AACR2 with regard to description of non-print resources. RDA enhances access to all types of resources by providing comprehensive instructions for authority control and relationships.

In the longer term, RDA is one strand of a strategy to update the infrastructure and enable libraries to exploit the potential of Web technology to expose the content of their collections.

It was estimated that implementation would result in a shortfall of 20-25k items on the processing KPI. This was mitigated by front loading the process, pushing more material through the process before training started



and outsourcing where possible.

We estimated that the annual cost of licensing the RDA Toolkit is greater than the annualised cost of replacing printed AACR2 every 5-7 years. We mitigate the cost, as much as possible, by taking advantage of deals offered by the publisher (2 for the price of one). A report available via the Toolkit enables subscribers to monitor the number of concurrent users and maximise the value for money from each license.

The automatic update of RDA in the Toolkit means that cataloguers no longer have to manually annotate or paste amendments into their rules, as was the case with interim revisions of AACR2.

## Project Organization

There was no blueprint for implementing a new cataloguing code. The Library last changed cataloguing codes when it adopted AACR2, in 1981. We reviewed other large projects, such as MARC 21 implementation, to see what worked and to estimate scope, timescales and impacts.

Overall responsibility for the implementation was within my portfolio as Metadata Standards Manager. A member of my team, Thurstan Young was appointed as Project Coordinator. We set up expert groups in Boston Spa and St. Pancras. The expert groups were drawn from experienced cataloguers and team leaders who would provide the vanguard of trainers and practitioners.

We identified the capability to produce RDA records as the deliverable of the project. To achieve this we would need to reconfigure systems, revise documentation and train staff. We therefore worked closely with colleagues in the Aleph Support Team, the Metadata Systems team and the Documentation and Training Team.

Although we eventually set a target date for implementation, it was never conceived of as a big bang. RDA was phased in gradually by adding capability to systems and by increasing the number of staff working in RDA over the course of 2012-13.

Timeline	RDA Implementation at BL	External RDA Milestones
2005		JSC Announces RDA project
2007	RDA Expert Groups formed in BSp and StP to comment on RDA Drafts	Early drafts published BL, LAC, LC, NLA announce intention for coordinated implementation.
2008	Implementation Project established Staff Awareness	Full Draft of RDA published for comment
2009	Thurstan Young Appointed RDA Implementation Project Coordinator RDA Implementation Environment set up on Aleph Staff Awareness	Final Text sent to publishers in June.

Timeline	RDA Implementation at BL	External RDA Milestones
2010-11	Toolkit evaluation Aleph Configuration & Testing Staff Awareness Training, workflow and policy development Train the trainers Batch Upgrade testing St Pancras Expert Group re-established following restructuring	RDA Toolkit Published US RDA Test LC announces Jan. 2013 as earliest implementation Date European RDA Interest Group formed (Chaired by BL) Deutsche Nationalbibliothek announces intention to implement RDA.
2012 Q1-2	RDA Name authority records contributed to NACO Redistribution of derived RDA bibliographic records to customers	Deutsche Nationalbibliothek joins JSC National Library of Scotland defers implementation to 2014
2012 Q3-4	RDA original cataloguing piloted Authority Control Training Catalogue Support and Acquisitions Training Bulk Toolkit License purchase FRBR/RDA Refresher and Toolkit session in BSpa	NACO Phase 1 Changes distributed Asbestos in BSp: training replanned
2013 Q1	Cataloguing in Publication switched to RDA Cataloguer training in BSp and StP. PRIMO changes	NACO Phase 2 changes distributed
April 2013	British Library announces RDA implementation	Implementations announced: Library of Congress, National Library of Medicine Cambridge University Oxford University

## Systems

The Library's main cataloguing platform is Aleph. RDA initiated substantial changes to MARC 21, therefore we created an RDA environment in Aleph, to test configuration changes and allow the expert groups to practice without affecting the production database.

MARC 21 changes required numerous configuration changes to Aleph. The Library is able to make these changes directly in the Aleph Tables, without involving Ex Libris. As well as defining the properties of the new elements, some new indexes had to be created. These included indexes for Content, Media and Carrier

Types and for the many new authority attributes. These changes were documented and made available outside the library<sup>3</sup>. A great deal of work was also done to review and update templates and macros used by staff throughout the workflows, including selection and acquisition as well as cataloguing.

Another major task was to review the impact on the Batch Upgrade system. This process automatically updates BL & LC CIP records after the item is receipted and a full record is imported from Library of Congress. The introduction of a new set of cataloguing rules meant additional checks and decisions during the matching and merging process. Batch Upgrade makes a significant contribution to achievement of our production targets, so this work had high priority and was completed by June 2012.

There were similar considerations in relation to our validation tool, MARC Report. Validating MARC records against two standards is more complicated than against AACR2 only. The Library worked closely with the developers, TMQ<sup>4</sup>, to ensure that MARC Report continues to meet our needs. TMQ's solution was to enable validation of AACR2 only, RDA only, or mixed files of records.

We made minor changes to the configuration of Explore the British Library, our public discovery interface. Explore is an implementation of PRIMO. RDA offers a lot of potential for enriching discovery, but the current volume of RDA data within our catalogue is too small to warrant substantial changes to PRIMO. Future development of PRIMO will also be dependent on enhancements to the consistency and content of our legacy data.

## **Training**

In such a large and complex organization as the British Library, the training plan was never going to be simple. There were several different plans for groups of staff.

## **Trainers**

These received training in how to deliver training. They also received introductory training in RDA based on the training modules developed by Library of Congress. They were given the time and encouragement to go and practice and to come back with questions and issues, which we would then try to resolve and feedback into the training materials.

## **Processing staff**

Staff whose job includes bibliographic processes, but who are not cataloguers, for example selectors, acquisitions staff, copy cataloguers, finishers and shelf markers, received job focused training. The documentation they use was revised. Training was mainly delivered in the team setting, with a couple of classroom sessions. The managers of these teams received the cataloguer training.

## Cataloguers

The training plan for cataloguers was delivered in three stages.

Stage 1: Orientation: introduction to FRBR model and RDA. Introduction to new terminology and concepts.

Stage 2: Familiarisation: reminder of FRBR; RDA structure; changes from AACR2; RDA vocabulary; navigating the Toolkit.

Stage 3: Implementation: Modular training course based on Library of Congress materials; hands on practice; review period.

Each team received training over a week, delivered by the manager and another member of the expert group. Each module was followed by hands-on practice. During the review period work was checked and gradually increased in complexity. This period varied between a few days and a couple of weeks, until the team manager was satisfied.

Specialist staff received additional modules, but all cataloguers received the same basic training. Following implementation, teams were offered the option of attending “FRBR for the terrified” and RIMMF<sup>5</sup> sessions, which looked forward to future application of RDA in a world without MARC.

227	Total Staff trained
121	Cataloguers trained
106	Processing Staff trained

## Documentation

In addition to documentation created for training, we reviewed and amended existing policy documentation.

At an early stage in planning we decided to make use of the Workflow tool provided with the RDA Toolkit. A small group was set up to work on different content streams. The workflows were envisaged as a mediation layer on top of the instructions, which would guide cataloguers through the record creation workflow for different content streams. The workflows highlight decision points and provide links to RDA instructions, British Library or LC/PCC policy decisions and the MARC manual. They took a lot of work to create and they have to be maintained, but they have reinforced training and consistent application of RDA. The workflows have been published in the RDA Toolkit<sup>6</sup> for the wider community.

## Application

If implementation is booking the flight; application is the journey. Our experience so far has been positive. Cataloguers on the whole (tell me that they) like RDA and appreciate what it is trying to do. However, there

are some productivity concerns.

The main issue has been around authority control. We have a “team” authority control measure which was 20% prior to implementation, but has now climbed to 33%. This means in effect, that staff who carried out AC work on behalf of colleagues spent one day a week on this in the past, but are now spending close to two days a week.

We are addressing this by making some changes to workflow and reprioritising some authority control projects to focus on production.

We have noticed that more time is being taken up by specific types of resource under RDA, particularly conference proceedings and compilations. We have reluctantly introduced local policies to limit the number of authorised access points assigned to these types of resources. We hope that some clarifications to RDA, recently approved by JSC, will also help.

### **And finally...**

There was a collective sigh of relief on 2nd of April. I have mentioned several “teams”, but these are often the same few people wearing different hats. A glance at the time line shows what a long process this has been. Inevitably, over such a long period and with several delays to RDA’s publication, maintaining belief of those not directly involved in the project can become an issue. We kept staff informed and engaged through the CPD seminar programme.

Our two biggest “crises” were:

- the loss of virtually the whole expert group in London as a result of restructuring;
- the closure of training rooms shortly before we were scheduled to start training 200 staff. Sterling work by the training team kept the show on the road.

And in the end we succeeded because everyone involved was committed to making it work. The next challenge is to exploit RDA and make improvements to discovery that users can appreciate.

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<sup>1</sup> The British Library Annual Report and Accounts: 2012/13. Page 19 <http://www.bl.uk/aboutus/annrep/2012to2013/annualreport201213.pdf>

<sup>2</sup> The British Library Annual Report and Accounts: 2012/13. Page 76 <http://www.bl.uk/aboutus/annrep/2012to2013/annualreport201213.pdf>

<sup>3</sup> <http://www.bl.uk/bibliographic/catstandards.html#rda>

<sup>4</sup> <http://www.marcofquality.com/>

<sup>5</sup> <http://www.marcofquality.com/wiki/rimmf/doku.php>

<sup>6</sup> <http://www.rdatoolkit.org/>

### Introduction

With not only the Library of Congress and British Library moving to RDA in 2013 (Wiggins, 2012; Danskin, 2013), but also major research libraries including Cambridge University Library, the Bodleian and Trinity College, Dublin (Carty, 2013; O'Reilly, 2013; McManus, 2013), while others are adopting a wait and see approach (Gryspeerd, 2012), it is not only current cataloguing staff who are required to understand and be able to create records in both the old (AACR2) and the new (RDA) cataloguing standards; library school students must prepare for a working life in which their future employers may be looking for expertise in one standard, or the other, or both. With the same amount of class time available on the MA LIS for instruction (30 hours), this article suggests that the future of cataloguing education, like the future of catalogue records themselves, may be hybrid.

