

Alexander C. Kyrios. The RDA Revolution: Professional Reactions to Resource Description and Access. A Master's Paper for the M.S. in L.S degree. April, 2011. 50 pages. Advisor: Kristina Spurgin

Since 2005, when the in-development AACR3 was rechristened Resource Description and Access (RDA), the academic cataloging community has become sharply divided based on the perceived merits and shortcomings of the emerging standard. Some opponents have argued that tweaks could have kept AACR2 relevant in the digital age, while others dismiss RDA as too similar to AACR2 and too firmly grounded in a card catalog model. RDA's supporters contend that it will be an important step forward, helping lead to a post-MARC cataloging environment. This paper examines this range of opinions expressed by professional academic catalogers and seeks to identify some of the reasons this debate has often flared tempers and led to personal resentments. The paper will review published literature on the topic, feature interviews with five professional catalogers, and analyze a survey conducted by another cataloger. Analysis reveals more common ground among these differing parties than may have been expected.

#### Headings:

Anglo-American cataloguing rules

Cataloging/Rules -- Resource description and access

College and university libraries

Librarians -- Technical services librarians -- Catalogers

MARC system

THE RDA REVOLUTION: PROFESSIONAL REACTIONS TO RESOURCE  
DESCRIPTION AND ACCESS

by  
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A Master's paper submitted to the faculty  
of the School of Information and Library Science  
of the University of North Carolina at Chapel Hill  
in partial fulfillment of the requirements  
for the degree of Master of Science in  
Library Science.

Chapel Hill, North Carolina

April 2011

Approved by

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## **Introduction**

Since 1978, librarians in most of the English-speaking world have cataloged materials in accordance with the standards of the second edition of the Anglo-American Cataloging Rules (AACR2). While AACR2 has been amended and revised periodically since then, most cataloging work today strongly resembles that of thirty years ago. In 2004, library leaders from AACR's Committee of Principals began work on AACR3, a full update to the aging standards. But in 2005, the professionals drafting AACR3 decided to shift their focus, rechristening AACR2's proposed successor as Resource Description and Access (RDA). Work continued on RDA until its publication in June 2010 in the form of the web resource RDA Toolkit. Print editions followed.

Professional catalogers reacted to RDA as proposed in radically different ways. Some saw it as a strong step forward for the cataloging community, and a necessary act of progress that ensures the relevancy of traditional cataloging in a burgeoning digital landscape. Many others were not so happy. Opponents of RDA fall mostly into two categories. The first believes that RDA's Joint Steering Committee (JSC) has badly overreached. Few would argue (indeed, I am not aware of anyone who has done so) that AACR2 was a perfect document; its limitations and problems have been widely recognized. Rather, some catalogers simply expected AACR3 and received RDA. For them, the JSC was guilty of "mission creep," to borrow a military phrase. The other primary opponents of RDA believe precisely the opposite—that RDA remains too grounded in the cataloging practices of the past, and that RDA is simply AACR3 with a

name change. This latter group does not necessarily oppose implementation of RDA, but this has not stopped them from vocal criticism directing how they believe the cataloging community must proceed from RDA.

Perhaps the single most consequential change from AACR2 to RDA is the latter's use of the Functional Requirements for Bibliographic Records (FRBR) as a conceptual foundation. First introduced in 1998, FRBR presents an entity-relationship model separated into three main groups. Group 1 describes the relationship between related intellectual works, Group 2 describes the personal and corporate authors involved in the creation of the Group 1 entities, and Group 3 describes subjects of Group 1 products, such as concepts, events, or people.

While some professionals have praised the FRBR model, others point to flaws such as the uncertainty involved in distinguishing its Group 1 entities (work, expression, manifestation, and item) and their bias toward literary and monographic materials. Still others have observed the incompatibility of FRBR with the MARC (Machine-Readable Cataloging) metadata format which has dominated cataloging since it first replaced the traditional catalog cards. This realization further divides catalogers, and ultimately comes down to a question of cost versus benefit: Is the promise of FRBR-based RDA benefits sufficient to undergo the cost of overhauling or replacing a worldwide standard like MARC?

Unfortunately, incivility has characterized some of the debates about RDA within the cataloging community, frequently defying the stereotype of the mild-mannered librarian. Fascination with the levels of passion with which some have approached these questions has led me to this study. To briefly acknowledge some of the most extreme

positions, RDA opponents have accused its proponents of conspiring to unilaterally impose untested ideas, having initially promised only an update of AACR2. RDA's supporters, on the other hand, regard these opponents as Luddites whose refusal to adapt to a changing environment will lead to no less than the death of cataloging. These positions, while extreme, offer some insight into the tempestuous nature of some of the corresponding debates, and speak to the fears and anxieties broadly felt by today's catalogers. We sense that some degree of adaptation will be necessary to secure the future of cataloging, but some also fear a lack of opportunities for input toward these new solutions.

Given the uncertainty with which some regard FRBR and RDA, it is hardly surprising that controversy has developed, as some catalogers have reacted strongly against the proposed implementation of RDA, which once appeared to be inevitable. The Library of Congress oversaw an initial RDA test period, during which select institutions began cataloging based on RDA standards, in 2010. A final decision on the future of RDA, expected after this test period, has not been made as of this writing. Currently, the Library of Congress has joined with the National Library of Medicine and the National Agricultural Library to further test the efficacy of RDA, and has promised a report to the US library community after the end of this testing on March 31. Creation of this report is likely to command enough time such that an announcement is unlikely before the annual conference of the American Library Association in late June of this year.

## Literature Review

Professional reaction to the proposed RDA standards has featured frequently in trade magazines as well as opinion pieces in scholarly journals since well before the JSC released its final draft. Most commentators on both sides of the issue recognize the revolutionary potential of RDA, but this agreed-upon principle has not always led to accord. Critics have most often found fault with RDA by claiming it strays too far from the established standard of AACR2, but many others have also complained that it does not go far enough.

