Test of the Official RDA Toolkit

Presented by Adam Baron

On behalf of the Task Group to Test the Official RDA Toolkit

PCC Joint Operations Committee Meeting, May 5, 2023

Task Group to Test the Official RDA Toolkit

- Adam Baron (UC Berkeley), Co-Chair
- Judith Cannan (LC), Co-Chair
- Dominique Bourassa (Yale)
- Annick Cloatre (BL)
- Laura Doublet (U of Victoria)
- Greta de Groat (Stanford)
- Oksana Osborne (GPO)
- Gordana Ruth (NLM) (2022)
- Trina Soderquist (LC)

The Test
October 17-November 4, 2022

- Create 6-8 bibliographic records and at least 1 authority record (if NACO trained) using the Official RDA Toolkit, the LC-PCC Policy Statements, and the Metadata Guidance Documentation

- Document the steps taken to describe items, as well as the difficulties encountered, using the supplied Tester Template in order to identify where policies and guidance may need revision

- Submit Posttest Survey for Testers
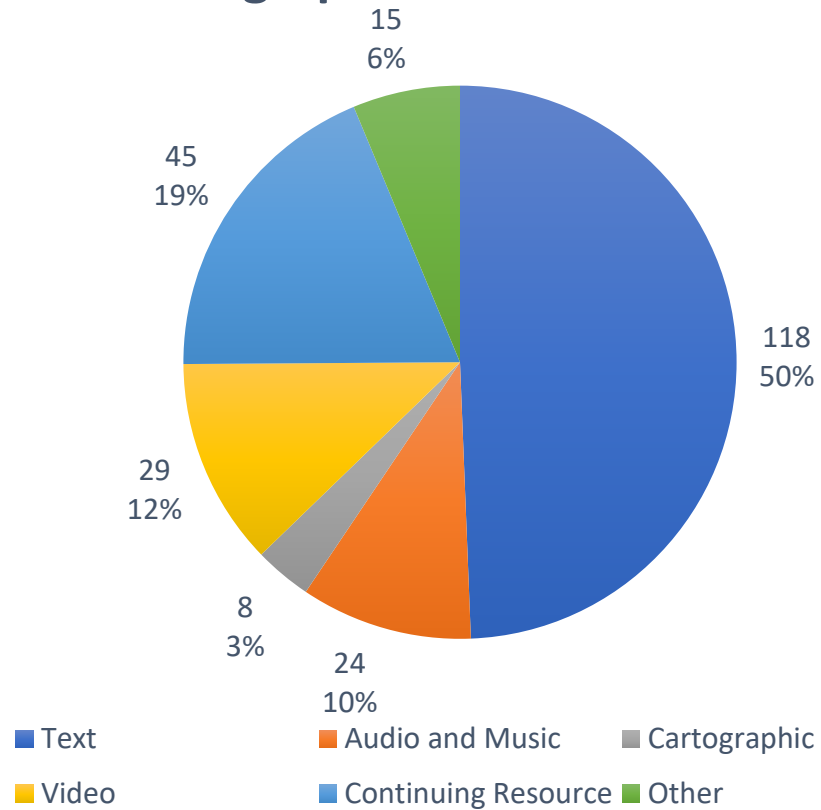
Preliminary Test Results