### Cataloguing in the curriculum

In the 21<sup>st</sup> century, there has been a move in the UK Higher Education curriculum away from teaching the specifics of cataloguing standards and formats towards a more general approach as part of wider modules such as Knowledge Organization, Information Retrieval or Information Architecture (Bowman, 2006; Whalen-Moss, 2007; Wiley, 2011). Some educators advance practical reasons for this – as M. Cristina Pattuelli puts it in an article surveying introductory Knowledge Organization courses in ALA accredited library schools, “Core competences need to evolve in response to the changes taking place in professional practices and the new areas of expertise needed for today’s library and information work environment” (2010). Describing the approach taken in the well-respected programme at City University, David Bawden asserts that “while it is essential that students gain an awareness of the principles of cataloguing and of resource description generally, it is not appropriate to include detailed instruction in any specific system or format” (2012). Building on Pattuelli’s pragmatic approach, he also puts forward an academic view that

also reflects that fact that the practical competences of traditional cataloguing, though still a relevant set of professional skills for some contexts and circumstances, are not really the stuff of Masters level education: as Maurice Line put, in typically robust fashion, “Cataloguers would lose much of their status if it were shown that most cataloguing is a trivial job easily done by clerical staff”. (Bawden, 2012).

Whether we agree with Line quoted by Bawden (and it should be clear that I do not), there remains a demand in the UK for an education in cataloguing that encompasses both the theoretical and the practical (Carlton, 2011; Grim, 2011; Howard, 2011; Maule, 2011; Middleton, 2013). It is evident from the current job market that,

notwithstanding the debates around recruiting for attitude rather than skills (Jardine, 2007; Armstrong-Viner, 2012), there are still plenty of roles advertised in which practical knowledge and experience are sought. A quick web search found these examples, amongst a dozen similar ones:

*Library Assistant (Deputy Cataloguing and Metadata Manager) - SB937*

*University Library, Salary: £20,764 - £24,049 per annum*

... You will be able to demonstrate experience of database work. A good working knowledge of cataloguing practice and standards is essential as well as experience of working in a library environment (University of St Andrews, 2013, my italics).

*Arabic Cataloguer (Fixed-term) Salary: £24,000 per annum pro rata*

... Applicant should have an extensive knowledge of ACR2/RDA and MARC21 cataloguing rules as well as LC classification/subject schemes and Name authorities. Successful candidate should readily adapt to the Library Management systems used by the Institute including 'WorldCat connexion client and Symphony. (Aga Khan University, 2013, my italics).

*Part-time Library Assistant (Chinese Department)*

... Familiarity with RDA/AACR2 and MARC 21 cataloguing rules and with the cataloguing and acquisitions modules of the Voyager library management system is also desirable ... Salary £18,005-£20,764 pa, pro rata. (University of Cambridge, 2013, my italics).

*Special Collections Librarian, Library Services – Brayford ... Salary: From £25,504 per annum*

...This is a joint venture with Lincoln Cathedral Library

... In addition to the formal qualifications in the Person Specification, knowledge of cataloguing to ISAD standards and experience of either CALM or ADLIB cataloguing software would be an advantage, as would an interest in medieval history. (University of Lincoln, 2013, my italics).

*Metadata and Systems Librarian ... Salary (£) 30424-36298*

... Essential:

... In-depth knowledge and substantial practical experience of one or more of the library, museum, and

archive cataloguing standards currently in use at Durham University (AACR2, RDA, MARC21, EAD, Dublin Core, and Spectrum), along with an ability to apply underlying theory to develop an understanding of all these areas to the extent required by the post. (Durham University, 2013, my italics).

With employers like these seeking a level of familiarity with standards that is more than theoretical, it is easy to see why some students should wish to take a core cataloguing module that means they

have an understanding of the general principles of bibliographic description and the history of the development of cataloguing in the UK and USA; know how to apply the main international cataloguing rules to books; are aware of the structure of AACR2 and can describe some of the key differences in cataloguing non-book formats; have practical experience cataloguing using AACR2, RDA and the MARC21 cataloguing format; understand the basics of authority control and how it can be applied; are up-to-date with the latest developments in the new international standard, RDA; have written a cataloguing policy for a special library / subject area of their choice. (University College London Department of Information Studies, 2013).

As Bawden is kind enough to say in his overview of City's "principles and concepts" approach to instruction in Knowledge Organization, they "have another institution in London providing a very thorough treatment of these issues in its Masters courses" (Bawden, 2012). Indeed, as reflected in *Practical Cataloguing: AACR, RDA and MARC 21* (Welsh and Batley, 2012), at UCL I attempt to provide the conceptual knowledge one might expect of any Masters awarded from our institution as well as equipping students with the practical tools and training that the job market for cataloguers and bibliographic services managers requires. The MA LIS is, after all, a vocational Masters and cataloguing is, after all, a career choice that demands a long apprenticeship for which the Masters provides a firm foundation (Howard, 2011; Welsh, 2011).

The current challenge, therefore, is to provide students with the skills they need in the hybrid environment, during the transition from AACR2 to RDA and from MARC to the format proposed by the Bibliographic Frameworks Initiative (BIBFRAME) (Library of Congress, 2011-2013). Whereas in previous academic years it was appropriate to provide students with instruction in AACR2 in MARC and indicate where RDA differs, this year it is important to provide them with more hands-on learning about RDA.

### **The flipped classroom**

As discussed elsewhere (Welsh, 2011), the preferred mode of learning is active, with three hour sessions split into a short plenary followed by practical activities. Whereas in previous years we have been constrained by being based in standard classrooms, for the session 2013-14 we were given priority for computer cluster



bookings, justified by the need for regular use of the RDA Toolkit. Taking the practical classes into clusters has, in turn, enabled a variety of activities that were not possible before, and, in particular, it has allowed students to select from a range of activities, according to their level of previous experience, interests and learning objectives. In essence, it has been possible to flip the classroom, so that the learning that takes place during lecturer-student contact time is more focused on the needs of the individual.

As a teaching and learning concept, the flipped classroom has been gaining coverage in the academic press both for secondary and tertiary education. In essence, the provision of video and other online content enables students to undertake the passive learning that normally occurs in a classroom at home and to complete activities in class-time that previously were undertaken as homework. Based on the well-established theories of John Dewey that experience is the mediator of knowledge (Dewey, 1929) and that we learn best not merely through the performance of an educator at the front of a room but by undertaking activities independently of the educator, although with their appropriate support (Dewey, 1897), the flipped classroom provides a student-centred approach as opposed to a “one size fits all” approach to teaching (Michael, 2006).

As Charlotte Middleton points out, one of the challenges of the module both for teachers and students in the core Cataloguing module is the range of experience with which students arrive (Middleton, 2013). Whereas in previous years, those with experience had to wait for less experienced colleagues to gain enough knowledge to undertake the shared classroom activities (usually cataloguing a range of books of varying degree of difficulty, focusing on one particular field each week), in the flipped classroom each student can start from where they are and move forward to their own end goals for the module.

### **Flipping the cataloguing class**

Of course, all the students have at least one shared goal, which is to pass the module assessment. In order to do this, they must write a cataloguing policy, including example records varying from basic to more challenging (such as those containing conference headings and uniform titles):

With reference to AACR2 revised (2002 revision + amendments) and other appropriate standards (e.g. RDA, FRBR, standards for specific materials), create a cataloguing policy document for a library. (Welsh, 2013).

For a beginning cataloguer, who does not envision working in this area of the profession, passing the assignment may be their only stated learning objective. For someone who has, perhaps, chosen to attend UCL’s MA LIS course in order to increase their mastery of cataloguing theory and extend their experience, the list of learning objectives may be considerably longer. Certainly this year it has included students who want to move on from monograph cataloguing to maps and a small cluster of students already proficient in copy cataloguing printed music who wish to deepen their understanding of the theories underpinning AACR2 and

extend their cataloguing experience to RDA. As every year, there are also students who aim to become systems librarians and who are, therefore, keen to enhance their knowledge of discovery systems and, of course, the BIBFRAME Primer (Miller *et al.*, 2012).

The students have kindly agreed to help me evaluate the flipped activities and their experiences of flipped learning, and I will issue a survey questionnaire at the end of the term and request volunteers to be interviewed in order to add to the activities on offer and fine-tune any materials (videos, handouts, in-class instruction) ahead of the next academic year. However, from my own classroom observation and from verbal feedback from some members of the class, I have seen several positive impacts from flipping the practical classes:

1. As I look round the cluster room, I can see students engaged in different activities – watching videos, reading the RDA Toolkit, studying the catalogues of other libraries.
2. In the first 5 weeks when new cataloguers were mastering basic fields (Author, Title, Publisher, Physical Description), experienced cataloguers were able to move into viewing material on RDA and forming their own opinions about it and about how it is being applied by different institutions. There was enough time in class for me to have meaningful discussions with the more experienced students as well as to assist the beginning cataloguers.
3. By the third week of class, students had formed loose groups of people at much the same stage who like learning in the same style. The majority still follow the approach I took in my “one size fits all” model – working in groups of two or three to go through and discuss examples and the rules pertaining to them. However, those few students who are purely conceptual learners are ‘freed’ from this model to engage in activities best suited to them – one student in particular has made tremendous progress simply by reading AACR2 and the RDA Toolkit and the handouts I prepare in support, and then, having done so, began cataloguing examples. Although I am sure he would have learned under the “one size fits all” approach, the amount of material he could cover would have been restricted by waiting for the majority of the class to complete enough practice examples to understand concepts that he, clearly, can normally grasp through reading alone.
4. Questions brought to me outside class by individuals are, generally, more complex than in previous years. As the weeks have progressed, everyone’s learning has accelerated. At the same time I have noticed that the couple of students who need to move through the fields more slowly also seem to me to be more confident. I presume this is because they are able to work at their own pace, trying as many examples as they need before moving onto the next field.
5. From week 6 of the course, one of the core activities in which students have been engaged is drafting their policy document for their assessment. Following my advice, this has meant their finding examples from

the subject area they have chosen, bringing them to class and cataloguing them, while making note of issues that arise that they can discuss in their policy document. By cataloguing a range of items, they begin to develop a feel for the sort of issues that occur in, say, legal texts (lots of complex edition statements and added title entries, for example) while they are able to discuss with their neighbours the issues that are cropping up in their chosen area – perhaps art books (lots of physical description challenges, and perhaps, quite deliberate non-AACR2-compliant graphic design on the title page). I'm sure that this activity took place outside the classroom before, but by bringing it into the heart of our practical sessions, the students are able to involve me in the discussion, and, in turn, I am able to widen it out, where useful, to the class as a whole. On a more mundane level, students have gained 7.5 hours of time in class to work on something that previous years had to complete at home alone.

