

Implementation of the New RDA Toolkit

Introduction

On October 28, 2020, at the PCC Policy Committee meeting the planned launch of the RDA Beta Toolkit by ALA Publishing on December 15, 2020 was discussed and certain decisions reached with respect to its future implementation by PCC.

- PCC will not be implementing new RDA Toolkit before July 2022, but will be continuing to plan for its adoption and will keep the membership informed.
- PCC will continue to use the current Toolkit that ALA has said will remain accessible and as of now has not stated when it will be archived.
- In deciding when to implement, PCC will take into consideration its strategic priorities and ALA Publishing schedule of updates to the Toolkit.

New RDA Toolkit Launch: Status of LC-PCC policy statements

- Even if LC has all the policy statements in the Beta RDA Toolkit they will not have been proofed.
- When exploring the new Toolkit, PCC members need to remember that as far as the policy statements go it is still in DRAFT format. Therefore LC will accept no comments on the unfinished product.
- Only after next ALA upgrade in spring 2021 will LC be ready to receive comments and provide a form for submitting them.

PCC RDA Metadata Documentation

- These documents will give guidance on how to apply the policy statements in both MARC and BIBFRAME and will provide examples for both standards.
- The LC-PCC PSs team will not start working on these documents until all the PSs are in the RDA Toolkit, reviewed, edited and proofed.

- PCC RDA Metadata Documents will be Word documents converted to PDF and loaded on an LC Internet website. This is a matter of expediency.
- Meanwhile LC will explore other options for creating the PCC RDA Metadata Documents that will permit greater flexibility.
- Possible alternative methods for creating, distributing, and searching PCC RDA Metadata Documents will be discussed with PCC PoCo and if approved implemented in 2022-2023 with a conversion of existing documents.

Test

- PCC agrees that the RDA Toolkit needs to be tested before implementation.
- All LC-PCC PSs and all PCC RDA Documentation must be completed before the test commences.
- PTCP will prepare forms for the testers working in either MARC or BIBFRAME (PCC members using Synopia, LC staff using the BIBFRAME Editor).
- Test will last two months with a month for the analysis of the results.
- Question: Do we ask institutions to volunteer a person or do we ask the cataloging members directly? How large a group should test the RDA Toolkit? Group should comprise LC catalogers and PCC catalogers from other institutions?
- Institution will decide how the test should be conducted in their institution. Only create records following the new RDA Toolkit or do double cataloging recreating the record using the old Toolkit. Do the test in MARC or linked data environment. Catalog everything that crosses their desks using the new toolkit or a just catalog a subset?

Requirements to Implement

- Test completed and approved changes made to policy statements and released in an upgrade to Toolkit.
- Test completed and approved changes to PCC RDA Metadata Documentation made and mounted on website.

Implementation Plan

- With over 300 catalogers to train LC will have staff working in 2 different versions of RDA for about 3-5 months. LC catalogers will begin using new version of RDA immediately after being trained.
- LC hopes to implement RDA using the BIBFRAME editor, so the staff will not be trained to apply the RDA Toolkit in a MARC environment.
- Should the implementation date be a rolling date allowing PCC members to choose whether to be trained in a linked data or MARC environment or remain with the former toolkit for a while?

Rough Timeline

This timeline will be impacted by PCC PoCo decisions. The dates are suggestions to provide some guidance only.

January to March 2021:

- LC will complete its work on the LC-PCC PS
- LC will take no editorial comments.
- Time permitting LC will start working on PCC RDA Metadata Documentation.

April to June 2021:

- PCC RDA Metadata Documentation under development
- LC will take comments on policy statements?

July to September 2021:

- Work on PCC RDA Metadata Documentation continues
- Edits to policy statements

October to December 2021:

- Work on metadata documentation finalized
- Toolkit upgrade makes all essential changes publicly available
- Test starts?

January to March 2022

- Analysis of test

- Corrections made to policy statements and PCC RDA Metadata Documentation
- Prepare training materials

April to June 2022:

- Toolkit upgrade makes all essential changes publically available
- Continue Preparing training materials
- Implementation date possible

July 2022:

- Training catalogers in RDA Toolkit launched December 15, 2020 can start