Chair’s Note

By Bie-hwa Ma

It is my honor and privilege to serve as the Chair of the Technical Services Interest Group (TSIG). I hope you found the TSIG and its activities helpful to your professional development. As in the past, TSIG Board continues to provide quality and affordable continuing education opportunities through the California Library Association (CLA) annual conference programs and Spring Fling workshops. No matter how drastic the changes the library associations have been through, TSIG’s commitment to serving its members’ needs remains the same.

The TSIG Board gathered program ideas primarily from the Membership Meeting during the CLA Annual Conference. The desired topics brought up were RDA, audiovisual cataloging, cataloging for Hebrew language materials, acquisitions/Licensing, electronic resources cataloging, integrated resources cataloging, and serials cataloging. With these options in mind, TSIG designed and sponsored successful programs consisting of the Beginning Serials Workshop, Serials Holdings Workshop, and New Development in Cataloging Practices Workshop in the CLA Spring Fling Program and proposed three CLA conference workshops including RDA, Rediscovering Our “Hidden Collections” (cosponsored with Collection Development Interest Group), and Cataloging Digital Media Workshop, a Preconference Institute. Since the CLA Programming Planning Committee could only approve the Cataloging Digital Media workshop as a three hour program instead of a six-hour one, Julie, the coordinator and presenter, and the TSIG Board decided to move the one-day institute to a Spring Fling program in Spring 2011. However, please take note of the workshops still planned for this fall: the CLA approved programs: “RDA” is scheduled on Saturday, Nov. 13, 2010, 7:45-8:45 a.m. and “Rediscovering Our Hidden Collections” on Monday, Nov. 15, 2010, 9:15-10:15 a.m. in the Sacramento Convention Center.

After many discussions and much effort, we had to hold off the Hebrew cataloging workshop due to lack of resources. As we understand the needs for Non-Roman language cataloging workshops, the TSIG Board will keep trying to sponsor such programs whenever possible. Some TSIG Board members suggested programs such as batch processing and tools (Macros,MarcEdit, etc.), music cataloging, metadata schemes other than MARC. Common workshop topics suggested by recent TSIG programs
Chair’s Note, cont.

participants were RDA, FRBR, cataloging of non-print formats (electronic resources, online databases, audiovisual materials), rare books cataloging, special collection cataloging, digital repositories; biannual update on cataloging changes, authority control, technical services management (personnel, workflows, processes), advanced serials, etc. The Board members have exchanged ideas with some potential presenters on some of the topics mentioned above. I have discussed with CLA and SCCTP of CONSER the possibility of sponsoring programs online. Please stay tuned on TSIG’s upcoming programs.

From the past Spring Fling registrations, we learned that most participants were non-members from diverse library backgrounds. TSIG Board members love to see our programs attracting so many non-members who may potentially become TSIG members. But on the other hand, does this indicate that the TSIG programs did not meet most TSIG members’ needs? I am sure there are interesting topics that have not been heard from both members and non-members. I strongly urge TSIG members to voice out your needs by proactively being involved in the Board or any TSIG activities. For non-members, I would like to invite you to join and give feedback to CLA TSIG in order for us to provide greater programs that meet your needs. A TSIG Membership Meeting provides you the best opportunity to express your expectation of TSIG. It is also a place where the major TSIG program ideas are generated. I hope to see you all at the coming Membership and Board meetings at the 112th CLA Annual Conference, scheduled on Sun., November 14 in room 201 from 2:00 to 3:15 p.m. at the Sacramento Convention Center.

The TSIG greatly appreciated CLA’s continuous funding of the New Leader Award to help and attract new professionals to be involved in the TSIG. The TSIG would like to recognize our CLA members in their outstanding achievement of technical services through the Technical Services Interest Group Award of Achievement. Nomination or application for both awards is usually due a month prior to the CLA Conference. Both award committees have proudly selected the 2010 winners. However, you could help distribute the upcoming announcements as widely as possible. The announcements will be posted through listservs or at TSIG’s Web site, <http://www.cla-net.org/aboutcla/acss.php> in August or September each year. For details, please see the announcements in this Tech-Notes.