6. It is clear to me that my major objective – that students should be free to learn AACR2 in MARC but have the opportunity to engage with RDA at a level appropriate to them – has been achieved. As one of the self-defined “absolute beginners” put it, “As long as I know the stuff is on Moodle and I can come and ask you questions once the course has finished, I know I can concentrate on my policy document and then really get to grips with RDA.” In this, she was doing herself a small disservice, as she is one of the students who, in general class feedback sessions, seems most accurate in her observations of the specific differences between RDA and AACR2.

Picking up on this final point, this is the gain in teaching and learning that I did not predict when I decided to flip the class. I think we have, perhaps, been too hasty in assuming that having to learn two standards ‘at once’ will be too great a cognitive load for beginning cataloguers. At a field by field level, all of this year’s students have been able to engage with RDA. As one of them put it to me when I asked her about this, “It’s easy to understand from your videos ‘At the moment we do this, but when we work in RDA we will do this other, different thing,’ what’s harder is to understand two different models, so I’m focusing on learning the AACR2 one and then I’ll really get to grips with FRBR and RDA in the new year, in my own time, because I’m interested. For now, I’m just floating along with the FRBR and RDA basics you’ve covered in lectures.”

One of the questions I have for the students in my survey and interviews will be about the utility of lectures. I’m keen to discover if their experience was similar to that of the students Strayer studied in his work, which looked at Statistics classes, and found that for introductory material, students actually preferred lectures to either sitting watching a video at home or engaging in interactive activities. For those students, if they were learning something entirely new, it was preferable to be led from the front of the classroom by an instructor who could not only assure them of the authority of the information but provide a subtle feedback loop in which the students felt confident that they had gained some knowledge of the subject at hand (Strayer, 2012).

In moving forward to the next academic year, I am extremely grateful to the class of 2013-14. As well as giving

me suggestions for the topics for more videos that they would find useful, going through the process of delivering the flipped classroom with them is helping me to learn which aspects of RDA are proving most challenging to students at different levels of pre-library school cataloguing experience. This, in turn, is invaluable as I prepare for next year, in which, for the first time, I will teach RDA as the main standard and the standard on which students are assessed (although, of course, still covering AACR2, as a second standard it is important for students to learn). Employers can rest assured that UCL will continue to prepare students for the hybrid environment in which we all operate, and that students are not only capable of surviving in that environment, but keen and, in most cases, able to shape it. As a cataloguer of a certain age, who is herself learning to swim in the new waters of BIBFRAME, I feel very reassured by the next generation with whom it is my great privilege to work<sup>1</sup>.

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## The experiences of a new cataloguer

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It is an exciting and challenging time to be learning cataloguing. The cataloguing world is undergoing a massive upheaval. However, the transition to RDA, although still incredibly new, is clearer than it was this time last year. Being a first time learner in this environment has both advantages and disadvantages: on one hand learning RDA is not a matter of unlearning habits for my peers and me. However, it is a case of attempting to learn two sets of, often conflicting, rules at the same time. The UCL course focuses on both AACR2 and RCA, teaching both standards in tandem.

The course began with an exploration of the history of cataloguing which I found extremely helpful. Although I have a small amount of cataloguing experience from my training year the lectures on the history of cataloguing helped me to understand far better how we have come to this point and where we may be going from here. It helped me to understand that AACR2 and RDA come from two completely different intellectual models, where before I had assumed that they merely had slightly different ways of doing things.

One challenge with learning cataloguing is that everyone arrives at UCL with dramatically varying experience of cataloguing. Some of my peers spent much of their compulsory training years cataloguing, and are quite used to cataloguing all manner of unusual things, and others have already had extensive training. In contrast, some of my classmates, whose training years were perhaps more orientated on front-of-house activities, had no cataloguing experience at all. I, and many other students, occupy a middle-ground where we are relatively inexperienced but do have some understanding and experience of cataloguing.

As part of my training year as the SCONUL trainee at the University of Surrey Library I was given the opportunity to learn to create and edit catalogue records according to the rules taught to me by the cataloguers. At that point I did not fully understand what AACR2 was or how it applied to the records which I was making. In this way I learned the practice before I had learned the theory, for which I was thankful. It meant that when I was confronted with the theory upon starting the course at UCL I did not find it too vast and daunting but could immediately apply it to the records I had learned to make at Surrey.

I was also fortunate since it was during my traineeship that I first encountered RDA. The cataloguing department at the University of Surrey Library were enthusiastic and exciting about implementing the new cataloguing rules. It was only after I had finished my year at Surrey that I learned about the controversy surrounding the new standards. I think that I might have found this very daunting had I not previously worked on new RDA records with the team at Surrey<sup>1</sup>.

<sup>1</sup> Emma Hallett, cataloguer at the University of Surrey, describes the process of the introduction of RDA at Surrey in this issue of *Catalogue & Index*.

Anne Welsh has devised an excellent way of combating the issue of the variety in skill of her cataloguing students: the flipped classroom.

This means that the first hour of the class consists of a lecture and in the other hour and a half of the taught session in which the students dictate their own work – choosing from a range of handouts, videos and links to external resources to practise different aspects of cataloguing. The combination of theoretical learning and practical works very well since we can immediately apply the theory which we have learned which makes it easier to understand. This also reflects the importance of both theory and practice in cataloguing. The combination of theory and practice also suits both passive and active learners.

In the flipped classroom sessions we are given various options: from watching *how to* videos and practising making records to learning more about AACR2, RDA or MARC21 and using the RDA Toolkit. This approach means that students who had a lot of experience with cataloguing during their training can investigate areas which interest them but are not covered by the plenaries in the course: for example one of my classmates is looking into the rules regarding cataloguing maps. Meanwhile, my peers who have little or no experience cataloguing can read through rules and practice making records for books. As well as having the opportunity to ask Anne more specific questions.

This arrangement also means that students can help one another: some of the more experienced students enjoy helping their classmates during flipped classroom sessions and both parties come to a greater understanding through this process. There is also a somewhat of a feeling of camaraderie during these sessions, which reflects the attitude of the course as a whole.

The world of cataloguing is in the process of undergoing monumental changes and cataloguers will need to change and adapt with them. The course at UCL recognises those changes and is changing its cataloguing course accordingly.



#### Who we are

The University of Surrey has one main Library & Learning Centre, within which the Cataloguing & Metadata Team reside. As one small section of the larger E-strategy and Resources Team, our core team of three are: the Team Leader, an Information Resources Advisor and a Cataloguing & Metadata Officer (me!). It could be said therefore that the implementation of RDA at the University of Surrey has been a venture on perhaps a more benign level compared to that of many larger institutions. It has nevertheless been a successful project that has enabled us to begin to understand more fully what we are attempting to do and how we do it, with the necessary consequence of re-assessing our workflows and procedures in order to manipulate them for the benefit of both the team and our end users.

#### What we do

Using Capita (formerly Talis), the majority of our bibliographic records are imported as part of the EDI Cataloguing Services, and a large proportion of material arrives shelf-ready. We go through reports daily to assess whether an item needs to be seen by a cataloguer once it arrives physically at the Library; if a record is “Full” (as stated in the encoding level within the Leader) and a satisfactory classmark is present (Dewey 22 or 23 or as chosen by the Academic Liaison Librarian) an item can be shelved straight away upon receipt. If the Leader encoding level is not “Full”, or if no record is available for import, it is noted on the order record that the item needs to be passed to Cataloguing so the record can be edited accordingly. By using this method, we still see a lot of what is ordered (since adopting EDI in May 2012, out of approximately 6300 items ordered, 2392 of those items have had to come to Cataloguing) but we feel we can maintain a high level of quality and accuracy this way.

#### Our road to RDA

Our road to RDA implementation began in earnest in 2010 with my attendance at the first of the CILIP RDA Executive Briefings on 30<sup>th</sup> March, back when the idea of RDA was very much “well, that is of course if it *is* adopted, who knows?” Positive commitment from senior management in the Library from the very beginning meant the RDA Toolkit was signed up to as soon as it was available for trial and we have been lucky to have kept the subscription ever since. A year on from that was the second CILIP RDA briefing in April 2011. Our confidence was built by hearing from Terry Willan (from Talis/Capita) at this briefing, presenting on what Capita had done and were hoping to do with reference to RDA being implemented, showing that our LMS supplier were taking the new standard seriously and were actively preparing for it. In the same month the Cataloguing & Indexing Group ran their first e-forum on RDA, which was great for garnering what others thought of it and what, if anything, they were doing to prepare for it. 2012 brought a flurry of all things RDA: the third CILIP RDA

Executive Briefing in June, the CILIP CIG conference in September, which held an RDA update, and a FRBR for the terrified course (which proved essential as it was something we just could not “get” from reading about it alone). To prepare for the 31<sup>st</sup> March 2013, along with attending every course, webinar, e-forum, and email discussion with the word RDA in it, we were attempting to learn as much as we could about how to catalogue a book in MARC. It gave us a starting point in which to begin learning RDA, making it feel less intimidating overall. This was facilitated greatly by the second of CIG’s e-forums on practical RDA cataloguing in October 2012. It wasn’t really until this two day event that we actually used RDA in any practical sense and the whole thing proved to be both enlightening and reassuring – much to our astonishment, we appeared to be cataloguing in a similar way to others and probably knew more than we originally thought.