During the course of compiling this literature, I found it fascinating to observe how expressed opinions on RDA shifted as the standards became clearer. As someone relatively new to the field of library science, I was also amused to find older materials predicting the implementation of RDA coming years ago: “*Resource Description and Access* (RDA) is scheduled to replace the AACR2 cataloging code in 2008” (Jones & Carr, 2007, p. 281). Some apparent inconsistencies in opinion stem from the continuing development of RDA—both internally and in terms of its public perception—and speak to the difficulties of coming to judgments on ongoing projects.

Besides stated opinions for or against RDA, I have reviewed some primers for catalogers regarding the anticipated shift from AACR2, some explorations of RDA’s interaction with RDA and MARC, as well as other sources which attempt to provide a descriptive account of the ongoing controversy. Taken together, these publications and presentations demonstrate a clearly divided cataloging community, though not one without prospects for reconciliation or the establishment of common ground.

## Major Changes from AACR2 to RDA

As a replacement for AACR2, RDA “aims to provide a new standard for resource description and access that is designed for the digital world and that provides a comprehensive set of guidelines and instructions covering all types of content and media” (Jones & Carr, 2007, p. 283-284). It intends to “enable users to find, identify, select, and obtain resources appropriate for their information needs” (p. 284). Questions about the extent to which RDA succeeds in these goals and facilitates these user needs underlie virtually all of the present debates about it. Before examining these debates in greater detail, a brief overview of what exactly RDA changes from AACR2 will help to illuminate the perspectives of participants in these debates.

Some of RDA’s changes are semantic, in which “popular cataloging expressions that have existed for decades are replaced” (Ehlert, 2010a, p. 19). These include “main/added entry” in AACR2 to “access point” in RDA, and “uniform title” in AACR2 to “preferred title” in RDA (p. 19). Ehlert also remarks on structural differences between AACR2 and RDA documentation. Whereas AACR2 features “descriptive rules in format-specific chapters... correspond[ing] to the ascending numbering of the MARC tags in a bibliographic record” (p. 20), in “RDA elements (and rules for these) are grouped not by how they stand together in a record, but how they relate to one another in a FRBR/FRAD [Functional Requirements for Authority Data] context” (p. 20). Ehlert argues this reflects not just a superficial change, but a conceptual shift:

In effect, RDA is a *content standard*; its only concern is with the data itself, not with how it is served on the screen or card to the catalog user. Already RDA forces us to think in a way different than how we are accustomed. (p. 20)



In part due to a need to describe non-print resources organized very differently from traditional print books and serials, RDA represents an attempt “to focus on the content and less on the form or format that the content takes” (Knight, 2011). To that end, “the GMD (general material designator), which in AACR[2] appeared in square brackets after the title proper, will be replaced with three new data fields: the media type; carrier type; and content type” (Knight). For that most traditional of formats, the print book, a resource would be described as *unmediated* media type (in that no device beyond the book itself is necessary for access), *volume* carrier type (from a list of terms), and *text* content type (Ehlert, 2010b). This shift away from the set vocabulary of GMD seeks to allow expression of formats not yet imagined. In this sense, RDA “is built not so much for the present as for the future” (Ehlert, 2010b, p. 16). Perhaps in anticipation of applications beyond library science, or at least beyond MARC, “RDA seems more at home on a system where a cataloger plugs information into a series of blank text boxes rather than devising MARC records into which that same data is sometimes shoehorned” (p. 16).

Of course, this section should not be taken as an exhaustive list of changes in RDA from AACR2; rather, I intend it as a quick look at some of the more far-reaching changes applicable to the everyday work of most catalogers. Other consequential changes include a strong preference against abbreviation (Jones & Carr, 2007, p. 286), shifts in biblical naming conventions, and access points for treaties (Sanchez, 2010, p. 54-55). However, changes in terminology, organization, and representation of formats reflect some of the major conceptual shifts that characterize RDA and have led to some of the most disagreement among professionals.

## **Support for RDA**

The most common conviction among RDA supporters seems to be the idea of the standards “as a ‘bridge’ that strives to connect our past with our future” (Knight, 2011). Much of the praise of RDA hails anticipated future benefits, such as “opportunities for system vendors to develop new features in OPACs” (Chapman, 2010, p. 213), and matching criticism of AACR2 as inadequate for present and future needs: “This is a very different world from when libraries permanently acquired, by purchase or subscription, physical items to which they controlled the access” (p. 211).

Catalogers on both sides of the RDA debate have remarked on the limited compatibility of MARC with RDA. “It may well be that the current model of working directly within a MARC-based template will be the most obvious change” from implementation of RDA, “given that MARC cannot at this stage cope with the separation of FRBR Group 1 entities” (Hillmann, 2007, p. 12). For supporters of RDA, this is a feature, not a bug; the elimination of MARC will be an act of creative destruction to ensure the future of cataloging.