I would like to thank my board members, Sarah Buchanan, Yu-Lan Chou, Mary Cohen, Ida Z. daRoza, Elaine Franco, Meredith Burke Hammons, Xiaoli Li, Julie Moore, and Sandy Schmitz not only for the excellent job they have done in their positions, but also for their support, advice, and help in running TSIG and my professional and personal growth. I was humbled by this wonderful, knowledgeable, experienced, persistent, creative, supportive, and most of all, enthusiastic group who put in tremendous effort to serve TSIG and the Board members. With such a great experience on a board like this, I am not afraid of taking any position in the group and would encourage you to join us to serve and learn in the meantime.

Join us at the CSLA/CLA 2010 Conference!
Reports

CLA Spring Fling 2010 Review

New Developments in Cataloging Practices

May 24th, 2010 at National University Library, San Diego

This workshop highlighted new cataloging practices recently developed by CONSER, BIBCO, or Library of Congress. It included CONSER standard records, Provider-Neutral records, BIBCO standard records, and Library of Congress form and genre headings represented respectively by Adolfo Tarango, Rebecca Culbertson, and Michael Colby.

Adolfo R. Tarango is currently Coordinator of Systemwide Collection Services at the University of California, San Diego. Adolfo is actively involved in the Program for Cooperative Cataloging, currently serving as Chair of the PCC Standing Committee on Automation, and in CONSER, having served on a variety of CONSER task groups. Rebecca Culbertson currently is Electronic Resources Cataloging Librarian of the Shared Cataloging Program at the University of California, San Diego and catalogs all resources of an electronic remote nature. Becky is actively involved in the Program for Cooperative Cataloging, currently serving as Chair of the PCC Standing Committee on Standards, and in CONSER, having served on a variety of CONSER task groups. She is also the coauthor of Provider-Neutral E-Monograph MARC Record Guide. Michael Colby, currently Assistant Head, Cataloging and Metadata Services Department, Shields Library, University of California, Davis, has nearly 30 years experience in academic and public libraries. He has also done reference, bibliographic instruction and collection development. He has been active in the American Library Association, the Music Library Association and the International Association of Music Libraries. In his spare time he plays music and worries about the future of access to information.

CONSER Standard Records (CSR)

The majority portion was dedicated to the most important changes due to CONSER’s adoption of the CSR, including the latest change from CONSER Operations Committee Annual Meeting, May 6-7, 2010. Mr. Tarango started with some introduction and background information: Learn where to locate CSR documentation; Learn of the reasons for development of the CSR; Learn the general principles behind and for employing the CSR. In the last session, Learn the basic editing guidelines, he touched on the CSR general principles and explained the changes in details with examples on the major changes including: Fixed field (006, 007, and others); Coding of indicators for 246 field; Authorized access points vs. transcription and/or notes; Limited use of differentiating uniform titles; Numbering statement in note format (362); Always a “Description based on” note; Always a source of title note (even if t.p.); Always a “Latest issue consulted” note; Standard abbreviations not required; related changes in 042 and 588 which was scheduled to be implemented after the Workshop on June 1, 2010.

At the end of the presentation, Mr. Tarango also added the new change of repeatable 260, although not part of CSR, which he considered an important development that applies to monographs and integrating resources as well. Pop quizzes were provided along the slides to help apply and understand the rules.

Provider-Neutral Records (P-N Records)

Ms. Culbertson talked about the definition of P-N records, the scope of P-N, where to find the standard, the difference from a non-P-N record, how to tell if a record is provider-neutral, when to use it, choice of records, how to use it, and OCLC’s role on merging records. She prepared a test.
Reports

CATALOGING cont.

BIBCO Standard Records (BSR)
Ms. Culbertson started with the definition of BSR. It could be only applied on printed monographs except for rare books. Then she proceeded to where to find the standard, who it applies to, how long it has been in effect, and how to use the standard and the printed handout of Metadata Application Profile (MAP). In the last session, information and timeline on BSRs for other formats in progress were covered.

Library of Congress Form and Genre Headings
Mr. Colby explained what form and genre is with simple examples. He then introduced the form and genre headings development history, thesauri used by Library of Congress, field 65x $v versus 655, recent developments of form and genre headings for moving images and radio, coming developments (cartography, law, religion, literature, and music) and their timelines, the reason for establish form and genre headings, current headings at work, LC policies of establishing form and genre headings, and LC application.

To view all the presentations, go to <http://www.cla-net.org/aboutcla/actss.php>.