So, all this, along with reading around the subject online, getting involved with email discussions (RDA-L list), and becoming more and more familiar with the additional tags in MARC, and we were as ready as we could be for 31<sup>st</sup> March 2013.

## **Implementing RDA**

It was useful, in the early days of RDA adoption, that Arlis held an RDA implementation workshop (in April 2013), which thankfully backed up the way we were beginning to do things. So, how did we put RDA into practice?

It helped that we have a small team. In practice this meant that one of us (me) was tasked with following all RDA developments and subsequently “learning” RDA in order to cascade this to the rest of the team. The fact that the other Cataloguer was a new member of the team and hadn’t long qualified (& having been introduced to RDA at UCL) meant this was actually rather easy to do! In the beginning, an invaluable tool was the MARC to RDA mapping within the Toolkit, along with the global workflows posted there. The British Library Monograph WEMI workflow was probably our most used one at that time and continues to be extremely useful. These small things within the Toolkit gave a starting point to begin to explore further, and made exploration of the Toolkit, which can be confusing at the best of times, more manageable.

We started with the premise that we would adopt RDA in its entirety; we had no pre-set agenda to change it in any way to suit our purposes. This meant we were ready and willing to accept, among other things, the stripping out of GMDs in tag 245, and replacing these with the 33Xs, that we would add relationship designators to 100s and (multiple) 700s, and that we would add a second 264 (second indicator 4) for copyright date. This meant that the full RDA records we were importing (from the Capita database, TalisBase 2) would not have to be altered in any way. These records come from a variety of different institutions but the ones we tend to choose come from Bibliographic Data Services (BDS), the British Library and the Library of Congress, three of the fore-runners of RDA adoption. Much of what we were receiving via TalisBase then were RDA records already and were a really good starting point; we printed some of these out to put in a

reference folder which we could call upon as needed. I created a simple cheat sheet detailing what elements should be in a record (downloaded or created by us) in order for it to be accepted as an RDA record and enabling those imported records encoded as Full to still by-pass Cataloguing once receipted. (As an aside, we do still accept non-RDA records if they are Full with our rule being that everything that comes physically to the team will be catalogued to RDA standards). So, with this document in hand, with our examples at the ready, and the Toolkit on standby, we felt confident to catalogue books to RDA using MARC. As this continued for a while, we also became more confident in using that wonderful thing “Cataloguer’s judgement”. For example, we are happy to shorten Publishers’ names down so what could read as “Anthem Press, an imprint of Wimbledon Publishing Company”, we would put as “Anthem Press”; or if there were 100 authors, we would have a think as to what would represent those 100 authors in the best way in the record, both for our sakes and for the users!

Once we felt confident in our book cataloguing, we began to look at other types of materials. We have always used templates and set examples for cataloguing theses, AV material, scores, ebooks and CD-ROMs. This is to both facilitate teaching new members of staff and to enable Resources Assistants to undertake the cataloguing of these items. The obvious next step was to edit these examples to incorporate the RDA elements. We did this by looking at, and printing out for reference, the many examples provided by the Library of Congress (PCC SCT RDA Record Examples) and the Toolkit, in particular to familiarise ourselves with the varying 33Xs and the relationship designators. Editing the existing templates was relatively straightforward – all the information already existed “out there”, it was just a matter of pulling it all together to create our own manual.

We tested all of these set examples thoroughly to check they displayed correctly, both in our OPAC (Prism 3) and in our discovery layer (Summon). We didn’t encounter any major problems with display – we upgraded to Prism 3 in May 2011 which had already stripped out the display of GMDs within the title for a more subtle display of item type beneath the title information. We did however note a small problem of terms used in RDA for extent description (MARC tag 300, subfield a), in particular the use of “audio disc” for “compact disc”. By using “audio disc”, the item type displayed as “Unknown” in Prism; we have therefore made it local policy to use “compact disc”. Not only does it then display as “Compact disc”, it is actually a more suitable term for our users. CD-ROM proved a similar issue – we opt for “CD-ROM”, rather than “computer disc”, again to generate a correct display. This is of course something that is “allowed” in RDA. We also encountered a slight problem with tag 264, second indicators 1 (Publisher) and 2 (Distributor). At first we thought adding both of these would be useful for DVDs as such information is usually readily available on the container. Prism however, chooses to display Distributor details only if given, with the Publisher not appearing at all. We made a conscious decision therefore to only input Publisher details. Once all these finer details had been sorted, we began to catalogue all other types of material to RDA standards.

In terms of our OPAC, I am unaware if anything different has been noted by our users – I’m inclined to think

not. Other than abbreviations written out and relationship designators showing, there is probably little to catch the user's eye - all our lovely new 33Xs do not as yet appear in Prism (and to be honest I'm not sure of their current worth as they stand to our users anyway). To this end however, we held a training session for other Library staff as to what changes might be noticeable in Prism, which we felt was of particular use for front of house staff and Academic Liaison Librarians, as well as our colleagues in the Resources team.

### **Good things, bad things, lessons learnt**

Firstly, we were fortunate: we had buy-in from senior management, our LMS supplier had RDA in their sights long before we did, we had access to the Toolkit throughout, and money in the budget to pay for training courses. This gave us a firm base (and no excuse!) for then going forth to learn everything we could.

Our current way of doing things, that is, having a manual of how to catalogue differing types of material, lent itself well to being revised and updated to incorporate RDA. These were a good place to start and through editing and refining them, and then testing them out, we managed to highlight issues (both good and not so good) concerning Prism and Summon display.

The outside cataloguing community were invaluable. Through training events and email forums, hearing others' experiences, what they were doing and what was or wasn't working – all were key to being confident in making our own decisions.

However, on the more negative side, what perhaps has gotten lost in our way of doing things is the very essence of RDA, that is, RDA as a stand-alone, goes-with-anything, content standard. Everything we have done, and how we have viewed it, is via MARC. Which is great, for our current purposes, but as we use "our" manual we quickly forget how the Toolkit actually works, and where FRBR comes in to it all. Following the appointment of a new Head of E-Strategy and Resources the whole area of schemas and metadata collation is currently under review, so purely from a personal perspective, I would like to question where RDA could take us and where else it could be used – in our academic repository, our archive databases (Calm), both of which are non-MARC? Would this create more unity amongst our metadata... or just more work for little benefit?

You may also notice I haven't mentioned Authority control. This is something rather overlooked as a whole at Surrey, with the general rule being we do what we can with limited staffing resources. So here too is a whole area not previously looked at with regard to RDA. With a UK NACO funnel perhaps being a possibility in the future, it's certainly an area I'd like to see developed.

Lastly we have yet to look at the possibility of retrospectively editing all our pre-existing records. It would be good to think that one day we may turn our attention to this, or least to certain elements, for example, stripping out GMDs and replacing them with the relevant 33X tags.

So what have we learnt in the last seven months? That the cataloguing community, as ever, is great at sharing information, answering questions and generally being a supportive bunch; that change is not only possible but is actually quite fun, opening opportunities for networking and for learning more about what we do on a daily basis, and viewing that through our users eyes; that the implementation of RDA needn't be a daunting task – the help, advice, examples, they're all out there already; and lastly, that you know RDA is well and truly embedded when an AACR2 record looks, well, just a little bit wrong!

## **A. Cataloguing Department: Background information**

### **A1. Staff**

At Bristol University cataloguing is done by 13 members of the cataloguing team (some of whom have other roles), and by a member of the Relegation team, and one librarian from Special Collections. Four of these have no fixed cataloguing time, and the rest are equivalent to 4.5 FTE, and comprise 1 Senior Assistant Librarian, 5 Assistant Librarians (1.5 FTE), and currently 4 Senior Library Assistants (2.5 FTE), but normally 5 SLA (3.5 FTE).

### **A2. Library Management System**

The Library used originally LIBERTAS, and UKMARC, and then migrated to Aleph and MARC21. In the transition, certain decisions were taken which will inevitably affect the full RDA implementation (particularly with serials' records).

### **A3. Library Catalogue**

The catalogue holds (as of Nov. 27 2013) 885434 records. Of these 841612 have the catalogue record format books (including 11976 ebooks), 4670 visual materials, 584 cartographic materials, 11962 music, 26320 serials and 286 computer files.

Over the last three years 57106 new records have been added to the system: (Nov. 2010- Oct. 2011: 19626, Nov. 2011-Oct. 2012: 20449, and Nov. 2012 – Oct. 2013: 17031).

The Library acquires individual records from COPAC or OCLC, while some ebook records are added to the system as batch cataloguing records, such as those of Oxford Scholarship Online.

The library has also about 37000 authority records some of which match the LC authority headings.

## **B. History**

### **B1. RDA planning group**

The cataloguing staff was first informed of RDA at a brief training session in 2012 after which an RDA planning group of 7 members led by the Head cataloguer was set up. The group met 4 times over a period of 9 months. It set a plan of action which included: 1) Initial familiarisation of its members with RDA and FRBR, 2) Informing

Senior Management about RDA and its financial implications, 3) Informing the Systems Support Team of the changes needed to MARC21 and the Cataloguing client (Aleph) to accommodate RDA.

No. 1 was achieved (1.1) by creating an RDA filestore with relevant documentation and training materials, which originally came from Adam Schiff's website and from the LC, (1.2) by watching relevant webinars, and (1.3) by sending a delegate to the FRBR for the terrified course in Bath and cascading this training.

No. 2 resulted in securing the purchase of an RDA toolkit licence for 8 people.

No. 3 was tackled by creating test records and checking the display of the new and changed MARC21 fields, but the changes to Aleph could only be made after upgrading to version 20, as the previous version was not compatible with RDA. This upgrade took place in August 2013.

## **B2. Secondment (June-July 2013)**

In early June (and for two months) a member of the cataloguing team was asked to deputise for the Head of cataloguing in promoting implementation. By this time BL, and Cambridge and Oxford University Libraries had started adopting RDA and the documentation and training materials of the first two had been added to the RDA toolkit. As Bristol is a UK academic library a decision was taken to adhere to the practices of these libraries.