This is necessary because “our needs have changed in ways that are difficult or impossible for MARC to fulfill” (McGrath, 2011, p. 2). A product of an earlier time, MARC was designed to automate the production of print catalog cards, “not for computerized searching or to supply machine-actionable data” (p. 3). Looking to the future, the conceptual world of FRBR leaves little room for MARC, a metadata format in which “it’s not easy to represent relationships and hierarchies” (p. 12). Kelley McGrath, a cataloger at the University of Oregon whom I interviewed in this study, included these

insights in a presentation entitled “Will RDA Kill MARC?” given at ALA Midwinter 2011. An attendee of that presentation reported on Autocat that an audience member at McGrath’s presentation asked whether it would be wiser to wonder whether MARC will kill RDA. Indeed, McGrath recognizes the possibility that the cataloging world remains too invested in MARC to take a chance with a new standard like RDA which would require a replacement (or at least a dramatic overhaul) of MARC:

RDA was financed by the major Anglo-American national libraries and library organizations. They want a return on their investment so RDA is locked down behind a pricey subscription pay wall. It’s out of reach of many of its potential users. MARC21 has always been a freely-available standard and it’s hard to imagine that the vision that we have of a brave new data format will work if that new data standard, too, is not out there for all interested parties to use. (p. 21)

In order to demonstrate the value of RDA in the face of such challenges, its proponents have explored potential future applications for the standard, especially applications which might help attract the use of RDA outside of the library field. 2007 saw the beginning of efforts to forge a common future for RDA and the Dublin Core metadata standard, known for its ability to serve as a crosswalk due to its relative simplicity. The stated goals of these efforts include “a metadata standard that is compatible with the Web architecture and that is fully interoperable with other semantic Web initiatives” and “wider uptake of RDA” (Hillmann, 2007, p. 11). Recent developments on this front include projects to incorporate RDA elements into Semantic Web applications (Dunsire, 2010).

## **Opposition to RDA**

Not everyone agrees that RDA is a prerequisite to a meaningful future of cataloging. The editor of AACR2 believes his standard remains “perfectly and demonstrably capable of accommodating all formats, including electronic documents” (Gorman, 2007, p. 65). In contrast to those, like Hillmann and Dunsire, who want to bring library cataloging into alignment with Web data standards, Gorman blasts what he sees as the “simplistic approach of those who think that free-text searching used by search engines can substitute for cataloging. Welcome to the wonderful world of 1,321,957 ‘hits’ in random order” (p. 64). He goes so far as to marvel that “the world’s libraries have taken metadata seriously” (p. 64) and declare that RDA will represent “a giant leap backwards for cataloging” (p. 65).

Others have reacted with trepidation to RDA’s expansion of the principle of cataloger’s judgment, suggesting “catalogers as a group haven’t seemed to develop any greater penchant for risk than they had back in the 20<sup>th</sup> century” (Intner, 2006, p. 10). Intner also asks “how... RDA’s authors expect anyone on the planet to understand” (p. 11) the overly conceptual terminology of FRBR.

In earlier 2010, Elaine Sanchez of Texas State University conducted an online survey of catalogers’ attitudes toward RDA. Part of her intention was to gauge the possibility of “retain[ing] AACR2 and its updating device, LCRI (Library of Congress Rule Interpretations), for those libraries that cannot afford to move to RDA, as well as having RDA... available for those who want to utilize this code” (2010, p. 21). She was partially inspired to do so by the observation that “the cost of RDA itself is prohibitive for many libraries” (p. 20), wondering if RDA were worth the effort.

Criticism of RDA also comes from the opposite direction. Such critics argue that RDA still makes assumptions “which emanate from traditional cataloging practices” (Hillmann, 2006, p. 9), thus keeping libraries isolated from other information communities, especially “Non-MARC Metadata (NMM) communities” (p. 9). For example, Diane Hillmann reports that when she voiced such criticisms on an RDA listserv, she received responses from “a few lurkers from the archives and museums community who said to me, in essence: ‘RDA doesn’t reflect the needs of our communities either, not any better than AACR2 did’” (p. 10).

One of the stronger examples of this strain of criticism argues that RDA “can only keep us rooted firmly in the 20<sup>th</sup>, if not the 19<sup>th</sup> century” (Coyle & Hillmann, 2007). In this highly influential article, “Resource Description and Access (RDA): Cataloging Rules for the 20<sup>th</sup> Century,” Karen Coyle and Hillmann stress the still firm foundation of RDA in AACR2 and, by association, the card catalogs of the past. They argue “that if libraries do not step up to the challenge of change they will become increasingly marginalized in the information age to come” (2007). It is worth a brief note that this criticism from Hillmann predates the DCMI-RDA meeting that, in effect, “converted” her on the RDA issue. It seems fair to say she retains the conviction that RDA comes short of the cataloging community’s needs, though she would now see it as at least a step forward.

Echoing the criticism of Coyle and Hillmann, Tennant points out RDA’s JSC “continues to seek the bulk of its reviewers from the traditional library cataloging world” (2007). These individuals, he argues, “are heavily invested in traditional ways of doing things and may not fully appreciate the opportunities offered by modern computer

systems” and “may also wish to prevent the need for substantial and potentially expensive changes to the existing record base” (2007).

Others have expressed concern that RDA fails to meet the challenges facing the cataloging community, especially in making the library catalog “the preferred gateway to information discovery among patrons” (Gardner, 2008, p. 81-82) compared to search engines.

### **FRBR in RDA**

As one of the more radical departures from AACR2, the use of FRBR principles in RDA has become a focal point of many debates on the standard. FRBR traces its origins to the 1987 dissertation of Barbara Tillett, now of the Library of Congress. Its title alone provides a glimpse of the role FRBR seeks to play—“Bibliographic relationships: Toward a conceptual structure of bibliographic information used in cataloging.” In the digital age, FRBR has found intellectual kin in the idea of linked data, central to the Semantic Web and database conceptions of information. Although this makes FRBR attractive to some as an example of the future of cataloging, it has also been observed that technology has already surpassed the conceptions of FRBR (see the interview with Erin Stalberg later in this paper).

“According to its authors, [FRBR’s overview of the bibliographic universe] as represented in library catalogs aids the user in finding, identifying, selecting, and obtaining various works, expressions, manifestations, and items,” explains Ehlert (2010c, p. 19). Its description of bibliographic materials in terms of these Group 1 entities supports search tasks such as desires for specific editions of a book, or certain

translations. As “RDA is not built on the familiar ISBD [International Standard Bibliographic Description] model but on the novel FRBR/FRAD structures” (p. 21), it presents a challenge for catalogers to adapt to, though Ehlert also argues that “catalogers have been organizing the sea of information into FRBR and FRAD models for a long time now; the differences lie in the terminology and... instructions for assembling the data” (p. 21).