Workshop Evaluation Results
There were 21 persons registered, 18 attended. Sixteen evaluations were returned. Below are the average satisfaction levels (with 5= excellent, 4= very good, and 3= good) in three areas.

To what extent did this workshop meet your professional expectations? 4.25
The overall quality of the speaker(s) presented materials was: 4.375
How well was the content targeted as your level of expertise? 4.0625
When asked the possibility of attending a CLA program in the future, 15 out of 16 participants answered yes. In general, this workshop received very positive evaluations from both new and veteran catalogers. Here are some highlights of the comments: helpful, specific, very organized, worthwhile, cost effective, good topics, timely and rich contents, wonderful presentation, good learning experience, great facilities, and outstanding food.

By Bie-hwa Ma

CLA Conference 2010:
CLA Interest Groups will be featured at the CLA membership booth with a "Spin the Wheel" activity which promises to be both informative and fun!
Make sure to visit the booth.
RDA Update (as of October 2010)

Resource Description and Access (RDA) was released on June 14, 2010, published as part of the RDA Toolkit <http://access.rdatoolkit.org> on June 23. Thousands of people tried out the RDA Toolkit during the 10-week open-access period which ended August 31, 2010. Highlights included "RDA instructions that are searchable and browseable, AACR2 Rule Number Search of RDA instructions, Workflows, mappings: tools to customize the RDA instruction set to support organizational training and processes, Two views of RDA content—by table of contents and by element set, and Full text of AACR2." Cataloging of test materials occurs from October 1-December 31, 2010. Formal evaluation by the national libraries occurs from January 1-March 31, 2011. The Joint Steering Committee (JSC) will next meet in March 2011. Issues they will deal with are enumerated in the document, "Issues deferred until after the first release of RDA," which is available on the JSC site <http://www.rda-jsc.org>.


The Co-Publishers for RDA (ALA, Canadian Lib. Assoc, and Facet Publishing of CILIP), Troy Linker, and the RDA Toolkit staff will present a webinar, "RDA Toolkit—What's new since August" over November 10-11, 2010. The webinar will feature a demo of "LCPS (Library of Congress Policy Statements)—now included in the RDA toolkit, Accessing and using globally and locally shared workflows, Creating and sharing your own workflows, Links from AACR2 to RDA, Using RDA Toolkit support, including new how-to videos, Discussion of future enhancements, and Q&A." View this webinar at http://www.rdatoolkit.org/training.

As reported on October 22 (Les Hawkins, CONSER Coordinator, Library of Congress), "The US RDA Test has been underway for several weeks now. Staff from the LC Policy and Standards Division and the LC Cooperative and Instructional Programs Division prepared the document “PCC Cooperative Cataloging during the US RDA Test.” The document provides information to PCC members about RDA records they will encounter during the test: http://www.loc.gov/catdir/pcc/RDA-Testing-PCC-Cataloging.pdf."

Ed.

CSLA/CLA 112th Annual Conference

Registrations Open! CLA and California School Library Association (CSLA) present a joint conference in 2010, under the theme 'Navigating the New: Charting the Future Together.' California librarians will have opportunities to attend both CLA sessions and CSLA sessions as well as preconference CLA Institutes and CSLA Workshops, area tours, and an Exhibit Hall. Register and plan your Conference with the full preliminary program at http://www.cla-csla.org/.

Follow the Conference discussion on Twitter with the conference hashtag #calibconf. CLA/CSLA has also created an interactive conference platform on Pathable where speakers and attendees can share their personalized conference schedule, meet new contacts on Twitter and LinkedIn, upload handouts and materials for participants, and share topical discussions. Sign up now at http://navigatingthenew.pathable.com/ and view a video on this social media platform at http://www.cla-net.org/weblog/2010/07/cla_partners_wi.php.

TSIG is sponsoring two CLA sessions in the Annual Conference, scheduled for November 13 and 15 at the Sacramento Convention Center. Join us as we discuss RDA and special collections cataloging topics!
CLA 2010 Preview

RDA (Resource Description and Access), the New Cataloging Code Has Arrived--Help!

RDA (Resource Description and Access), the New Cataloging Code Has Arrived--Help! will be presented on Sat., November 13, at 7:45-8:45 a.m. School, academic, and all librarians can attend this Saturday session ... some say RDA is the biggest change in cataloging since AACR2 was published over thirty years ago.