The study of the materials from these libraries led to the identification of issues requiring a local policy decision.

Attendance at an RDA meeting established links with members of the above libraries and secured RDA documentation from Oxford University Library.

With the aid of the Systems Support Team the indexes and tables held in Aleph were updated and the current application of MARC21 was reviewed.

## **B3. From August to November 2013**

After the upgrade to Aleph 20, RDA acquisitions records were accepted in the catalogue as test records to be catalogued by the delegated member of the cataloguing staff. This was thought necessary to enable local policies to be refined.

RDA templates for monographs and ebooks were created, as these are the two areas where RDA will be first adopted. Various fixes in and additions to the Aleph client were added, thanks to the help from systems staff of Oxford University. These perform, either automatic changes of AACR2 to RDA records, or enable cataloguers and acquisitions staff to choose the fullest RDA records for downloading.

## Local policies

Following test RDA cataloguing and further detailed study of the Cambridge training materials and the available Oxford documentation local policy decisions were made at a meeting of the cataloguing staff. In deciding the local policies account was taken of:

1. The practices followed by other UK Libraries. (We tried to follow as much as possible the BL, Cambridge and Oxford)
2. The size and purpose of the University of Bristol library catalogue (e.g. as a medium sized academic library it was decided not to add the fields for target audience or illustrations in children's books in original cataloguing)
3. The available cataloguing staff
4. The existing cataloguing practices
5. The available levels of Aleph support for RDA, and
6. Local implementation of MARC21

A summary of those policies in which RDA in Bristol will differ from that in Cambridge is cited below in the order of the MARC21 fields:

- 1) As a general rule Bristol does not and will not use first and final subfields with numeric codes (e.g. 264 #1 \$3 and 264 31 \$3, 336, 337, and 337 \$3, 490 \$3, and 590 \$5)
- 2) 008/22 intended target audience. Accept but do not add. See also 521
- 3) Use 245 10 (for title main entry) instead of 245 00 (necessitated for historic reasons)
- 4) 245 xx \$c. Add names in statement of responsibility and access points up to 9 individuals. Only add more than 9 if they are important enough to warrant the time spent doing it and checking them
- 5) 245 xx \$c. "Generally do not abridge a statement of responsibility" (LC-PCC PS 2.4.1.4), but do not add missing elements if not in imported records
- 6) 246 1 Variant titles. Use only 246 3  
e.g. no use of 246 1# \$i Minor title change: \$a Journal of..., but 246 3 \$a Journal of... + 500 note for type of variant title
- 7) No use of 247 (earlier title proper )



e.g. no use of 247 10 \$a, but 500 note instead

8) 300 \$b Recording colour of still images. Accept in incoming records, but do not add

9) 336, 337, 338 \$b. Accept in imported records but do not add.

10) More than one series in a multipart monograph. Instead of 490 1# \$3 and \$a, follow Oxford and omit \$3, do not make a 490 for a series (if only some parts of the resource are in it), add a 500 note, but include an 8XX access point for this series). E.g. for a 9-part monograph:

490 1 \$aTravellers' tales ;\$vvolumes 3, 7, 28, 30-34

500 \$aPart 4 is in the Oxbridge Anatolia paperbacks series.

830 0 \$aTravellers' tales (Oxbridge (Firm)) ;\$vvolumes 3, 7, 28, 30-34.

830 0 \$aOxbridge Anatolia paperbacks.

11) ISSN in series and sub-series statements. If found in derived records retain in 490, but delete in 830

12) Thesis (502). Use only \$a with information in the order: Thesis (M.A.) – University of Liverpool, 2013, and not as e.g.:

502 \$bPh.D.\$cUniversity of York\$d2010

13) 504 Supplementary content for bibliography and index. Accept in incoming records but do not add

14) Unformatted contents note (505). Discretionary, but essential for compilations and multipart works

15) Formatted contents note (505). Up to 12 elements accept in derived records, but check and convert to non-formatted note. More than 12 delete

16) 520 Summary note. Delete from derived records if present

17) 521 Target audience note and 008/22. Accept but do not add

18) Linking entry fields 76X-78X. Not supported by Aleph. Delete if found in derived records. Information (showing the relationship with another work) can be included in an unstructured 500 note

19) 856 Uniform Resource Locator. Use only in e-books; delete from other records

### **C. Way forward**

1. Roll out a training programme (Jan.-Feb. 2014)
2. Adopt RDA for print monographs and ebooks in the first instance, and then move to other forms; exclude cataloguing of serials (limited in amount and historically not compatible with MARC21)
3. Accept RDA derived records (ongoing)
4. Accept full AACR2 records from trusted sources (e.g. LoC or BNB) and keep them (ongoing)
5. Convert to RDA any derived AACR2 records when needing substantial editing (March 2014)
6. Conduct original cataloguing to RDA standards (March 2014)

#### The OLIS scene

Oxford University's OLIS community (Oxford Libraries Information System) implemented RDA at the same time as the Library of Congress and the British Library, but we had to do it in a very different way.

OLIS is a shared Aleph database, administered and supported from the Bodleian Library, but with about 200 contributing cataloguers in about 100 libraries. Half of these libraries, mainly in colleges and departments, are not part of the Bodleian group. Some have only one or two staff, who spend a small fraction of their time on cataloguing and cannot easily take time out for training. To support all OLIS cataloguers on standards and policy issues, the Bodleian has just one trainer/adviser; and the Bodleian's two training rooms are a couple of miles away from most of the libraries and in great demand. We therefore had to design transfer training to make the best possible use of the shortest possible contact time and to enable cataloguers to help themselves and each other thereafter with minimal specialised support. Although the Bodleian is entitled to a reasonable level of cooperation from all OLIS libraries, the success of any large and demanding OLIS-wide undertaking depends on the goodwill of all our OLIS colleagues and their readiness to meet us at least half way.

So why did we, with our numerous, scattered cataloguers and limited resources, decide to implement RDA so early? Basically because the Bodleian, being a Legal Deposit Library, receives about 170,000 items to be catalogued every year and cannot afford to do a great deal of original cataloguing. We depend heavily on copying records from the Library of Congress and the British Library, many of which are cataloguing-in-publication records, excellent as far as they go but in need of updates and further detail. Once LC and BL started to create their CIP records in RDA, we had to have RDA-trained cataloguers to upgrade them. We do not have the resources to support two cataloguing standards for long, so (almost) everyone had to move to RDA at the same time.

The fixed point for our planning was Sunday 31 March 2013, or perhaps really the following day, April Fools' Day. 31 March happened to be the Day One chosen by LC and BL, but for us it was determined mainly by the need to make best use of the Easter vacation, when both people and training rooms would be more easily available. Because it was essential to be ready by this date, it (somehow) had to be possible.

#### Training and documentation: finding our level

Proponents of RDA tend to emphasise the importance to cataloguers of a really good grasp of FRBR and familiarity with the RDA Toolkit. But that is a lot to ask of people who catalogue only occasionally, and we decided that in the short term it was not really essential. We expect to be cataloguing in MARC for many years to come, so we adopted a task-oriented approach, based on MARC record structure rather than FRBR entities. We designed our new documentation to be almost free-standing, so that cataloguers would need to use the

Toolkit only for points of detail such as definitions of relators or capitalisation of Finnish state-run economic institutions, and we decided not to mount it within the Toolkit so that it would be easily accessible and could be updated quickly. (We could not anyway have afforded to pay for 200 people to spend serious time in the Toolkit.) We included just enough about FRBR and RDA structure to enable cataloguers to understand RDA terminology, navigate the Toolkit when really necessary, and have some appreciation of what FRBR is designed to achieve.<sup>1</sup>

This was a good opportunity to rethink our training and documentation overall. We wanted to integrate theory and practice more closely, so that participants would be able to perform simple cataloguing tasks fairly early in their training, and we wanted a single set of documentation to serve both for training new cataloguers and for general reference, so that it could be kept up to date more easily - a key consideration, given the constant developments in RDA.

Transfer training for existing cataloguers took the form of a one-day classroom course (presented 14 times in all, with up to 18 people at each), a set of brief documents and a practice pack. The presentation served mainly to introduce the key points of each document (RDA & FRBR; RDA Toolkit; changes in transcription etc.; changes of structure; whether and how to convert AACR2 records to RDA) but also included a 'workshop' where participants, in small groups, created parts of bibliographic records, trying to apply RDA principles for themselves and find their way around the documents. Some things proved quite easy to accept, such as always having the first creator as main entry and using simple relators; but others proved harder, such as transcribing all six authors of an academic work and making access points for them. Worst of all were (and are) the complexities of 'Is it a new work or just a new expression?', particularly for new editions which have changes in the creative team.

It was a pretty tough day, but participants generally made the best of it. A few would have preferred to have sessions spread out over a longer period, but most were glad to minimise disruption and travel time and get the worst over quickly. They appreciated having a clear programme for the day, with breaks on schedule, and were quick to seize on any light relief which RDA could offer.<sup>2</sup>

After the course participants were asked to read through the transfer documentation carefully, work through the practice pack, raise any queries, and then get on with their ordinary work, in RDA. We encouraged cataloguers who worked together to train together, so that they could support each other, and we asked everyone not to

- 1 For people who wanted to know a bit more, there were optional presentations on FRBR and the Toolkit a few months before implementation.
- 2 More than you might think. Everyone loves RDA sections 4 and 7, the ones which have not been written yet. And for an example to practice using a separate analytical entry for each language-version of a multilingual text, how about the English/Portuguese children's book Flash, bang, wheee! = Flashe bum uiiiiii!

revert to AACR2 after the course, even for the few days before Day One (although it seems that quite a few did, and we did not try to police this). A few weeks later my colleague Elena Estraiikh provided an extra course for serials cataloguers.

## **Infrastructure**

There was far, far more to implementing RDA than re-training bibliographic cataloguers.