RDA and FRBR have become so intimately intertwined that some scholars have felt compelled to remind the community that FRBR itself is “a conceptual model, not a set of cataloging rules” (Bianchini & Guerrini, 2009, p. 110). Though the incompatibility of FRBR and MARC has been met with calls for “FRBRized” catalogs (some efforts at which are being undertaken), Bianchini & Guerrini observe that “merely possessing a ball does not tell us how to play football nor volleyball... In this case, the expression ‘FRBR catalog’ is the logical equivalent of ‘to play with a ball’ and about as much use in practical application” (p. 110).

FRBR presents “a *generalized* view of the bibliographic universe; it is not intended to be independent of any particular cataloging code” (Copeland, 2010, p. 14-15). Thus documentation of RDA tends to be organized along the conceptual lines of FRBR. Recognizing the difficulties of parlaying these concepts into practice in the catalog, Klossner suggests “Unadventurous libraries can leave FRBR to one side for now” (2010, p. 8). He also worries that “RDA is suffused with FRBR terminology and is therefore very hard to comprehend for anyone not thoroughly familiar with FRBR” (p. 10).

FRBR seems to portend a shift away from the card catalog model in that it “abandons the idea of the record as surrogate for the physical item, and reorganizes books as classes of similar objects” (Ascher, 2008, p. 58).

### **Descriptions of RDA Controversy**

The creation of RDA has “been fraught with contention and challenges” (Ascher, 2008, p. 57). In part, this seems a natural byproduct of a dilemma faced by the JSC: “On one hand, they must change the cataloging code dramatically to support the new theoretical frameworks they are adopting, but on the other hand they must keep it the same so that current cataloging is still correct” (p. 59). This summary of the dual (some might say contradictory) mission of RDA could serve as a litmus test for separating RDA’s proponents from its detractors. Those that fail to see the value in the “theoretical frameworks [the JSC is] adopting” will almost certainly oppose the new standard; those that believe that “keep[ing] it the same so that current cataloging is still correct” will amount to only superficial changes may either accept RDA or reject it as an insufficient effort. Those that believe RDA has struck this balance, however, are likely to embrace the standard.

RDA has evoked such strong reactions because, in the debates over it, “at stake is the library profession’s place in the future of organization and access” (Kraus, 2007, p. 66). Kraus reports that “many camps agree... that libraries must get their data out of libraries if they want to remain relevant in the changing information universe” (p. 67), but at the same time, “competing with Amazon and Google seems wrongheaded to some” (p. 67) due to the differing goals of libraries and those profit-seeking ventures.



I hope that this paper, by compiling a variety of opinions on RDA from published sources, a survey, and five original interviews, will help those in the cataloging community better understand this battle for the soul and future of our profession. I also hope that those who have already made up their minds can realize that the extent of our disagreements only highlights the personal investment we all feel in the issues.

## **Methodology**

For the purposes of this study, I have focused on cataloging specifically in academic institutions. While AACR2 governs (and thus RDA may govern) cataloging in other library settings, such as school and public libraries, I determined the reactions to RDA in these other communities as well to be outside the scope of the study. Additionally, I have not attempted to track reactions to RDA outside of the United States. Since national libraries can issue modifications to international standards, implementation of RDA could still precede some degree of splintering among adopting nations. This decision, like the one to limit the study to the academic cataloging community, also had pragmatic motivations.

Besides the earlier review of published material, I have tracked relevant discussions on the Autocat cataloging listserv, analyzed a survey of cataloger's attitudes, and interviewed select professionals in cataloging in order to gauge professional reactions to the proposed standards of RDA. Regarding this group of individual catalogers interviewed, I sought professionals from academic institutions which were involved as partner institutions in the initial US test of RDA, as well as colleges and universities outside this category. I was also fortunate to speak with someone from the Library of Congress. Though not an academic library in the strictest sense, the leadership provided by that institution compelled me to seek professionals there as well. Similarly, I sought to interview someone from OCLC (formally, the Online Computer Library Center), but was unsuccessful in those efforts.

During the interviews, these library professionals were solicited for their opinions regarding the strengths and weaknesses of RDA, their perception of the sentiments of the

cataloging community at large regarding RDA, and how they think RDA should be implemented, if at all. Most of the interviews were conducted by telephone, although one was conducted via emailed questions, at the request of the interview subject. Another, that with Erin Stalberg of North Carolina State University, was conducted in person. While I went into these interviews with a set slate of questions, the course of conversation frequently brought up new topics, yielding broader insights.

In selecting the potential interview subjects, I favored those catalogers with professional exposure to RDA in a formal creation or testing environment, although I specifically wanted insights from those whose experience with RDA was more informal as well. Selection of catalogers within the broader categories previously outlined then proceeded based largely on availability. At the conclusion of each interview, I presented the subjects with the option of having any or all identifying details—mostly name, position, and affiliation—omitted for any reason they saw fit. Most of the subjects felt comfortable having this information associated with their comments; one did not. I have made anonymous the identity of this cataloger.

I consider these interviews the most important aspect of the study. To supplement the insights gleaned from these interviews, and to help construct a larger overall picture of the cataloging community's reactions to RDA, I also sought out published material in professional journals, magazines, and blogs. These have been reviewed in the previous section. Besides these published writings, I monitored the Autocat listserv—an electronic mailing list of cataloging professionals—for further discussion of RDA. I also browsed the listserv's archives for previous debates.

Additionally, I examined a survey conducted in March and April 2010 by Elaine Sanchez of Texas State University–San Marcos regarding many of these same issues. Her survey had a much broader scope, including responses from catalogers worldwide in a variety of types of institutions. However, 91% of respondents to this survey were from the United States, and the system hosting the survey, SurveyMonkey, allowed results filtering that enabled focus on academic libraries, so its findings were very helpful to my inquiry. I am grateful to her for allowing me to include its results here.