- Participants will learn the latest implementation plans for RDA.
- Participants will learn the differences in theory and practice between RDA and AACR2.
- Participants will learn the implications for local libraries, including issues of subscription fees, staff re-training, revised workflow, etc.
- Participants will learn about opportunities for RDA training, especially training developed for regional and electronic dissemination.

Presenters: Chamya Kincy (Life and Social Sciences Cataloger, Cataloging & Metadata Center, University of California, Los Angeles), and Luiz Mendes (Electronic Resources Librarian, California State University, Northridge). Moderator: Elaine Franco (Principal Cataloger, University of California, Davis).

[Operations track, sponsored by TSIG]

Rediscovering Our Hidden Collections: Maximizing Staff Skills and Technology to Enhance Access to Special Collections

Rediscovering Our Hidden Collections: Maximizing Staff Skills and Technology to Enhance Access to Special Collections will be presented on Mon., November 15 at 9:15-10:15 a.m. Hear how improved access leads to increased use and facilitates patrons’ research.

- Within the context of national initiatives, participants will learn best practices for providing access to special collections materials.
- Participants will learn how including and training additional levels of staff has accelerated special collections cataloging.
- Participants will become aware of possibilities for national/global collaboration on special collections cataloging through OCLC WorldCat.
- Participants will learn how enhanced access has led to enhanced use of special collections.

Presenters: Elaine Franco (Principal Cataloger, University of California, Davis), Sarah Buchanan (Cataloger, Rare Books Project, University of California, Los Angeles Library), John Sherlock (Rare Books Librarian, University of California, Davis).

[Operations track, co-sponsored by TSIG and Collection Development Interest Group, CDIG]

TSIG Board Members will present two awards at the CLA Membership Meeting and Awards Presentation, on Sun., November 14 from 10:00 a.m.-12 p.m. The 2010 TSIG Award of Achievement is chaired by Ida Z. DaRoza and the 2010 TSIG New Leader Award is chaired by Sandy Schmitz.

Join TSIG at our Membership Meeting at 2:00 – 2:30 p.m. on Sun., November 14 in room 201 at the Sacramento Convention Center. Consider an officer position in TSIG! Immediately following will be a Board Meeting from 2:35 – 3:15 p.m.
CLA TSIG Call for Nominees

Technical Services Interest Group (TSIG) Award Of Achievement

The Technical Services Interest Group of the California Library Association is seeking nominations for the Technical Services Interest Group Award of Achievement to acknowledge superior achievement by an individual in those areas of the library profession that encompass technical services.

All members of the library community are invited to take this opportunity to recognize deserving technical services colleagues who have made significant contributions in those areas of librarianship that have been especially challenged by the need for innovation and adaptation in dealing with rapidly changing technology and work environments.

The Technical Services Interest Group Award is available each year to a qualified recipient identified by the TSIG Award Committee. The award committee must consider only those individuals who have been formally nominated, but is not required to name an award winner each year. The award was established in 1997 and has been presented almost every following year.

Although there are no restrictions regarding who may nominate a candidate for the award, the following restrictions apply to potential award recipients:

ELIGIBILITY:
1) Nominee has worked for a portion of the past year in a California library.
2) Nominee is a member of the California Library Association.

CRITERIA FOR SELECTION are outstanding achievements in one or more of the following areas:
1) Leadership in professional associations at the local, state, regional, national, or international level.
2) Significant contributions to the development, application, or utilization of new or improved methods, techniques, and routines demonstrating creativity and innovation.
3) Significant contributions to the professional literature.
4) Significant studies or research.

To nominate an individual, please provide the following information about the nominee:

NAME           PHONE
CURRENT TITLE  EMAIL
ADDRESS

Submit a statement (no more than 350 words) in which you identify the achievement(s) for which you recommend the award to be presented to this individual, and briefly describe the impact of the achievement(s) on those areas of the library profession that encompass technical services. Include your own name, phone number, and email address.

Please send your nomination via email message or email attachment to:

Ida Z. daRoza
daroza@smcl.org

DEADLINE IS FRIDAY, OCTOBER 15, 2010.

The award will be presented at the 2010 California Library Association Conference, to be held in Sacramento November 12-15, 2010.