- 45 testers completed the test

- 285 records were created
  - 239 bibliographic records
    - 23 BIBFRAME records in Sinopia
      - 6 electronic books
      - 7 print books
      - 4 videodiscs
      - 6 serials
  - 46 authority records
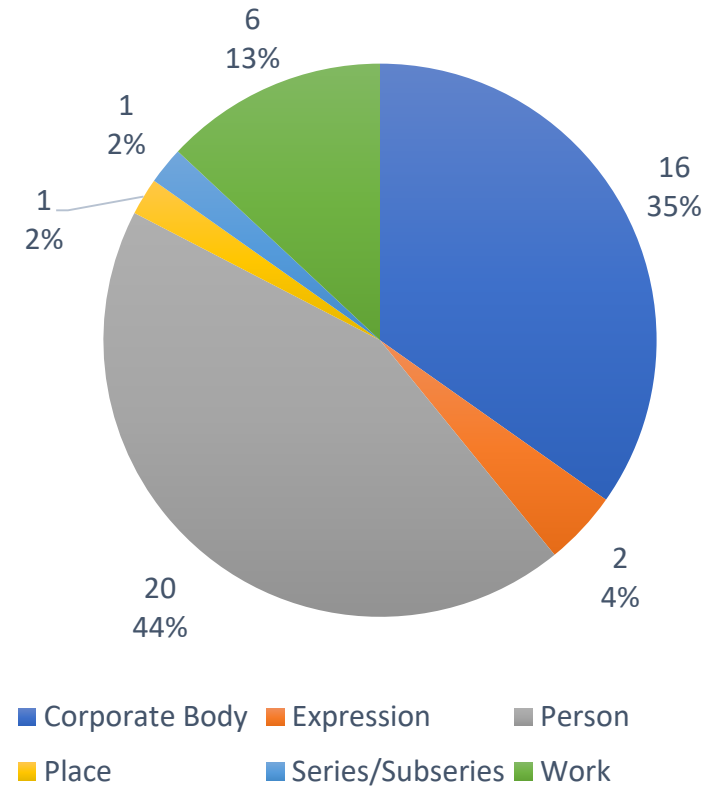
Languages and Scripts

- Dutch
- English
- French
- German
- Italian
- Spanish

- Chinese
- Hebrew
- Japanese
- Serbian
- Russian
- Ukrainian

Preliminary Test Results

Bibliographic Records Created

- 118 — 50% — Text
- 24 — 10% — Audio and Music
- 8 — 3% — Cartographic
- 29 — 12% — Video
- 45 — 19% — Continuing Resource
- 15 — 6% — Other

Authority Records Created

- 16 — 35% — Corporate Body
- 2 — 4% — Expression
- 20 — 44% — Person
- 1 — 2% — Place
- 1 — 2% — Series/Subseries
- 6 — 13% — Work

The Evaluation

November 14, 2022-January 30, 2023

- Review bibliographic and authority records that testers created using the Official RDA Toolkit, the LC-PCC Policy Statements, and the Metadata Guidance Documentation

- Analyze tester templates and compile comments and observations using the supplied Evaluator Template in order to identify where policies and guidance may need revision

- Submit Posttest Survey for Evaluators

The Analysis
February-June 2023

- 45 posttest surveys from testers

- 19 posttest surveys from evaluators

- Almost 6000 rows of data from the evaluator templates

Posttest Survey Preliminary Results

- Testers received minimal training
  - Basic training on using and navigating the official RDA Toolkit
  - No training on RDA concepts and terminology

- No metadata application profile was provided

- Testers and evaluators were asked to identify problems and difficulties encountered so we could identify areas that need to be corrected before (or after) implementation
  - Testers and evaluators were not asked to identify what worked well or what they liked about the official RDA Toolkit

Posttest Survey Preliminary Results

- Each of the following slides includes a posttest survey question followed by summarized responses from testers and evaluators.

- The responses are based on the experiences of the testers and evaluators and do not necessarily reflect the views or opinions of the task group or PCC.

- The final report with the task group's recommendations is forthcoming.

Where did the tester(s) have difficulty interpreting Official RDA?

Most common posttest survey responses from testers and evaluators

- Language, Style, Terminology, and Definitions
  - Dense, opaque, convoluted language
  - Instructions difficult to decipher

- Structure and Organization
  - Not knowing where to start
  - Easy to get lost

- Navigation and Search
  - Many MGDs not linked to policy statements
  - Long and winding routes to instructions

Where did the tester(s) have difficulty interpreting Official RDA?