### *Systems*

Our library system had to be re-configured for the new MARC elements. This went far beyond just making the new elements valid. Indexes were redefined and new ones created,<sup>3</sup> pick-lists were made for elements with controlled vocabularies, fixes were created to help with conversion by automatically adding or replacing various elements, MARC 21 help files were updated, and, not least, public displays were reconfigured to make use of RDA data, particularly 264 fields. We also compensated for the absence of AACR2 data by generating a quasi-GMD, partly from 33X data, on export to SOLO (our resource discovery platform), so that public users see much the same display whether the underlying record is AACR2 or RDA. In the longer term we will probably generate 33X fields in our AACR2 records, but there is no point in doing this until we have a public-facing system which can make more granular use of 33X.

We were particularly fortunate to have in Nathalie Schulz an Aleph systems expert who is also a very experienced cataloguer and had been secretary to the JSC for RDA for many years. Nathalie was particularly ingenious in devising Aleph tools to ease some of the more tedious and tiresome tasks associated with RDA, such as fixes for AACR2-RDA conversion and pick-lists for relator terms. They not only save time but also provided a great psychological boost when we implemented, a little bit of magic.

### *NACO*

The demands on our 11 NACO cataloguers were actually much heavier and more urgent than those on our bibliographic cataloguers. Because NACO accreditation is in the hands of the Program for Cooperative Cataloguing, there could be no local policies or 'lite' versions or partial or late implementation. Our NACO cataloguers took the PCC online course (several days' work) and then had a long period of intensive review from an approved agency. In this we again had invaluable support from the British Library, who gave two of our cataloguers an early start by allowing them to share their inhouse training, reviewed our first wave of RDA/NACO cataloguers, and then signed us off so that our second wave could be reviewed largely inhouse. Paul Frank of PCC was also very accommodating about scheduling our slots for online training.

3. We are very grateful to BL for sharing their Aleph configuration decisions.

Our series and serials specialists had to take additional external training for series authority work and for serials cataloguing.

Because of the changes in the rules for NACO access points, our Bibliographic Maintenance and Authority Control team (BMAC) and systems staff had to load a vast number of revised authority records; and because not all the changes were 1:1 substitutions, this also meant a huge amount of cleanup in bibliographic records and some difficult decisions about how much could be done. Perhaps the most awkward changes to manage were the replacement of AACR2 access points with 'Polyglot' or two languages in subfield \$I (e.g. \$aHomer.\$Illiad.\$IEnglish & Greek) by separate access points for each language-version.

### *Maintaining throughput*

Inevitably, a mixed AACR2/RDA environment makes more work than a predominantly single-standard environment. Before implementation most<sup>4</sup> OLIS cataloguers were allowed to download only those RDA records which could be trusted to require virtually no editing (BNB or LC full-level records), and that meant more original cataloguing. After implementation they were allowed to download only trusted AACR2 records (BNB or LC, full-level, post-2005) without conversion. All others had to be converted to RDA before checking and editing, which again made extra work. We later eased this restriction for some groups of cataloguers who were working in areas where RDA records were seldom available for download (e.g. the Bodleian's backlog of non-academic materials) and who were doing enough cataloguing to keep in practice for AACR2. We cannot expect our cataloguers to maintain skills in two standards for very long, but the need for AACR2 should decrease once most pre-2013 materials have gone through.

Another problem has been that every agency's output drops while it is implementing RDA, which meant a net drop this year in records available for download from major agencies, whether RDA or AACR2. Specialists in art and some foreign languages suggest a drop of about 50% in their areas, but this probably is not all due to RDA.

The demands of NACO cataloguing have increased sharply, both because RDA records typically have more access points and because NACO records can now include much more detail about each entity than is required just for identification. This is more satisfying, because it was frustrating for NACO cataloguers to be forbidden to record useful and interesting research except as notes, but the amount of work can be alarming and sometimes competes for time with bibliographic cataloguing and with other BMAC work.

Most OLIS cataloguers did get up to speed with RDA fairly quickly. The worst snarl-ups in bibliographic

4. One cataloguer had early RDA training so that she could deal with the small number of RDA CIPs we encountered.

cataloguing arose from RDA's flexibility about how many statements of responsibility and access points to include, aggravated by the need to assign appropriate relators where possible. Initially we encouraged generosity but avoided issuing detailed guidelines, partly because we wanted to keep transfer documentation free from finicky detail and partly because only experience could tell us what kinds of situation (if any) would need something more than 'cataloguer's judgment'. After a couple of months we did have to create guidelines. These were welcomed and seem to have made things appreciably better. Again, specialists in art and foreign materials were disproportionately affected: art because so many art-related works include numerous valuable essays, interviews, insights and responses by different people; foreign-language material because it is so much harder to identify and evaluate statements of responsibility when they are in Albanian.

Overall, throughput issues have often been worrying but never disastrous. However, we were perhaps unprepared for the extent to which this issue affected people as well as statistics. Cataloguers inevitably feel rather fragile when adjusting to a new standard. Having so much left to their judgment, seeing a great variety of practice in downloaded records, and lacking a framework of experience and approved models, many people tended to agonise, afraid to omit anything but horrified by how much extra time they were spending per resource. It was essential to reassure them that their sense of which entities and roles are important and interesting for readers, although acquired in AACR2, reflected the FRBR user tasks and was still applicable to RDA records.

### *Workflows for non-cataloguers*

Most of our materials have had quite a lot of processing from acquisitions staff or paraprofessionals before they meet their first fully-trained cataloguer. When downloading, these staff needed guidelines for selection, taking into account whether AACR2 or RDA was currently preferred; when creating brief records, they had to know about changes to transcription rules (e.g. abbreviations) and get used to 264 and 33X fields. These needs were covered by documentation, because there was no time to run separate courses for non-cataloguers. But the documentation about downloading had to change at least three times in the year before Day One, as relative availability of AACR2 and RDA records shifted (and also because we had to develop a policy on use and conversion of foreign-language records - other things do not stop happening just because we want to focus on RDA), and this was probably an uncomfortable period for the people involved.

Our AACR2-RDA conversion fix is fine for use by non-cataloguers, because it adds a local field with a strident warning that the record needs to be checked further for RDA compliance. Only when a cataloguer has made the checks and removed the local field will the record be exported to RLUK and WorldCat.

### **Upsides, downsides**

Our rush to RDA probably worked to our advantage in most ways. Rather than living with the fear of the

unknown and with a succession of tiresome bodes for the mixed and shifting AACR2/RDA environment, our cataloguers could get to grips quickly with the realities of RDA and adjust to settled workflows for which they were properly skilled. And the people closely involved in implementation could at least see a prospect of life after implementation, when it would become possible to take leave again.


One downside was that we could only implement for modern books, serials and printed music<sup>5</sup> in the short term. Books and serials were the priorities because they are still the vast bulk of our intake and are the materials for which we can most often find good external records. But cataloguers dealing with books with substantial non-book accompanying material are still having to make do with rather sketchy documentation for the non-book 33X and 34X fields, although we are gradually developing detailed documentation for each type of material (DVDs and Atlases so far, with Sound Recordings in preparation).

Another downside was that it was a high-risk strategy. We had no additional staff for RDA and, apart from cancelling the autumn 2012 set of cataloguing courses (too late for AACR2, too early for RDA), we were doing all our normal work. Plenty of non-RDA stuff happened and had to be attended to. We were working at our limits, with little overlap of roles, and there was no Plan B in case a key person was unavoidably absent.

A further downside was that our preparations were made while RDA and its interpretations were still very much under development. There were plenty of shocks and confusions on the way. What was written had to be rewritten over and over, even after training had started, and could not be adequately checked before use.<sup>6</sup>

Because policies and documentation were never quite finalised, they were not shared and discussed as widely as we had hoped. Our implementation was managed by a small group: Alison Felstead, Head of Resource Description; Nathalie Schulz for systems; Alasdair Macdonald and Stephen Arnold for NACO training and other BMAC work; Rebecca Alexander, one of our first two RDA cataloguers, who gave feedback on the draft training material, dealt with RDA CIPs before implementation and acted as a mentor during the training period; and myself as trainer/advisor for cataloguing standards. We met frequently and worked closely together, but no one other than myself had serious time to spend reading RDA itself and related documents, so our grip of RDA was less balanced and comprehensive than it might have been. Alison also set up a broader implementation group, representing a range of OLIS libraries and specialities, but we did not have time to use their expertise very much before implementation or to get their opinions on the training plans and documents. In the wider context, OLIS and various other agencies had planned to make their draft training materials available to each other in good time but did not actually have usable drafts until shortly before implementation. Nevertheless, seeing

5. The British Library very kindly shared their music training course with our music specialists, enabling us to implement early for this speciality.
6. And it goes on. At the time of writing, nearly 20 documents have just had to be updated because every ISBN example now needs subfield \$q for its qualifiers rather than parentheses.



other agencies' materials was of immense value, often exposing gaps in our own thinking.

Which brings me on to the really big upside of the whole experience, the cooperation and support between different cataloguing agencies, often under the aegis of CILIP CIG. Memorable events included an informal discussion at LSE in July 2012 and the CIG e-forum in October 2012, both of which fostered a sense of community and opened conversations, particularly with Cambridge University Library, whose willingness to discuss and advise has been invaluable to us. More recently, we have welcomed at Oxford visitors from a number of agencies who are planning their own implementation, and I met others at the CIG pop-up workshop at Warwick University last July. The ethos of sharing is at the core of FRBR and RDA, and is reflected in LC's sharing of its own training materials and in the user-contributed workflows within the RDA Toolkit.

If anyone is interested in seeing our transfer training documentation (a little out of date since the July round of RDA changes) or our ordinary RDA/MARC21 training/reference documentation, it should be available from mid-December 2013 at <http://www.bodleian.ox.ac.uk/our-work/cataloguing>. Comments and corrections are always welcome; please feel free to contact Bodleian Catalogue Support Services, [css@bodleian.ox.ac.uk](mailto:css@bodleian.ox.ac.uk).



The Joint Steering Committee for Development of RDA (JSC) is responsible for maintaining and developing the content of RDA: resource description and access. The JSC comprises a Chair and Secretary and a representative of each of the organizations "constituent" to RDA. There are six organizations which were responsible for the Anglo-American Cataloguing Rules which preceded RDA, plus the recent addition of the first major non-Anglophone community to adopt RDA, the Deutsche Nationalbibliothek. The JSC therefore has nine members, two of which represent UK constituencies: CILIP, and the British Library.