For more information about the CLA Technical Services Interest Group, including a list of past award recipients, see the website: <http://www.cla-net.org/aboutcla/actss.php>

For any other questions about the Technical Services Interest Group Award of Achievement, contact:

Ida Z. daRoza
San Mateo County Library
daroza@smcl.org
CLT SIG Call for Nominees

Technical Services Interest Group (TSIG) New Leader Award

Up to $500 is available to be awarded to the successful applicant to help cover registration, travel, and lodging expenses for attending the CLA Annual Conference in Sacramento from November 12-15, 2010.

Criteria:
- Be a current California Library Association member, or join by application deadline.
- Have no more than five years of post-MLS library experience OR have recently received MLS OR be currently enrolled in an MLS program.
- Be able to attend CLA Annual Conference and work virtually in between.

Requirements:
- Attend CLA Technical Services Interest Group Membership Meeting and one or more TSIG programs at CLA Annual Conference.
- Report on Technical Services Interest Group program(s) and/or overall conference experience for Technical Services Interest Group newsletter.
- Be willing to serve on a Technical Services Interest Group committee or taskforce, or as a candidate for Technical Services Interest Group office, following the CLA Annual Conference.

To apply:
Submit a brief statement (no more than 350 words) describing career goals and interest in Technical Services and the CLA Technical Services Interest Group via email message or email attachment (preferred) to:

Sandy Schmitz
sandy.schmitz@ventura.org

DEADLINE is Friday, October 15, 2010.

You may include your curriculum vitae or résumé in addition to the professional interest statement, but that is not required.

For more information about the CLA Technical Services Interest Group, see the website:
<http://cla-net.org/aboutcla/actss.php>

For more information about the California Library Association, CLA membership, and the upcoming CLA Conference, see the website: <http://www.cla-net.org>
Library students and first time members are eligible for reduced dues. Students, support staff, and unemployed librarians are eligible for reduced conference registration fees.

For any other questions about the Technical Services Interest Group New Leader Award contact:

Sandy Schmitz
Technical Services
Ventura County Library
sandy.schmitz@ventura.org
(805) 641-4449
fax: (805) 641-4444
CLA News


CLA will present over 150 career development sessions at the 2010 Conference. The CLA conference planning committee, chaired by Dana Christy (Yolo County Library) received 218 session proposals. Be sure to catch the keynote presentations by authors Marilyn Johnson and Steven Berlin Johnson, Infopop-sponsored speakers Brian Ferren and Thomas Kelley, and discussion leader Joan Frye Williams. Read more in CLARION 6.2 (Oct. 2010) and at California Libraries, <http://www.cla-net.org/weblog/2010/05/update_conferen.php> and <http://www.cla-net.org/weblog/2010/03/call_for_presen.php>.

The CLA Leadership Development Committee has announced the election of 2010-2011 officers. Elected Vice President/President Elect is Wayne Disher (Director, Hemet Public Library), and Board of Directors members are Tracie Carignan (Library Manager, Riverside County Library System) and Beth Wrenn-Estes (Instructor, San José State University School of Library & Information Science). Read more at California Libraries, <http://www.cla-net.org/weblog/2010/10/2010_ela_electi.php>.


The first "Choose Privacy Week" was held from May 2-8, 2010 at libraries nationwide. Read more at California Libraries, <http://www.cla-net.org/weblog/2010/04/firstever_choos.php>.

National Library Week and National School Library Month (ALA AASL) were celebrated in April 2010.

*Did you know:* CLA (est. 1895) and CSLA (est. 1915) presented a joint conference in 1988, and also from 1995-2000.

For information on ALCTS continuing education offerings, see the ALCTS home page at http://www.ala.org/alcts; CRG tweets at @alcts_crg_ce.

ALCTS will host a webinar, "RDA: Benefits for Users and Cataloguers," presented by Christine Oliver (McGill University Library) on Wed., November 3, 2010 starting at 11 a.m. Pacific time for a one-hour session.

ALCTS will host a webinar, "Don’t Tilt at Windmills: An Active Learning Approach to Teaching FRBR," on Wed., December 1, 2010 starting at 11 a.m. Pacific time for a one-hour session presented by James P. Ascher and Peter J. Rolla (both of University of Colorado at Boulder).

