

## OhioLINK RDA Study Group

### Report to DMSC

April 2011

The OhioLINK RDA Study Group has been meeting regularly with phone conference calls for the past four months. A preliminary report was given at the January 2011 DMSC meeting. Members of this group are:

Jeffrey Trimble, YSU, Chair	Roman Panchyshyn, KSU	Jenny Kunkler, ONU
Morag Boyd, OSU	Sevim McCutcheon, KSU	
George Johnston, UC	Tom Adamich, Muskingum	
Misha Misco, Miami	Richard Wisneski, CWRU	

To refresh DMSC members, the following is the charge given to the Study Group:

1. To ensure that the central III system is prepared to fully accept and utilize RDA records, including indexing of new MARC fields as appropriate. Recommendations and instructions will be provided to Lead Implementors. This also includes creating recommendations for display and labeling of new/changed MARC fields, which would be passed on to USC.
2. To discuss implications of RDA implementation on OhioLINK catalog functionality, and OhioLINK cataloging policies. The group should also address implications of non-implementation, in case we have members that choose not to adopt RDA.
3. To help individual institutions analyze workflow and other implications of local implementation of RDA, and to identify training/resources, and/or offer training to OhioLINK members.

**Summary Recommendation:** Due to the fact that the Library of Congress has not yet issued its final report on the testing of RDA, we are not able to make a definitive recommendation at this time. What follows are preliminary recommendations based on the data we have available to us at this time. We also recommend that this Study Group be kept in place until LC's final recommendations are published, so that we may make final recommendations for OhioLINK based on LC's final report.

The recommendations are based on the aforementioned charges:

1. The central III system and all local III systems are already able to accept RDA data. The follow additional steps will need to be taken, and it should be no charge to the customers according to III:
  - a. Loading of records. III has provided a Service Commitment that will update Load Profile Tables for anyone who needs this. For those institutions that have

staff with Load Profile Training, they already have the capabilities to make those changes.

- b. OPAC Displays. The capability is already available. We recommend that the USC be involved in this issue and determines what will and will not be displayed.
  - i. The change in the structure of the [GMD] appearing in the title proper (MARC21 245 tag) is now placed in the 338 field. These may now have no practical meaning the to end use, but until icons are available, we will recommend its display with an informative label. The lack of a GMD in the 245 makes it difficult for users to identify electronic resources searching title indexes.
  - ii. MARC21 tags 336, 337 are difficult to divulge as to what their meaning is to the neophyte end user, so we would recommend they be suppressed from display.
  - iii. Many of the MARC21 displays now have \$2 with rda symbolic data contained therein. These would need to be singled out and suppressed from display. This is not difficult to do in the III environment.
2. OhioLINK catalog and cataloging policies will need to accommodate the acceptance of both AACR2 and RDA records (including related authorized headings), at least for the immediate future. Following along with OCLC interim RDA guidelines <http://www.oclc.org/us/en/rda/policy.htm> we think OhioLINK could offer similar guidelines to avoid duplicates based only on code used for cataloging:
  - a. When performing copy cataloging, catalogers may LOCALLY edit records created under any rules to another set of rules. Please do NOT replace the master record for this purpose. □
  - b. If a record created according to either AACR2 or RDA already exists in WorldCat, please do NOT create a duplicate record according to the other code. □ Mainly, we want to avoid duplicates based on cataloging codes.
  - c. We recommend that Library of Congress Policy Statements be the foundation of OhioLINK cataloging guidelines [http://www.loc.gov/catdir/cpsr/RDAtest/rda\\_lcps.html](http://www.loc.gov/catdir/cpsr/RDAtest/rda_lcps.html)
  - d. We need to be ready to respond to the RDA recommendation from the Library of Congress which would be one of the following options, or something else:
    - i. Do not implement RDA
    - ii. Postpone pending certain changes
    - iii. Implement RDA
    - iv. Implement RDA with specific changes/policy decisions
  - e. We predict that adoption of RDA with specific changes/policy decisions, either immediately or after those changes are made, is the most likely outcome, so it is hard to plan without knowing what those recommendations will be.

3. Currently, a survey is underway to get an idea of what the impact of the implementation of RDA will have on institutions across OhioLINK.
  - a. Training will be paramount in OhioLINK. Several models may be of use to us
    - i. OhioLINK hosting trainers from LC/PCC at several sites in Ohio.
    - ii. Train the trainer techniques. Where several staff from libraries in OhioLINK will get the necessary training and then be trainers for other institutions in OhioLINK.
    - iii. Web training courses for libraries in remote areas of the state. (Live and archived)

***Final Thoughts.*** While it seems that there are lots of unknowns, we do know that RDA is perhaps a radical change from the past practices, yet in some ways, returns us to AACR1 familiarity. (e.g. the fullest form of the name, or more detailed description). What is important for librarians across the state that if RDA is implemented, “the sky will not fall”, and systems will not break, and we will continue to provide information to our users. This will mean that we will be in a time of transition. OhioLINK as a whole, must be agile enough to quickly adopt changes due to RDA implementation.