Most common posttest survey responses from testers and evaluators

- Which element, instruction, or recording method to apply
  - Elements that correspond to MARC 33X $b and $2
  - Sorting through conditions and options
  - Which recording method corresponds to URIs used in Sinopia

- Specific elements
  - Examples: title proper, name of publisher, dimensions of cartographic image, and many more

- Data provenance, Source of metadata, and Metadata work

Where did the tester(s) have difficulty interpreting Official RDA?

Some other posttest survey responses from testers and evaluators

- Aggregates and diachronic works
  - Understanding guidance and instructions

- Relationship elements/relationship labels
  - Locating and using PCC documentation

- Superelements/subelements, related elements, shortcut elements, hierarchy

- Lack of examples

- Mismatch between RDA and PCC terminology

Which areas do you think will require extra attention during training?

Posttest survey suggestions from testers and evaluators

- Navigation and Search
  - Basic searching and navigation
  - Navigating across Entities, Guidance, Policies, and Resources

- Language, Terminology, and Definitions
  - Vocabulary -- what do terms mean?
  - Gain familiarity with entities and elements

- Structure and Organization
  - Multiple ways to find what is needed
  - Applying options, LC-PCC Policy Statements, and Metadata Guidance Documentation

Which areas do you think will require extra attention during training?

Other posttest survey suggestions from testers and evaluators

- Aggregates and diachronic works
  - Clarification of the different types of aggregates
  - Aggregates vs. diachronic works
  - Extension plans and entity boundaries
- Superelements and subelements
  - Which hierarchy level of an element to use
- Relationship elements
  - Switch from relationship designators
  - Finding the relationship labels

Which areas do you think will require extra attention during training?

Posttest survey suggestions to help with training

- Application Profiles
  - "Start here" documentation

- Examples
  - Format specific examples
  - MARC and non-MARC examples

What do you think PCC needs to do before implementing the Official RDA Toolkit?

Most common posttest survey responses from testers and evaluators

- Improve the structure and navigation
- Make MGDs more consistent, and expand with searchable links
- Create application profiles for all formats
- Clarify the language: opaque and too complicated
- Include links to make other standards more accessible
- Offer online and in-person overview training sessions
- Provide clear links to relationship label MGDs

What do you think PCC needs to do before implementing the Official RDA Toolkit?

Some other posttest survey responses from testers

- Provide more examples in RDA Toolkit and MGDs

- Clarify and expand instructions

What do you think PCC needs to do before implementing the Official RDA Toolkit?

Some other posttest survey responses from evaluators

- Provide more guidance on cataloging diachronic works and integrating resources

- Make transcription guidelines more accessible from RDA Toolkit and MGDs

- Map MARC fields and subfields to RDA element names

- Facilitate application with BIBFRAME records

What are your suggestions that will help with the implementation process?

Most common posttest survey suggestions from testers and evaluators

- Implement in phases
  - Soft launch with early adopters; phase by format
- Improve overall usability of LC-PCC PSs, MGDs, and Toolkit
  - Navigation/Search
  - Structure/Organization
  - Language/Style/Terminology
  - Additional examples
  - MARC mappings

What are your suggestions that will help with the implementation process?

Most common posttest survey suggestions from testers and evaluators

- Create metadata application profiles
  - BSR & CSR - update and/or create similar documents
  - Quick start guides
- Create training documentation to make RDA more understandable
  - Organize according to particular cataloging tasks or formats
- Address special formats
  - Streaming video, music audio, etc.

What are your suggestions that will help with the implementation process?

Some other posttest survey suggestions from testers and evaluators

- Collaborate with other communities
  - MLA, OLAC, OCLC, and LIS educators

- Provide more mappings from original RDA

- Update NACO guidance
  - Expectations regarding new records and edits needs to be clear

- Improve public relations
  - Official Toolkit is meant to be used in conjunction with other tools

Which policies or metadata guidance documents should be revisited by PCC *before* implementation?

