



You be the star... we'll stay Backstage

My name is Maritta Coppieters, and I am the Vice President for Bibliographic Services at Backstage Library Works. We appreciate the opportunity to present the results of the RDA Test at Backstage.

I've never heard of Backstage!

- ★Based in Provo, UT and Bethlehem, PA
- ★Provides professional & technical services to libraries, museums, and archives... including:
 - ★Digitization & metadata
 - ★Microfilming, storage, duplication
 - ★Authority Control (automated & manual)
 - ★Bibliographic Services: reclassification, retrospective conversion, & cataloging



Some of you might not be familiar with Backstage. We are a medium-sized, privately owned company with offices in Utah and Pennsylvania.

We provide professional and technical services to cultural institutions, primarily libraries, but also museums and archives. Our areas of service involve Digitization & related metadata; Microfilming, microfilm storage, and microfilm duplication; Authority control & other automated bibliographic work; and manual bibliographic services, including reclass, retro-con, and cataloging.

Some background...

Bibliographic Services Department, 2010

- ☆ 37 FTE (6 managers, 6+25 team leaders + technicians/catalogers)
 - 4+16 retrospective conversion/copy cataloging, 2+9 copy/original cataloging
- ☆ 9 active contract catalogers
- ☆ 49 clients
- ☆ 711,248 cataloging transactions
 - 263,177 items copy cataloged as-is or cards keyed as original records
 - 279,022 records manually reclassified
 - 150,431 items heavily edited copy or original cataloging
 - 18,618 items physically processed (security strips, spine labels, barcodes, etc)
- ☆ 22 languages, including European, Scandinavian, JACKPHY
- ☆ Monographs, ebooks, serials, pamphlets, AV media, websites
- ☆ \$1.5 million service operation



Let me give you some background on the size and scope of the work we do in our department at Backstage.

At the end of 2010, our department had the equivalent of 37 FT employees; six of those are in management positions, myself included. The other 31 are involved in the production aspects of our work, with 6 team leaders supervising and quality checking the work of 25 technicians and catalogers (you can see the breakdown of the retro-con teams vs. the cataloging teams; all teams are trained for reclassification).

In addition to our in-house staff, we currently have 9 active professional contract catalogers around the country and the world.

In 2010 we had 49 clients with active projects, ranging from academic and public libraries to publishers and museums.

The services we provided to those clients included over 700K cataloging "transactions." I've broken them down for you here.

Over 250K searches for as-is copy, or retrospective conversion records created;

We manually reclassified 275K records (this is typically from Dewey to LC); 150K records were either fully edited copy cataloging or originally cataloged;

and 18K items were physically processed. (We haven't traditionally done much physical processing, but this number is on the rise.)

In addition, we scanned 1.5 million catalog cards, and sorted out 600,000 added entry cards from main entry cards before processing.

We handled material in multiple languages and formats.

The RDA test, by Backstage

- ☆ 1 manager (20 years AACR experience)
- ☆ 2 novice catalogers (less than 1 year AACR2 experience)
- ☆ 2 experienced catalogers (10-15 years AACR2 experience)
- ☆ RDA Common Set (25 original, 5 copy)
 - ❑ Cataloged by novice catalogers per RDA Test instructions: each cataloger cataloged half the records in RDA, half the records in AACR2
 - ❑ Cataloged by experienced catalogers using alternate instructions: each cataloger cataloged half the records twice, once in RDA, once in AACR2
- ☆ RDA Extra Set (102 original and copy records)
 - ❑ 25 ebooks (courtesy of ebrary)
 - ❑ 25 ebooks (courtesy of Primary Source Media, an imprint of Gale)
 - ❑ 10 print serials & 2 Chinese serials (courtesy of Bowdoin college)
 - ❑ 10 CDs, 5 DVDs (courtesy of University of Wyoming)
 - ❑ 25 miscellaneous monographs & serials (from the Backstage in-house library)



Obviously RDA will affect the work we perform at Backstage, just as it will affect your library. We were very excited to be invited to be part of the formal RDA test and decided to involve staff across different experience levels.

We selected an MLS manager with a lot of cataloging experience, who became our primary RDA trainer;

we trained two brand new catalogers, and

we trained two experienced catalogers.

The test required that at least two catalogers catalog the “common set,” half in AACR2 and half in RDA (one person catalog the item in AACR2, the other person catalog it using RDA).

Our new catalogers handled the common set records, per the test instructions.

Our experienced catalogers handled the common set records differently. We wanted to eliminate variances between the records that might occur naturally if two people catalog the same item, so we had our experienced catalogers catalog their common set titles twice (once in RDA, once in AACR2). These records were not considered part of the test and were not submitted with our test results.

In addition, the test required at least 25 items cataloged using RDA rules from our current work flow – called the “Extra Set.”

We selected 25 items from our current customers for each cataloger for our extra set – these were a mix of ebooks (we do a lot of ebook cataloging) and print or media items.