ALCTS hosted a webinar, "Using Web 2.0 Applications in Technical Services," presented by Julie Swierczeck (Salve Regina University) on Wed., September 29, 2010 starting at 11 a.m. Pacific for a one-hour session.

ALCTS hosted a webinar, "Introduction to RDA," on Wed., September 22, 2010 starting at 2 p.m. Pacific for a one-hour session with Robert Ellett (Joint Forces Staff College, Virginia).

ALCTS hosted a webinar, "Continuity of Operations after a Disaster," presented by Nancy Kraft (University of Iowa Libraries) on Wed., August 18, 2010 starting at 11 a.m. Pacific for a one-hour session.

ALCTS hosted a lively e-forum discussion, "Preparing Your Library for RDA" on September 14-15, 2010, presented by Mary Beth Weber (Rutgers University Libraries) and Christopher Cronin (University of Chicago Libraries). Visit <http://lists.ala.org/sympa/info/alcts-eforum> for more information, and view the discussion summary prepared by the presenters on Sept. 23 (and sent by Elaine Franco) at the end of this issue of TechNotes.


The ALA Voting Representative to NISO (currently Cindy Hepfer, SUNY at Buffalo), appointed by ALCTS, solicited feedback due October 29 about four ANSI/NISO standards up for review and reaffirmation. Reviewed by the NISO Content & Collection Management Topic Committee, the four standards in question are:


SLA Southern California Chapter will present its fall program "A Celebration of Librarianship and the Information Profession" and awards dinner on Wed., November 10, 2010 at 5:30 p.m. Panelists Jean Crampon, Cindy Mediavilla, and Dorothy McGarry, and moderator Richard Hulser will speak at the LA84 Foundation. For more information, please see the SLA-SCC Web site at http://www.sla-scc.org/.
2009-2010 TSIG
Board of Directors

Chair
Bie-hwa Chen Ma
Chinese Electronic Resources
Cataloging Librarian
UC San Diego Libraries
9500 Gilman Dr, 0175K
San Diego, CA 92093-0175
Ph: 858-822-3877
Fax: 858-822-0349
bcma@ucsd.edu

Vice Chair/Chair-Elect
Sandy Schmitz
Head of Technical Services
Ventura County Library
196 S. Fir Street
Ventura, CA 93001
Ph: 805-641-4449
Fax: 805-641-4444
Sandy.Schmitz@ventura.org

Past President
Ida Z. daRoza
Catalog Librarian
San Mateo County Lib. System
125 Lessingia Court
San Mateo, CA 94402
Ph: 650-312-5255
daroza@plsinfo.org

Secretary
Yu-Lan Chou
Manager, Data Profiling Services
Innovative Interfaces, Inc.
5850 Shellmound Way
Emeryville, CA 94608
Ph: 510-450-6363 x2318
Fax: 510-450-6350
ychou@iii.com

ALCTS/CRG Representative
Elaine Franco
Principal Cataloger
Shields Library
University of California, Davis
100 North West Quad
Davis, CA 95616-5292
Ph: 530-752-9924
Fax: 530-754-8785
eafranco@ucdavis.edu

Meredith Burke Hammons, Ph.D.
Circulation Supervisor, Collection Services
San Mateo County Library
125 Lessingia Court
San Mateo, CA 94402
Ph: 650-312-5255
Fax: 650-312-5382
hammons@smcl.org

Chair of Program Committee
Xiaoli Li
Head, Cataloging and Metadata Services
Shields Library
University of California, Davis
100 North West Quad
Davis, CA 95616-5292
Ph: 530-752-6735
Fax: 530-754-8785
xlii@ucdavis.edu

Spring Fling Coordinator
Mary Cohen
Palos Verdes Library District
Technical Services Department Manager
701 Silver Spur Rd.
Rolling Hills Estates, CA 90274
Ph: 310-377-9584 x 242
Fax: 310-541-6807
mcohen@pvld.org

We’re Online!

Call for Submissions!
Contribute to the next issue of TechNotes! We encourage submissions for our biannual newsletter addressing any aspect of librarianship. Please address your submissions to co-editors Meredith and Sarah, at hammons@smcl.org and sarahab@ucla.edu respectively, by Mar. 31 for inclusion in the Spring 2011 issue. Prior issues of TechNotes are available at the Web site http://www.cla-net.org/aboutcla/technotes.php.
Day 1 of the e-forum focused on "Administrative, Policy, and Implementation Decisions for Adopting RDA" and “RDA Training and Education”.