The Chair is asked to give the JSC a year's notice if they intend to stand down. The JSC then appoints a Chair-Elect who will take over. Barbara Tillett, Chair at the November 2012 meeting of the JSC, announced that she would retire at the end of 2013, and I was privileged to be nominated Chair-Elect. So I have spent this year learning the craft of chair as well as representing the CILIP constituency.

#### **Proposals and discussion papers**

The primary method used by the JSC to develop RDA is the consideration of written proposals to amend RDA content and discussion papers on more general issues. Specific amendments which have no significant impact on RDA users are discussed and approved by the JSC using email and shared workspaces in a "Fast Track" process. Amendments with greater impact are discussed at an annual face-to-face meeting. Although that meeting shapes the overall schedule of activity during the year, there is a constant online interaction between the members of the JSC.

The RDA year starts with the development of new proposals and discussion papers by constituencies, constituency representatives, and external groups. The topics may be prompted by the outcomes of the previous year's activities, or be suggested by the practical application or theoretical examination of RDA. For example, the JSC assigned several actions to me after discussion of recommendations in a paper on the representation of relationship designators from Appendices I, J, and K of RDA in Resource Description Framework (RDF) which I submitted to the JSC in 2012, as CILIP representative.<sup>1</sup> I created a follow-up discussion paper to carry out those actions.<sup>2</sup> Another example is the British Library's proposal to add an element sub-type for Period of Activity of the Corporate Body which was based on the practical needs of cataloguers of antiquarian resources.<sup>3</sup>

CILIP was asked by JSC to prepare a proposal on accommodating soft mutations in Celtic languages wherever relevant in RDA. This action was a result of a proposal from the American Library Association (ALA) about initial articles in place names.<sup>4</sup> The CILIP constituency response had raised the issue in relation to the names of places in Wales.<sup>5</sup> Subsequent discussion between the National Library of Wales (NLW) and the National Library of Scotland indicated that the issue did not apply to names based on Scots Gaelic and only applied to some place names based on Welsh, and it was agreed that an example added to RDA would satisfy the NLW.

This was suitable for processing as a Fast Track, which I duly initiated as CILIP representative.

However, the implications of bigger proposals and issues need to be discussed by the RDA constituencies, and the JSC sets a date for their submission to allow this to happen; that was 5 August 2013. Submissions must be made via the constituency representative or the JSC Chair. The CILIP constituency did not send anything this year. My discussion paper had large appendices, so these were published separately, resulting in six documents in total. They can be found on the JSC website in the CILIP document series.<sup>6</sup> The British Library submitted five proposals, and they can be found in the BL document series.<sup>7</sup> The JSC received over 45 proposals and discussion papers in 2013.

### **CILIP-BL Committee meeting**

Constituencies are required to send responses to proposals and papers submitted to JSC to provide a basis for discussion at the JSC's annual meeting. The deadline for responses this year was 5 October 2013, to give the JSC representatives an opportunity to assess the responses and prepare updated proposals. The JSC Chair and Secretary use this time to allocate time for discussion in the agenda.

The UK constituencies discuss their responses in a joint CILIP-BL Committee on RDA, which synchronizes its annual meeting to the JSC responses deadline. Secretarial support for the Committee is provided by the BL. Accordingly the Committee met on 28 August 2013 at the British Library, St Pancras, in London. This was the 19th meeting of the CILIP-BL Committee; like the JSC, it has met more than once per year in the past.

CILIP members of the Committee use the time between the publication of the documents on the JSC website and the meeting, in this case just over three weeks, to enter preliminary responses into a shared workspace provided by the University of Cambridge. BL members can see these during the meeting, and CILIP members are given access to BL comments, via a computer projected display.

CILIP and BL members do not always agree on responses. For example, two options were given in an ALA proposal on colour content.<sup>8</sup> BL members preferred option 1<sup>9</sup>; CILIP members chose option 2.<sup>10</sup> This is clear evidence that the UK benefits from having both constituencies on the JSC.

The Committee Secretary prepares the responses for each constituency when there is straightforward agreement with the proposal or recommendations; otherwise, this is another of the duties of the constituency representative, who is also responsible for submitting the responses to the JSC. In 2013, CILIP had straightforward agreement to 13 documents and made 40 responses in total.

### **JSC meeting**

The JSC held its annual meeting at a branch of the ALA in Washington, D.C., USA, on 4-8 November 2013.

As well as the proposals, papers, and responses, the JSC also discusses Fast Track entries which require clarification or further amendment before being acceptable. This is what happened to the CILIP soft mutation example. The JSC Examples Group suggested that it be placed at RDA 16.2.3.7 Alternative Linguistic Form of Name, and that it conform to recent changes in RDA. I readily agreed as CILIP representative, and the example will appear in the February 2014 release of the RDA Toolkit.

There was general agreement by the JSC members to the recommendations in my discussion paper on relationship designators. I am now working with colleagues who provide services for the RDF namespaces for RDA to update the designators, but it is likely to take several months to complete all the actions resulting from the paper. The JSC failed to reach agreement on the ALA proposal about colour content, and it was withdrawn. The JSC noted the discussion by CILIP in its response, and has suggested that CILIP prepare a new proposal for 2014.

Detail of the outcomes of the 2013 JSC meeting will be published in due course. Meanwhile, some information can be found on the blog of a former ALA representative.<sup>11</sup> Recurring themes raised during the meeting included the internationalization of RDA, RDA's treatment of relationships between FRBR and FRAD entities, and the automated processing of RDA catalogue data. These exemplify the JSC's intentions to ensure that RDA is "designed for the digital world".<sup>12</sup> The world implies international application and the ability to represent relationships between resources described in large aggregations of metadata, and digital implies manipulation of data by computer.

The remaining part of the year following the annual meeting is spent carrying out immediate follow-up actions. These include rewriting proposals to bring them in line with the JSC's decisions, entering and approving the last Fast Track amendments of the year, clearing up other loose ends, and preparing the ground for the New Year, when thoughts turn to developing proposals and discussion papers ... and chairing all this activity!

Next year, the JSC intends to add three new working groups to look at specific aspects of RDA. There are two working groups already covering examples and the treatment of music resources. The new groups will assist the JSC with the development of technical aspects such as models and elements, the RDA/ONIX Framework for Resource Categorization on which the RDA carrier, content, and media types are based, and the treatment of places. If you think you can contribute to these topics and want to get involved, watch out for further announcements from the JSC and the working groups.

All proposal and discussion documents and responses are freely available on the JSC website, along with many other resources giving information about the history of RDA.<sup>13</sup> The CILIP-BL Committee also has a website which gives details of the committee and its work.<sup>14</sup> It includes a collection of open training materials for RDA.<sup>15</sup> Finally, CILIP members can use the lis-ukbibs email list for discussion of RDA issues.<sup>16</sup>

- 1) 6JSC/CILIP Rep/2 RDF representation of RDA relationship designators: discussion paper. Available at: <http://www.rda-jsc.org/docs/6JSC-CILIP-rep-2.pdf>
- 2) 6JSC/CILIP Rep/3 RDF representation of RDA relationship designators: a follow-up discussion paper. Available at: <http://www.rda-jsc.org/docs/6JSC-CILIP-rep-3.pdf>
- 3) 6JSC/BL/11 Revision of RDA 11.4 and 11.13 and Glossary. Available at: <http://www.rda-jsc.org/docs/6JSC-BL-11.pdf>
- 4) 6JSC/ALA/9 Initial Articles in Place Names (RDA 16.2.2.3). Available at: <http://www.rda-jsc.org/docs/6JSC-ALA-9.pdf>
- 5) 6JSC/ALA/9/CILIP response. Available at: <http://www.rda-jsc.org/docs/6JSC-ALA-9-CILIP-response.pdf>
- 6) CILIP Document Series. Available at: <http://www.rda-jsc.org/working2.html#cilip>
- 7) BL Document Series. Available at: <http://www.rda-jsc.org/working2.html#bl>
- 8) 6JSC/ALA/26 Colour Content (RDA 7.17). Available at: <http://www.rda-jsc.org/docs/6JSC-ALA-26.pdf>
- 9) 6JSC/ALA/26/BL response. Available at: <http://www.rda-jsc.org/docs/6JSC-ALA-26-BL-response.pdf>
- 10) 6JSC/ALA/26/CILIP response. Available at: <http://www.rda-jsc.org/docs/6JSC-ALA-26-CILIP-response.pdf>
- 11) Resource Description and Access: ALA Rep notes. Available at: [http://www.personal.psu.edu/jxa16/blogs/resource\\_description\\_and\\_access\\_ala\\_rep\\_notes/](http://www.personal.psu.edu/jxa16/blogs/resource_description_and_access_ala_rep_notes/)
- 12) RDA — Resource Description and Access: A Prospectus. Available at: <http://www.rda-jsc.org/docs/5rda-prospectusrev7.pdf>
- 13) Joint Steering Committee for Development of RDA. Available at: <http://www.rda-jsc.org/>
- 14) CILIP-BL Committee on RDA. Available at: <http://www.slainte.org.uk/aacr/>
- 15) RDA training resources. Available at: <http://www.slainte.org.uk/aacr/training.htm>
- 16) LIS-UKBIBS Home Page. Available at: <http://www.jiscmail.ac.uk/lists/lis-ukbibs.html>

## ALAN JEFFREYS AWARD 2013

We are pleased to announce that this year we have decided to make a joint award for the Alan Jeffreys Award 2013.

The award is made by the Cataloguing & Indexing Group Committee in memory of Alan Jeffreys, the former Chairman of the Group, who died in 1994. The recipient of the award should have made a substantive contribution to the development, teaching or practice of cataloguing or indexing.

The award for 2013 is given to Esther Arens, University of Leicester & Céline Carty, Cambridge University.

Esther's award is in recognition for her work in conceiving, developing (and often delivering) the successful "FRBR for the terrified" workshops. The workshops were always booked out and highly appreciated by all who attended them.