Posttest survey responses from testers and evaluators

- MGDs: Navigation, searching, structure, and organization
  - Questions about the PDF format
  - Requests for ability to search across all MGDs simultaneously
  - Observations that links took users to MGDs that were either too general or too specific to be helpful
  - Need for links from specific RDA elements to relevant MGDs indexed under **Relationship labels** and **Descriptive relationships**

Which policies or metadata guidance documents should be revisited by PCC *before* implementation?

<u>Posttest survey responses from testers and evaluators</u>

- Guidance on "regular," "straightforward" cataloging

- Diachronic works
  - Requests for a serials-specific MGD
  - Questions about specific elements, especially how CONSER practice aligns with or deviates from the RDA Toolkit

- Specific elements
  - authorized access points; Corporate bodies; extent of manifestation; media type; numbering of sequence; title proper

Which policies or metadata guidance documents should be revisited by PCC *after* implementation?

Posttest survey responses from testers and evaluators

- Regular review and revision of LC-PCC PSs and MGDs

- Navigation in MGDs needs improvement

- More BIBFRAME support in policies and examples

- Issues needing policies and clarification
    - Vocabulary encoding schemes (VES)
    - WEMI
    - Aggregates
    - Authority control

Provide any final comments you have about the PCC RDA test, RDA, LC-PCC PSs, or MGDs.

Posttest survey responses from testers and evaluators

- PCC RDA test
  - Appreciative of the opportunity
    - Very valuable experience
    - Learned a lot
  - Gained confidence
  - Not enough time

Provide any final comments you have about the PCC RDA test, RDA, LC-PCC PSs, or MGDs.

Posttest survey responses from testers and evaluators

- RDA Toolkit
  - Difficult to use
  - Lacks practical and intuitive structure for everyday catalogers
  - Language and terminology was problematic and difficult to understand
  - Concern for novice and less experienced catalogers

Provide any final comments you have about the PCC RDA test, RDA, LC-PCC PSs, or MGDs.

Posttest survey responses from testers and evaluators

- LC-PCC Policy Statements
  - Sometimes confusing and unclear
    - Could more explicitly indicate when options should be applied
  - Links to MGDs are missing

- Metadata Guidance Documentation
  - Very useful
  - Cannot search content across MGDs

Goals of the Analysis

- Identify and recommend changes to LC-PCC Policy Statements and Metadata Guidance Documentation, prioritizing changes that must be made before implementation when possible

- Identify and recommend changes to the Official RDA Toolkit

- Identify areas that require extra attention during training

- Provide suggestions for implementation

Expected Timeline

LC-PCC Policy Statements & Metadata Guidance Documentation

- March-June: Identify and recommend specific changes to LC-PCC PSs and MGDs

- July: Share recommendations with PCC and LC

- July-November: LC updates LC-PCC PSs and MGDs

Final Report and Recommendations

- July-September: Prepare report and recommendations

- September: Share report and recommendations with PCC

Work in Progress

- LC updated LC-PCC PSs to include additional links to MGDs.

- Task group is working on test analysis to identify and recommend specific changes to LC-PCC PSs and MGDs.

- SCT RDA Training Task Group is finishing introductory training and will be presenting a joint preconference with NARDAC at ALA Annual that aims to explain more of the new concepts.

- A group is working on MGDs specifically for string encoding schemes.

- The RDA Communications Committee Feedback Form can be used to submit LC-PCC PS and MGD revisions, questions, or feedback to PCC.

Some Work to Come Before Implementation

- Updates to LC-PCC PSs and MGDs

- Complete analysis of the test evaluation, including recommendations for training

- Creation of metadata application profiles

- Full training for cataloging using official RDA

Resources

- PCC RDA Test Documentation & Training
  https://bit.ly/PCC-RDA-Test-Documentation
  - Documentation for Testers
  - Documentation for Evaluators
  - Training for Testers
  - Orientation for Evaluators
  - Presentations

- Questions: pccrdatest@lists.berkeley.edu