Finally, I consider it beyond the scope of this study to come to any value judgments regarding RDA. While my own opinions have evolved during the course of my research, I do not seek to represent them here. It has been my firm intention to present an unbiased portrait of how the academic cataloging community in the United States has greeted the proposed standards. I hope these efforts on my part might help some individuals involved in these discussions better understand the viewpoints of those that they disagree with, and perhaps to come to a greater understanding of RDA itself.

## **Findings**

Catalogers have greeted RDA with various amounts of praise and criticism. This much is apparent even from informal observation. Ambivalence toward the standards, however, exists within individuals as well as the community at large. A proposal as complex as RDA resists black-and-white judgments. While I do not suggest that there are no zealots for or against, my research strongly suggests that uncertainty characterizes many individual catalogers' perspectives.

### **Section A: Professional Interviews**

#### #1: Anonymous

I begin my exploration of findings from a series of interviews with five cataloging professionals with the individual most skeptical of RDA. This person wished to remain anonymous; for the sake of narrative fluency, I will refer to her with feminine pronouns. She agreed to allow me to identify her as the head of cataloging at a small public university in the United States. Although she did not wish to have her name or affiliation publicized, she remained very concerned with the potential impact of RDA on her staff and patrons.

This cataloger has followed professional discussion of RDA on a number of listservs, as well as formal presentations and official reactions from other cataloging departments which have been made available online. She has also used the official RDA Toolkit as well as RDA Sandbox, an RDA test product from VTLS, Inc. which includes “over 250,000 FRBRized linked records.”<sup>1</sup> Although she does not work at an RDA test

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<sup>1</sup> <http://www.vtls.com/pressrelease/RDA-Sandbox-Program-Extended!-80>

partner institution, her university's catalog includes some RDA records acquired among vendor sets.

Based on her experiences so far, this cataloger believes RDA does not accomplish "anything that modifications to AACR2 couldn't have done." Like some of those more supportive of RDA, she recognizes a degree of conflict between RDA and the existing MARC format. She has observed that the most visible change from AACR2 to RDA currently is the different rules in capitalization in MARC fields such as the 245 title field, leading her to quip that many RDA records she has seen initially appear like "brief and crappy vendor records." She worries about the loss of the general material designation (GMD) controlled vocabulary, used to indicate the format of a specific resource, in favor of the 3XX fields of RDA, noting that this will require at least a change in OPAC display of records.

Speaking of vendor records, she also doubts the ability of commercial vendors to work to RDA's high standards when their records, especially for online resources, already tend to fall short of catalogers' expectations. She asks, "If [vendors] can't provide quality records now, how in the world are they going to handle RDA?" Furthermore, she worries that the current budget climate of many libraries make many of these changes impractical, "when cataloging is being outsourced to cut costs, [and] when there is pressure to get material out as fast as possible."

In reaching the conclusion that current library systems limit the potential of RDA, she is not alone. However, while most such arguments anticipate the necessity of systems growing to fit RDA, this cataloger identified some areas of RDA which already seem backwards in current systems. Referring to RDA's preference against abbreviations,

which are plentiful in AACR2, she asks, “In this day of Twitter, do we really need to spell out everything?” Recognizing the argument that abbreviations can be obstacles to multilingual comprehension, she suggests “systems be programmed to spell out abbreviations for us” in some cases, such that, for example, “ill.” in a record’s 300 physical description field would display as “illustrations” in an OPAC’s public view.

Despite such criticism, this cataloger also perceives positive changes in RDA. She appreciates tracing of all authors and the subfield i in 7XX entry fields which explain relationships between FRBR Class 1 and 2 entities. She approves of FRBR as a conceptual model, though she doubts her institution would be able to afford a new integrated library system (ILS) which could make better use of it. She cited the Australian Music Centre’s FRBRized catalog and Indiana University’s Scherzo music catalog as two which might present a model for fuller implementation FRBR in catalog systems.

She suspects that the full implementation of RDA is “a done deal,” even as the US national libraries conclude their testing period. She points to the fact that RDA Toolkit has required paid subscriptions since September 2010 as evidence that the final decision has already been made clear. While she believes that RDA’s JSC “think[s]” they allowed for sufficient input from the academic cataloging community at large, she suspects the day-to-day work of most professional catalogers meant that the community “just didn’t realize what was going to hit us.”

This cataloger’s position toward RDA can best be characterized as weakly conceptually supportive and strongly technically skeptical. She argues that “how [RDA

is] written gets in the way of its usefulness,” and that “The parts of RDA we [at her institution] like can already do without going to the full RDA format.”

#2: Kelley McGrath  
Metadata Management Librarian  
University of Oregon

For my second interview, I spoke with Kelley McGrath of the University of Oregon, in Eugene, Oregon, who has recently made contributions to the RDA discussion on Autocat. McGrath is active in professional organizations such as Online Audiovisual Catalogers (OLAC), and has been involved in organizational explorations of the RDA standards. As Metadata Management Librarian, McGrath also provided a perspective on RDA from a non-testing institution. At over 23,000 students, her University of Oregon is significantly larger than the institution of the previous interview subject.

McGrath estimates that she has personally investigated and experimented with RDA more than the average cataloger. She has paid less attention to professional reactions to RDA, but has gotten a feel for some of it through listservs and professional organizations. Her recent presentation, “Will RDA Kill MARC?”, from ALA Midwinter 2011, prompted some discussion when posted to Autocat; I have discussed this presentation previously in the literature review.