Administrative, Policy and Implementation Decisions for Adopting RDA

Many of the participants indicated that they’re not testers and are waiting for the recommendations by the U.S. national libraries following the conclusion of RDA testing.

A few participants said their administration is supportive of investigating RDA at the local level. Others questioned whether this is the right time to adopt a new cataloging code with shrinking staff and budgets.

There was discussion of using the RDA Toolkit. A number of participants used it during the open access period. Some participants were unsure if they could afford the Toolkit, and one person noted her institution may have to choose between Classification Web and the RDA Toolkit. Others will be considering purchasing the print version of RDA in lieu of the online version.

There was good response to the question [which is paraphrased here] “If your institution is not testing RDA or creating RDA records, what would you like to learn from those who are doing so?” Responses included:

- learning whether a common set of best practices evolves from those institutions currently testing RDA
- how will RDA change the way one catalogs using OCLC’s Connexion. How will it look? Will templates change?
- how will RDA affect our copy cataloging practices (if at all)?
- how one can learn about RDA by being able to base it on what some catalogers have mastered for the last 20 years, AACR2R?
• concern was raised about the new 3xx fields (336, 337, 338): how to implement, use, and display them in one’s ILS and when they should be applied.

RDA Training and Education

Several participants expressed concern about competing priorities. Particularly at a time when technical services are being cut at many institutions, it is difficult to justify the expense of learning and implementing a new cataloging code. Smaller institutions, especially school libraries, articulated concerns about opportunities for training that will help institutions with fewer financial and human resources.

Many institutions said they will not be performing formal training prior to a decision on adoption is made by the national libraries. Others are taking "learn as much as you can" approach, watching how the RDA testing progresses.

Participants discussed how they’ve educated themselves about RDA. This ranged from attending conference presentations, subscribing to RDA-L and participating in discussions on lists (AUTOCAAT, RDA-L), webinars, etc. Many participants noted that free educational opportunities are preferable, given the current economy. Some participants began training their staff on FRBR and FRAD, then moved to RDA.

One institution holds regular weekly meetings to discuss their experiences using the RDA Toolkit and applying RDA concepts.

There was a question regarding shared workflows in the RDA Toolkit, which seems to include people’s test workflows. The person who raised this question also wanted to know if it’s possible to control shared workflows at an institutional level. [This question was sent to ALA Publishing and this is the answer that was provided: Workflows can be restricted to private, subscription, or public.] The Library of Congress is making their sample workflows available so everyone else can see how they’re using the Toolkit.

To limit a workflow, select “share mode” when you’re creating it. The choices are private, subscription, public. Workflows are available for future use under the subheading “Your workflows” in the Workflows section.

Several current or recent library school students summarized the role RDA has played in their cataloging courses and graduate programs. Some educators responded, indicating various levels of emphasis on RDA in the courses they teach. Catalogers and administrators wrote that exposure to the theoretical/conceptual models behind the rules -- FRBR and FRAD in particular -- is appropriate, and that hands-on training for applying RDA could be provided on the job. Also noted was that for new catalogers, RDA could be the only standard they knew. A lot of training is focusing on the similarities and differences between RDA and AACR2, but what should education and training look like for those who haven’t cataloged before? The importance of including
some GSLIS programs as part of the U.S. RDA test was emphasized as a mechanism for other programs to learn from their experience.

**Day 2 of the e-forum focused on "Impact of RDA on Systems & Vended Processes" and "Assessment of RDA Metadata"**

**ILS vendors and how they’ve prepared to accommodate the transition to RDA**

Participants responded about their respective vendors. It was noted that initial implementation of RDA within our current cataloging infrastructure based on MARC should only be considered the first step in the transition.

There were questions raised about a number of systems and the majority of responses were about Sirsi/Dynix, ExLibris, Innovative, and there was a response about Polaris. Information about individual ILS vendors is based on responses provided during the e-forum, so libraries who are customers of a particular vendor are encouraged to contact them for additional information.

Sirsi/Dynix: Will begin working to update their ILS systems to support RDA and FRBR. Symphony customers have customized format policies and it’s not possible to load a new version of the policy tables. They are required to add new fields to 9 bibliographic format policies and (up to) 14 authority format policies. Many Sirsi libraries have limited index keys available for indexing of new fields.

