Up, Up, and Away with RDA!
Staff Training, Implementation, and Monographic Workflow

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March 19, 2014
What We Won’t Cover Today

- This will not be an RDA training session
- We will not be explaining every FRBR concept and nuance
- We will not be handling serial cataloging issues, nor special categories of materials
- We will not be reviewing the RDA Toolkit
What We Will Cover Today

- Practical Pointers for Training Staff in RDA and FRBR Foundational Concepts
- An RDA Implementation Strategy that Works
The Heart of It

- Policy and Strategy Considerations
- Training Strategy and Techniques
- Monographic Workflow and Procedures
- Results, Assessment, & Future Directions
“The catalogue has to tell you more than what you ask for.”

Seymour Lubetzky (1977)
POLICY AND STRATEGY CONSIDERATIONS

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Nervous?

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Overwhelmed?
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UIC Strategy

- Enhance access for our users
- Begin with monographic workflows
- Start with copy cataloging implementation May 1\textsuperscript{st}; original cataloging Sept. 1\textsuperscript{st}
- Create hybrid records for incoming AACR2 records via selective element additions
External Factors to Consider

- ILS vendor accommodations
- Consortium requirements
- Local, national, and international impact of migration
- Impact on authority control
Library Factors to Consider

- Impact on manual, automated, and outsourced workflows
- Impact on local library policy, such as authority control
- Costs involved: up front and hidden
- Available staffing resources
- Appropriate levels of staff training
- Support of the library administration
UIC Policy Decisions

- Implement RDA in a timely manner
- Provide some immediate value-added capacity for our users
- Copy catalogers verify LC core RDA elements per format for RDA constructions
- Copy catalogers create hybrid records for AACR2 and pre-AACR2 constructions
Training Strategy

- Focus on copy cataloging staff needs
- Emphasis on User Needs
- Interact and discuss: peer to peer
- Repeat until common understanding
- Bring day to saturation point and end
Practicalities and Tactics

- Pair veteran copy catalogers with beginners: peer to peer
- Explain one concept from multiple angles of view
- Repeat in ever greater detail
- Begin with FRBR foundational concepts; promote user tasks
Effective Training Techniques

- Establish ground rules
- Assume no previous knowledge
- Provide enough training to get going
- Avoid getting entangled in “edge” or “fringe” issues
- Use concrete examples from your catalog
How many FRBR entity relationships can you identify?

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An expression realizes only one work.
But an expression can be embodied in many different manifestations.
FRBR Concepts

- Start and end with the user: User Tasks
- Emphasize the various entity relationships
- Describe the 4 Group 1 Entities in an understandable way: Work, Expression, Manifestation, Item
Foundational RDA

- If RDA record construction…

- If AACR2 or Pre-AACR2 record construction…
Moving Forward Together

- Synchronize procedures for monographic formats
- Follow LC Core recommendations
- Create hybrid records for pre-RDA record constructions
- Maintain general material designation per consortium request
Variable Fields Reviewed for RDA Elements

- 245 field
- 250 field
- 260/264 fields
- 300 field
- 336 field #a #2
- 337 field #a #2
- 338 field #a #2
Print Monograph Workflow

Collection Development Librarians choose titles

Orders are placed electronically with domestic and foreign vendors by Acquisitions staff

Receipt, invoicing, and either Manual Processing for special orders or Batch Processing is performed for most firm and approval slip orders and all approval book shipments

OCLC record is identified as RDA or not in all Batch and Manual Workflows

If RDA Record Construction, cataloger verifies content elements for accuracy and appropriateness, as well as for purposes of ongoing training - Cataloger generally accepts record

If AACR2 or Pre-AACR2 Record Construction, cataloger adds selected RDA elements based on current policy to create a hybrid record - Copy catalogers do not upgrade records to RDA standard at this time.

Cataloger exports record into local catalog and adds appropriate holdings data

Cataloger exports record into local catalog and adds appropriate holdings data
Batch Processing Workflows

- Print firm orders
- Approval slip orders
- Approval book direct shipments

Most records are now scrutinized:
- Adding RDA elements
- Authority heading verification
Manual Monographic Workflows

- Rush and special handling materials
- Government documents
- Tangible electronic formats
Electronic Books

- Packages
- Individual titles
RESULTS, ASSESSMENT, & FUTURE DIRECTIONS

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What Works

- Borrow training materials selectively and tailor to your institutional needs
- Repeat concepts, again and again
- Emphasize FRBR user tasks
- Demonstrate continuity with legacy records
- Analyze RDA records from your own catalog and consider hybrid constructions
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Average Times for Copy Cataloging

- Average Minutes in May (over a 5 day period)
- Average Minutes in June (over a 5 day period)
- Totals - Average Time in Minutes (May to mid June)

Bar chart showing:
- AACR Hybrid Records
- RDA Records
- AACR plus RDA Records
Monographic Copy Cataloging Totals
May through mid June 2013

Number of Titles Cataloged Within the 1st 6 weeks in 2013, Parsed by Complexity (Total Titles: 1908)

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Where We Are Headed

- Cataloger training is ongoing
- Consider macros in your workflows
- Introduce all library staff to the new culture
- Stay attuned to annual changes with RDA
- Focus on durable and sustainable access for the users
URL for Google Box Docs

- https://uofi.box.com/rdaawebinar
SELECTED RESOURCES


Questions?

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