Like many catalogers, McGrath feels conflicted about RDA. She sees potential in the standards, which she feels “didn’t go far enough in some ways.” She likes the increased integration of FRBR, which she sees as a useful way of modeling data to support better user access, but believes the RDA authors have been rigid about element mapping in Group 1 entities, and cites the Library of Congress Working Group on the



Future of Bibliographic Control's recent reports that FRBR needs further testing before fuller integration. She also mentions concerns from within OLAC regarding FRBR interpretation, which can often be murky.

McGrath argues that the cataloging community "has to move beyond MARC to be viable." She recognizes the difficulty of letting RDA work to potential in an environment still defined by the decades-old MARC format, and realizes the challenges posed by this situation. Though she acknowledges that transition to RDA and to a yet-unknown MARC successor will constitute a "significant minus in terms of staff training time" and other resources, she sees such growing pains as necessary for the future of the profession. For her, the community now stands at a crossroads where "we have to move forward; we have to do something."

In the meantime, McGrath admits the need for compromises to allow for implementation of RDA in existing systems. Calling RDA "on balance, probably a step forward" in terms of the larger shift from print to electronic resources in libraries, she sees benefits for e-resources cataloging in the shift from GMD terms to the content-media-carrier model currently represented in the MARC fields 336, 337, and 338, respectively, which allow for more flexible description of nontraditional formats and offer more promise for unanticipated future formats.

Within the University of Oregon, McGrath reports that staff have undergone internal training to familiarize themselves with RDA and created a few test records as a hands-on exercise. They have not, however, begun creating RDA records outside of this training setting. Reflecting what seems to be a consensus among non-RDA test institutions, she says her institution is "waiting to see what the national libraries do."

While some of RDA's more vocal advocates have called for institutions to take leadership roles by running ahead with RDA records, the present situation represents something of a standstill, where no one party wants to make such a leap of faith just to see the standards officially rejected.

McGrath doubts this will be the outcome of the current national libraries' test, however. She believes that "realistically, given the investment" so far in RDA development, and with broadly held sentiments that the status quo is unsustainable, implementation is likely in the near future. Like many in the community, she hopes for some modifications and clarifications to accompany any final decision. She believes this is especially true in music cataloging, which suffers from a lack of application directions for access points in RDA and guidelines on how to distinguish an expression, the Group 1 entity, in FRBR.

McGrath felt somewhat satisfied with the opportunities for input from the cataloging community to RDA's JSC. She compared the present situation favorably to the initial attempt to craft AACR3, which she characterized as secretive. With RDA and its accompanying expansion of mission, she believes there were plenty of opportunities for input, even if all feedback wasn't necessarily heeded. In light of some of the criticisms of the JSC on this point, she acknowledges "perhaps they should have publicized it better," and suggested that a lack of reception to some such feedback could have been mistaken for a lack of input solicitation in the first place.

There is likely a good amount of truth in McGrath's observation that many catalogers would probably rather not deal with the shift to RDA, regardless of its merits, due to the attached costs. But in terms of the central costs versus benefits problem of

RDA, she personally feels the future challenges facing the practice of cataloging justify these costs.

#3: Armin Siedlecki  
Catalog Librarian  
Emory University

My first interview with a cataloger from an RDA test partner institution occurred with Armin Siedlecki of Emory University in Atlanta, Georgia. Emory is the only private university from which I interviewed a cataloger; it is affiliated with the United Methodist church and has a student population between that of the University of Oregon and the first interview subject's institution.

Siedlecki served as the lead staff member at Emory during its institutional test of RDA, and thus has engaged in considerable study of the standards. He also considers himself moderately well apprised of the academic cataloging community's reactions to RDA, including some of the major discussions and arguments. During the test period at RDA, Siedlecki worked as part of a team of six professionals who were all generally supportive of RDA.

Siedlecki believes RDA meets the needs of Emory, as well as the academic cataloging community at large, better than AACR2 currently does. He likes its provisions of "building blocks" for information architecture more appropriate for non-print resources. For him, this represents a greater flexibility and conceptual adaptability present in RDA that makes the standards a more solid foundation for the future compared to the status quo of AACR2.

He also finds RDA appropriately grounded in FRBR, which he considers a good way of visualizing the organization of information. He does, however, feel additional examples and clear guidelines could help categorization of the Group 1 entities of work, expression, manifestation, and item, which frequently defers to cataloger's judgment in the absence of official policy. He identifies such clarification as one of the major areas for improvement he has observed in RDA, in addition to documentation for cataloging non-print resources. He would also prefer more guidelines for rare books and greater interaction with the Descriptive Cataloging of Rare Books (DCRB) standard. Siedlecki praises RDA Toolkit as a resource, expressing special praise for its navigability and crosswalks to AACR2 to facilitate transition between the standards.

Among the components of RDA testing at Emory, Siedlecki oversaw usage tests conducted with students and paraprofessionals comparing AACR2 records with RDA ones. While Emory personnel did not see the results of those tests, which were sent directly to the Library of Congress, Siedlecki cites a generally positive response from the subjects of those tests, in line with the perspectives of other Emory professionals, though he concedes that most catalog users probably could not notice a difference. Questions that frequently arose among professionals included indexing of additional 7XX entry fields and points of detail, such as capitalization of titles, Siedlecki reports. With the conclusion of the official testing period, Emory catalogers ceased creation of RDA records, though they have since continued to import RDA records from other institutions and have not converted any of these, nor those created in-house, back to AACR2; their creation of new RDA records is now contingent upon formal implementation of RDA.

Siedlecki finds himself surprised by the tone of some RDA debates within the cataloging community and suspects that that tone, rather than the underlying questions, might be causing the greater amount of disagreement. Though he believes much of the discussion has been well conducted, and that the JSC is taking community concerns seriously, he laments that some opposition to RDA borders on “conspiracy theories.” He mentions that some RDA opponents have suggested that RDA and FRBR are being forced on the cataloging community in part because of Barbara Tillett’s dissertation outlining the foundations of FRBR, and assures me that he does not “see Barbara Tillett as a conspirator.”