Training

- ★ FRBR studies – LC brochures, websites, blogs
- ★ LC Webcasts from “Train the Trainer” (ALAMW '10)
- ★ Other LC documentation & tools
- ★ Other Libraries’ Documentation (BYU, U. Chicago)
- ★ Group setting: read, study, return & discuss
- ★ Practice records with feedback
- ★ Example records in OCLC (we trained in October and cataloged in November)

Assumptions & Realities

Assumption: Cataloging in RDA will be more expensive than cataloging in AACR2.

- 1. So many options, will have to learn different specs for different institutions**
- 2. Relaxed restrictions means more metadata will be input into records**
- 3. Upgrading AACR2 copy to RDA**



I came into the test with a list of some assumptions & theories that I wanted to explore. In the interest of time, I'm only going to touch on one of those assumptions for you – I believe it is the most important for our organization to address.

I confess that I believed that implementing RDA would result in increasing prices for our cataloging services. Why did I feel that way? Well, first, I could see that RDA allowed for more options than AACR2. This would mean that our cataloging staff would have to keep straight all the different sets of specifications for all our clients, and that would take time and caution.

Next, I anticipated that our clients would take advantage of the relaxed restrictions and would require even more metadata be input; for example, adding more names to bib records, and adding relationship terms, would be an increase in the time (=cost) of cataloging.

And I thought that our clients would want us to upgrade AACR2 records to RDA, which would add to the cost of copy cataloging.

Assumptions & Realities

Assumption: Cataloging in RDA will be more expensive than cataloging in AACR2.

1. So many options: we will have to learn different specs for different institutions (will make our process more expensive)

**Finding: Tentatively False
(We're already doing this with AACR2.)**



So let's look at these one at a time and report on what we found during the test.

First, with RDA, our clients would have so many options, we would spend a great deal of time managing all the different cataloging profiles.

We actually decided that this is likely false (although I haven't seen enough client Policy Statements yet to feel certain). We realized that currently most of our clients do follow LCRI, but others already have their own policies and practices, so that we already do have challenges with catalogers remembering what is a cataloging rule and what is a client preference. I expect that these variances from client to client will continue using either RDA or AACR2, and will have to be mitigated in any case (for example, we've found that it's helpful for us to not switch catalogers between projects if possible, but when at all possible have the same cataloger work on the same client's materials).

Assumptions & Realities

Assumption: Cataloging in RDA will be more expensive than cataloging in AACR2.

2. Relaxed restrictions means more metadata will be input into records

Finding: Tentatively True

Libraries can opt for a minimal level of cataloging, reducing costs – but not likely



I also wondered if RDA cataloging, by relaxing restrictions on the amount of data required for records, would mean that catalogers would be inputting more information and thereby raising prices - think of the relaxation of the Rule of 3, for example – now we could be inputting many more names than 3.

What we found was conflicting. While RDA gave more options to our client libraries than they were afforded under AACR2, the library could in fact choose to follow a less expensive option (more minimal), which might in theory lower their cataloging costs. My expectation, however, is that in the interest of better serving their patrons and users, libraries will lean towards increased access through increased description, and will tend towards MORE cataloging – not less. Our catalogers in the test confirmed that they were adding more metadata with RDA than with AACR2.

Assumptions & Realities

Assumption: Cataloging in RDA will be more expensive than cataloging in AACR2.

3. Upgrading AACR2 copy to RDA

Finding: Tentatively False

Many institutions indicated that they would accept AACR2 copy as-is, even in an RDA cataloging environment.



I assumed that our clients would want us to upgrade AACR2 copy to RDA. This assumption comes from the amount of copy editing and verification that we currently do for our clients – most of our clients require full editing of copy records.

Several of the test institutions, however, indicated during the test that they would accept copy records as-is, whether the institution used RDA or AACR2, and whether the copy records were RDA or AACR2.

Assumptions & Realities

Assumption: Cataloging in RDA will be more expensive than cataloging in AACR2.

Unforeseen cost:

Slowdown in cataloging due to lack of tools & examples and difficulty searching & organization of the RDA Toolkit.



The real slow-down (therefore cost) that we found in our RDA experience related to the RDA Toolkit, not the rules. AACR2 has a long history and is quite tied in with MARC format. At Backstage we have a tool we call our Stylebook, which allows our catalogers and technicians to find rules by MARC tag or by format. Our catalogers had a very hard time finding information in the Toolkit that was as comprehensive as what is available in AACR2 and current tools (our Stylebook, Catalogers Desktop), and what information they could find in the Toolkit was very difficult to find. Catalogers also complained about a lack of examples, or conflicting examples. If RDA is implemented fully, I expect that good examples and improvements to the Toolkit will grow over time. Prices for RDA cataloging might be higher initially while waiting for these improvements than they would be after RDA is more established.

Questions?

Backstage Library Works