ExLibris: ExLibris updates the tag tables periodically with releases of the software especially when there are major releases, although individual libraries can update their tag tables as needed. Individual libraries also control their own OPAC displays.

Innovative: Innovative has provided a FAQ about RDA for customers.

Polaris: Will implement RDA on build 4.4.

A question was raised about how RDA will work with finding aids. The Archivist’s Toolkit was cited as a means for creating EAD finding aids and mapping them to MARC.

**The role of reference and public services personnel in assessing the a value and benefit of RDA**

One respondent replied that patron feedback should be considered since catalogs are useless if they don’t enable patrons to locate what they’re seeking.

Public services’ input was also noted as they serve on the front lines. A good deal of cataloging treatment is determined by input from public services.

**Types of things that should be included in RDA testing**

In regards to testing, responses included:
• ease of finding items and employing different search strategies.
• How easy it is to find an item.
• Try different search strategies and see how well they pull up the desired results.
• Have patrons try to find the items and see how well they do.

There was discussion about consideration of non-MARC schema being included in RDA testing. It was reported that institutions are also testing Dublin Core, MODS and MARCXML.

Although the following topics were discussed on Day 1, and there was additional discussion (provided below) on Day 2.

**Potential authority control conflicts between AACR2 and RDA headings.**
Although authority control was discussed on day 1, there was a good deal of discussion of this topic on day 2:

Concern was raised regarding authority conflicts for subject, name, and title, particularly during transition from AACR2 to RDA, particularly the potential for the revision of abbreviations to wreck havoc on existing authorized forms of headings.

The difference between RDA’s ability to control headings and current practices were discussed. RDA will enable catalogers to record data more precisely in a manner that will help differentiate the names of people and agencies that currently are chiefly differentiated by heading strings. The promise of linked data to streamline workflows and to provide disambiguation pages to provide differentiating data for names was also discussed.

Desire for a clearer vision of how AACR2 authorities and RDA authorities relate to each other was articulated. [In the days following the e-forum, LTI posted a statement to their website regarding RDA implementation and LTI’s services.]

**Training tips**
A discussion of training tips, which began on day 1, continued on day 2. Respondents noted that they have created RDA records in their test systems, have held regular meetings at their institutions, and have taken advantage of presentations, web sites, etc. to stay informed. Adam Schiff’s documentation and LC’s Policy Statements were cited as helpful resources. One respondent noted her institution is examining RDA core elements in conjunction with LC Policy Statements.

**Resources**
Links to resources cited during the course of the e-forum discussion, as well as others, are provided below:
FRAD
FRBR
http://www.ifla.org/VII/s13/frbr

FRBR blog
http://www.frbr.org/

Joint Steering Committee for the Development of RDA
Presentations on RDA
http://www.rda-jsc.org/rdapresentations.html
RDA-L (discussion list)
http://www.rda-jsc.org/rdadiscuss.html

Library of Congress
Documentation for the RDA (Resource Description and Access) Test
http://www.loc.gov/catdir/cpso/RDAtest/rdatest.html (includes the timeline for testing, test partners and select partners: systems, rules, formats)
LC RDA test examples
http://www.loc.gov/catdir/cpso/RDAtest/books.doc

North Carolina State University RDA training documentation
https://staff.lib.ncsu.edu/confluence/display/MNC/RDA+Test

OCLC’s “About RDA” page (RDA resources and RDA-related resources from OCLC, including the policy statement on RDA cataloging in WorldCat)

RDA in MARC (May 2010)
http://www.loc.gov/marc/RDAinMARC29.html

Schiff, Adam Changes from AACR2 to RDA: A Comparison of Examples
http://eprints.rclis.org/18368/1/BCLAPresentationWithNotes.pdf

Shrader, Tina. “Overview of the U.S. RDA test”

University of Chicago Library
Davis, Renette, “Preparing for RDA testing at the University of Chicago”
http://presentations.ala.org/index.php?title=Monday,_June_28#ALCTS_CRS_Co
ntinuing_Resources_Cataloging_Committee_.28CRCC.29_Monday_Update_Foru
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Resource Description and Access (RDA) Testing at the University of Chicago Library
http://www.lib.uchicago.edu/staffweb/depts/cat/rida.html