Having overseen a localized test of the new standards at Emory, Siedlecki seems largely pleased with RDA and professional discussion thereof. With only a few minor points which he feels merit clarification or modification, he believes the standard well poised to serve as a foundation for the future of cataloging, especially in terms of emerging formats.

#4: Erin Stalberg  
Head, Metadata and Cataloging  
North Carolina State University

My one in-person interview took place with Erin Stalberg of North Carolina State University (NC State). With over 30,000 students, NC State ranks as the largest university at which my interview subjects work. Its library is a member of the Association of Research Libraries (ARL); typically of such members, NC State’s library system serves a university with a focus on science- and engineering-oriented research, including both undergraduate and graduate students.

Prior to moving to NC State, Stalberg was head of cataloging at the University of Virginia libraries, another ARL member. Besides serving as the lead staff member for NC State's official institutional test of RDA, in a role analogous to that of Armin Siedlecki at Emory, Stalberg has been active in the development of RDA since around 2005, including membership on a subcommittee of the American Library Association's Metadata Interest Group charged with reviewing RDA for non-MARC metadata communities. She also teaches Organization of Materials II (or advanced cataloging) as an adjunct faculty member at the School of Information Science at the University of North Carolina at Chapel Hill, which presently includes RDA instruction. Her experience with RDA also includes reviewing drafts of the standards and developing staff training programs.

Given the current structure of cooperative cataloging, Stalberg does not think RDA fits the needs of academic cataloging any better or worse than AACR2. Regardless, she sees RDA as a very important potential step, and NC State, as a partner institution in RDA testing, has officially endorsed its implementation. Like many RDA advocates, she recognizes a need to adapt cataloging systems to move forward, and she is realistic about these costs. From her position in a technology-heavy ARL institution, she feels comfortable saying that MARC has outlived its usefulness and must be replaced, though she also admits MARC still serves the needs of many institutions well, and that factors such as vendors selling MARC records complicate transitions away from the format. She hopes that RDA testing that has already occurred will help lower some of these costs, at least in terms of identifying which changes need to be made. In terms of potential MARC successors, she names the eXtensible Catalog project at the University of Rochester as

the closest thing to a built system for RDA, and also cites the Open Library Environment Initiative as a group exploring new systems for linked data and RDA.

Regarding the specific positives of RDA, Stalberg points to the encouragement of cataloger's judgment and the use of 33X fields that will help to incorporate new formats, although she also recognizes that this can make catalogers feel uncomfortable, especially when their supervisors don't know the answers any better. Her support for RDA also comes from the conviction that a failure to move forward will mean "the end of cataloging." If an effort as extensive as RDA fails, she reasons, no one will attempt similar reforms again, and "bibliographic description will have no viable future."

Interestingly, given her certain support for RDA, Stalberg seems the least enthusiastic about FRBR, even as she considers the model "appropriately predominant" in RDA. She considers it a document of compromise, with issues of language and perception, but doesn't see a viable alternative anywhere. At the same time, she says FRBR is hard for staff and doesn't fit into the way they work, especially with support staff who don't necessarily think about philosophical principles of bibliographic organization in their spare time. She wonders if an overreliance on FRBR conflicts with serving user interests, and considers the model a bit outdated.

Currently, Stalberg and other NC State cataloging personnel are continuing to create RDA records, since they have already been trained in RDA and want to maintain momentum assuming the national libraries decide on adoption of RDA; a decision against RDA would prompt them to return to AACR2 records. She suspects that among test institutions, those who carried out testing in groups are more likely to have reverted to AACR2 pending a final decision, while those, like her NC State, that used full-staff

testing are more likely to continue with RDA. A staff survey she conducted suggested some “interesting side effects,” including a Hawthorne effect as well as motivation associated with NC State’s institutional leadership in pioneering use of RDA.

Stalberg is completely satisfied with the efforts of the JSC to solicit input in the creation of RDA, stating that “the JSC did everything they could.” Rather than the JSC ignoring or avoiding input, as others have suggested, she suggests that the cataloging “community did not take them up on their offers.” Asked to estimate percentages of the academic cataloging community that support or oppose RDA, she speculates a 50/50 divide. She also agrees that many individuals, given their conflicted feelings, could also be said to be split 50/50 for and against.

“There’s not going to be a better time or a better place” for these sorts of efforts, Stalberg argues. In terms of RDA’s costs versus benefits, “We have to do the work and bear the cost if necessary.” She most strikingly states her position with an analogy: imagine the first day Henriette Avram went into the Library of Congress and declared that all of the traditional catalog cards had to be typed up in computer format—people must have suggested that such a step would be incredibly costly and unnecessary for the future of the profession. Even in the twilight of MARC, Stalberg argues, RDA has the potential to similarly create a new era in cataloging.

#5: Beacher Wiggins  
Director for Acquisitions and Bibliographic Access  
Library of Congress

Last of the interview subjects only alphabetically, Beacher Wiggins has worked at the Library of Congress for almost 40 years, beginning as a cataloger and reaching his



current position as Director for Acquisitions and Bibliographic Access after a series of promotions. Given the enormous amount of leadership provided by the Library of Congress to the academic cataloging community, I was pleased to have his perspective alongside those of the professional catalogers above.

Since early 2009, Wiggins has led the RDA test coordinating committee in the United States, along with his counterparts at the National Agricultural Library and the National Library of Medicine. Their committee has analyzed RDA records created by test partner institutions; later in 2011, they are expected to release a report on RDA in the national libraries that is expected to heavily influence the adoption of RDA throughout the country; while individual academic libraries need not follow such a judgment, they are unlikely to buck national standards to do so.