Céline's award is in recognition for her work on supporting the adoption of RDA within the UK academic library community. She has been very visible in supporting cataloguers beyond her institution, especially in social media and through feeding back her experiences at ALA.

Congratulations to both winners.

We'll be looking for new nominations next year again so keep your eyes open in the summer, but in the meantime, please be thinking of who you could nominate. It can be any member of CILIP/CIG, at any stage of their career and full details of the terms of reference can be found with the details of last year's nomination process at: <http://www.cilip.org.uk/cataloguing-and-indexing-group/news/alan-jeffreys-award-call-nominations-2013>

*This is a new feature, to allow people to make quick points, ask questions or seek help. Please reply directly to the correspondents and we'll ask them to summarise responses for the next issue.*

**From Jennie Hillyard, Librarian, North of England Institute of Mining and Mechanical Engineers**

[librarian@mininginstitute.org.uk](mailto:librarian@mininginstitute.org.uk)

My problem to air on RDA would simply be access to it! I'm a solo librarian in a small charity library and previously I had a paper copy of AACR2 concise and I could consult the full version at Northumbria University library when necessary. Without paying for access to the toolkit, I simply can't move on to RDA despite being in the middle of a large stockcheck to improve catalogue records which would be an ideal time.

I do all original, in house cataloguing and use the free online Library of Congress authorities (much appreciated) and an inhouse subject thesaurus.

I have taken on board what I can (e.g. I have abolished the rule of 3, using "illustrations" and "pages" instead of the abbreviations) but without a cheaper "simple" version equivalent to the concise printed AACR2, it will be impossible for me to keep up with the changes.

**From Jessica Hudson, Royal Botanic Gardens, Kew**

[libjess@outlook.com](mailto:libjess@outlook.com)

I wonder if your readers might be kind enough to offer me some advice? I am a Library Graduate Trainee at the Royal Botanic Gardens, Kew and I'm currently considering the various Library and Information Studies MA courses that are available. Unfortunately there are some that do not appear to offer any cataloguing modules which I am very much interested in pursuing. I was therefore wondering what other (accredited) cataloguing training opportunities are available (including rare books cataloguing) and where the best place would be to go for these? I would be very grateful for any advice and guidance that anyone could offer me.

Thank you very much for your help!

**From Alan Nash, Public librarian, London**

[alan.nash@bromley.gov.uk](mailto:alan.nash@bromley.gov.uk)

I am a qualified librarian working on the front line in a public library, and recently attempted to find opportunities for gaining more experience in the more technical aspects of the profession, such as AACR2 and Marc Standards, but have found that there is little help available. I was schooled in Cataloguing and Indexing when training for my qualification, but since then have not been able to use them in a real work setting, and feel that my skills are beginning to slip away. Attempting to keep up to date with such things is difficult when you are not using them professionally, and there is little access to resources allowing off the job practice. I feel that if CILIP or another organisation had programmes designed to help those in my position, it would benefit the profession greatly, and give people such as myself the confidence to apply for jobs where specific knowledge and experience is asked for. Learning from books and second-hand sources is fine, but this knowledge cannot be applied directly in the workplace, thus it would be helpful if volunteering opportunities were available to help bridge this gap.

I would be interested to discover if others in my position feel the same.

## Book reviews

**RDA and serials cataloguing / Ed Jones.**

**London : Facet, 2013. xiii, 215 p. 9781856049504**

**Reviewed by Wendy Stacey, Cambridge University Library**

The book is divided into two parts. In the first part, Chapter 1 gives a comprehensive introduction to serials and serials cataloguing. It begins with a definition of a serial and moves on to discuss their organic nature and the resulting implications for the cataloguer. As a new serials cataloguer, I found the section describing the history of serials cataloguing, and changes in practice over the years, very useful as it enabled me to make sense of the records I am finding in our hybrid catalogue. Chapter 2, Getting to know RDA, gives an outline of the structure and organisation of RDA and moves on to describe specific changes from AACR2 to RDA that are relevant to serials cataloguing.

In the second part of the book, Chapter 3 gives advice on searching for serial records in a bibliographic database and Chapter 4, which makes up the bulk of the book, gets down to the nitty gritty of cataloguing serials and integrating resources using RDA. Chapter 4 discusses attributes of resources, relationships between serials, looks at identifying works and expressions and covers authorised access points. It is generally organised by International Standard Bibliographic Description (ISBD) area which makes it easy to quickly dip in to the relevant section. It contains lots of examples in MARC 21, detailed explanations of the changes from AACR2 and complete record examples. The book ends with a look at linked data and the semantic web.

Personally, as a monograph cataloguer seconded to the role of serials cataloguer just as our institution began cataloguing in RDA, this book has proved invaluable. As the author intended, the answer to a question can usually be found in one place with a clear explanation, details of the relevant RDA instructions and very helpful MARC 21 examples. These examples have saved me on the occasions when I have understood what information RDA is instructing me to record but not how to record that information in a MARC record.

Overall, this book is well written, easy to read and humorous. I would recommend it both to new serials cataloguers and experienced serials cataloguers finding their way in RDA.



## Book reviews

**Catalogue 2.0: the future of the library catalogue / edited by Sally Chambers. London : Facet, 2013. 9781856047166**

**Reviewed by Niki Wilson, Kingston University**

Catalogue 2.0 essentially gives an excellent overview about the changes taking place in (mainly) academic library catalogues using examples and case studies for inspiration along the way. Interestingly, the book rarely touched on RDA and focussed more on outside technologies which are having an impact for the good on our libraries instead.

The book is divided into useful chapters each highlighting important improvements or changes taking place in many library catalogues. It begins with an overview of the main changes which have taken place in recent years and interestingly explores possible assimilations with other technologies. The second chapter discusses searching and how the expectations of users of catalogues have changed given the omnipresence of search engines in everyday life and how we all expect library catalogues to behave in the same way.

The middle chapters debated new technologies benefitting library catalogues. I especially enjoyed the chapters about discovery services and mobile technologies, which both used examples of implementations within libraries which I found particularly interesting and inspirational. The later chapters on FRBR and the semantic web were quite technical at times but again, the case studies used made them interesting. The book closes with a chapter about “digital scholarship” which explains how institutional repositories are having huge roles in catalogue visibility as well as how collaborative working is having an impact on cataloguers’ work. Finally we are presented with a great summary chapter which left me feeling motivated about the future possibilities in cataloguing.

Overall this is an excellent summary of the changes taking place in library catalogues across the world today. Though I felt it could be slightly technical at times, I felt inspired by the overall themes of improvement and technological progress. I would recommend this book to every cataloguing librarian, collections managers, as well as anyone with an interest in the future of librarianship and information science.

## Book reviews

**RDA: strategies for implementation / Magda El-Sherbini. London: Facet Publishing, 2013. 394p. ISBN 9781856048347 (pbk)**

**Reviewed by Karen F. Pierce, Cardiff University**

As of April this year (2013) RDA was fully implemented by the Library of Congress, British Library and several other British libraries such as Cambridge. Even if your library has yet to embrace RDA you will have noticed increasing numbers of RDA records appearing via external cataloguing agencies. The cataloguing community in general has proved to be very generous with a large amount of helpful material on RDA available on the internet; but if you are in the process of adopting RDA, or even just thinking about it at the moment, you will probably wish to have some books to hand to lend guidance. El-Sherbini is well placed to author such a text as she served as a member of the ALA RDA Advisory Board, and her library (Ohio State University) served as a test library, both for the beta testing of the RDA toolkit, and testing the RDA code in the US.

The book starts by providing a brief background to the history of AACR2 and discusses where the need and direction for RDA originated. The second chapter then moves on to give side by side comparisons between RDA and AACR2, highlighting similarities and differences. Although my library has yet to adopt RDA, we have already found this beneficial when checking many of the RDA records that are being accepted into our system.

The third chapter is where we get into actual strategies for implementation, and is therefore one of the most useful in the book, covering the main topics you will need to think about when preparing to change from AACR2 to RDA, and listing tips and hints. It also points to other relevant points in the book, so for instance, the training tip on becoming familiar with the RDA Toolkit notes that Chapter 7 will provide greater details and descriptions of the Toolkit. Some of the training hints are provided on the basis of fairly large departments (e.g. '*limit your training groups to no more than eight participants*'), as many of the cataloguing departments I am aware of are a lot smaller than this you may have to tailor some of these ideas. This chapter also looks at the effect on OPAC displays, and new MARC 21 fields, and raises the issue of entering into dialogues with LMS vendors.

Of course to get to grips with RDA you really need to understand FRBR and FRAD, and to this end, El-Sherbini walks us through the FRBR model, and looks at specific types of library materials.

Many people have found the RDA Toolkit quite difficult to navigate, thus this section of the book takes a practical approach to help readers familiarise themselves with the way it operates. I would suggest working through the chapter with the Toolkit open in front of you; and you may also find it valuable to have at hand when you initially start using the Toolkit as part of your regular practice.

To conclude the book we have a chapter with examples of RDA records for specific types of materials, and a final chapter with three workflow checklists.

In addition to these final chapters, throughout the book you will find examples, and suggestions of where to look online for further advice, as well as plenty of references. It makes no claim to be the only tool you will need, but instead acts as a solid starting point to set you off in the right direction. I especially like the advice given at the end of Chapter 3:

*“Keep an open mind and do not panic. Remember you are not alone.” (p.100)*

Our plans for the next few issues of Catalogue & Index are as follows:

- No. 174 (March 2014): themed on linked data, drawing on the very successful recent CIG and CIGS events
- No. 175 (June 2014): themed on career development
- No. 176 (September 2014): themed on project management
- No. 177 (December 2014): papers from the CIG Conference

■ Obviously we may change our plans if circumstances change, or if we (or you) have better ideas.

■ If you think you might like to contribute, please contact the editors!



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For book reviews, please contact the Book Reviews Editor: Neil T. Nicholson, Cataloguing & Metadata Services Team Leader, National Library of Scotland, e: [n.nicholson@nls.uk](mailto:n.nicholson@nls.uk)

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