Given his role in RDA testing, Wiggins strives to follow community debates about RDA, with an eye toward having “a finger on the pulse of... what the community is thinking.” He believes some of the discussions that have tended to flare catalogers’ tempers are “based on a lack of understanding what is going on,” such as from hearsay or misunderstandings about what RDA does and does not do. He also suggests that some individuals “fail to understand what the test environment means,” in that such discussion should be taken as a natural part of the process, and points out that the national cataloging collaborative Program for Cooperative Cataloging (PCC), of which the Library of Congress serves as secretariat, can help make “some community decisions” to provide for adaptability or forge compromise on RDA guidelines.

Wiggins agrees that “a lot of what RDA can offer cannot really be demonstrated in our current environment,” including the inherent constraints of MARC. While

recalling fondly his long working relationship with the late Henriette Avram, the creator of MARC, he supports exploration of potential successors. He also cites the eXtensible Catalog as such a system, and the MarcXML format as a possible bridge forward. He believes Avram would agree with this need.

Among the challenges associated with possible implementation of RDA, Wiggins considers interoperability foremost. Even absent a formal decision, he notes, the current environment already contains records in both AACR2 and RDA. He also recognizes that the FRBR model requires changes in systems to accommodate the sort of hierarchy and linking of data that characterize its organization. He thinks RDA is appropriately grounded in FRBR, even if some “FRBR purists” or skeptics would disagree.

Since Wiggins leads a review process that is ongoing as of this writing, he has reserved judgment on most of the particulars of RDA pending the conclusion of the national libraries’ test. If published material and listserv chatter are any indicator, his committee will have a difficult decision to make, and perhaps further challenges in convincing dissenting segments of the community that the right decision has been made. To that end, it seems unlikely a simple “yes” or “no” verdict will answer the RDA question; modifications might go a long way toward promoting reconciliation within what looks like a divided community.

## **Section B: Autocat Discussion**

Unsurprisingly, professional catalogers on the Autocat listserv have discussed RDA and related topics frequently since the publication of the standards. The listserv provides a convenient outlet for professionals around the world to discuss pressing issues,

collaborate, and receive assistance on problematic issues encountered during their everyday work. Perhaps due to the level of detachment inherent in electronic communication, Autocat discussions on RDA have frequently enabled dissemination of rather strong opinions; thus, I found it an interesting insight into perspectives of professionals strongly supportive of or opposed to RDA. I hope some of my observations from Autocat discussion threads supplement information gleaned from my interviews and Elaine Sanchez's survey.

Out of professional courtesy, I will not name any individuals from these Autocat discussions, nor will I directly quote from them. Instead, I will aim to provide overviews of some of the specific discussions that attracted opinions from a number of catalogers, including major arguments presented. I would be happy to direct those desiring more information on these discussions to relevant sections of the listserv's archives.

In late August 2010, an academic cataloger posted a review of RDA Toolkit to Autocat. He praised RDA and identified himself as an RDA supporter, but he voiced a criticism also expressed by Erin Stalberg in my interview with her: that the Toolkit is organized around abstract concepts rather than the typical workflow of a cataloger. He was especially critical of the disorganization of formats within Toolkit. His review prompted agreement from other users, who pronounced Toolkit difficult to use, overelaborate, and unhelpful for actually understanding RDA. Several of these professionals argued that AACR2 lacked these problems. Overall, the thread accrued over 40 replies in about two days.

Some of these debates on RDA arise from other topics, as Autocat members debate the potential usefulness of RDA to solve problems in cataloging and bibliographic

description generally. In one such discussion, an academic librarian made an argument for the importance of authority control with a humorous example of an Amazon.com recommendation based on an author with a common name. This led some other professionals to express hope that the linked data foundations of RDA might allow for catalogs with the interactivity of sites like the Internet Movie Database (IMDB)—the typical IMDB page for a movie has links to the pages of all of the actors appearing in that movie, whereas actor pages have links to the movies that actor has appeared in. Perhaps predictably, disagreement ensued over whether RDA could allow such authority control. Others pointed out that such an issue better describes the shortcomings of MARC, rather than AACR2.

One thread that began as a discussion of the demise, in RDA, of the rule of three, morphed into a debate on how exactly RDA changes serve user needs. One academic librarian argued that most users neither know nor care much about the intricacies of cataloging, implying that they are in no position to provide real insight into the efficacy of RDA changes. Others disagreed, and cited examples of sophisticated patrons curious and knowledgeable enough to care. Several users latched on to a colorful comparison of library searching with finding and eating pastries or ice cream. A library and information science (LIS) professor argued that while some consumers may be interested only in eating tasty foods, many others remain very interested in details such as the makeup and origin of their foods and food ingredients. Other discussions addressed the extent to which users want or need catalogs structured around FRBR concepts. For me, the disagreement present in this thread suggests a clear need for user studies that can accurately measure patron satisfaction and success with user tasks (defined in FRBR as

find, identify, select, and obtain). I suspect they would reveal that both sides are correct—some patrons crave information at specific levels of work, expression, manifestation, and item, while some just couldn't care less.

During the course of one of several discussions about the inadequacy of MARC, especially with RDA standards, a public library cataloger raised an interesting pair of questions: whether present shortcomings of OPACs stem from AACR2 and whether RDA can help move beyond those. RDA proponents pointed to its conceptual foundation in FRBR as evidence that RDA would create a path for OPACs to follow. Others raised the resource issues involved in implementation of RDA—the conflict between RDA's tendency to include more information in a record and the current environment's pressure toward creating records quicker rather than in greater detail.

One of the most incendiary debates occurred when a public librarian publicized the email addresses of the US RDA Coordinating Committee and encouraged catalogers to email them with complaints about the substance of RDA and the specifics of its testing. While strident in its own right, this call might not have led to such vigorous debate had its first respondent not deemed it an invitation to harassment. Autocat members disagreed strongly whether such proposed actions would qualify as harassment. Those that felt it would argued that official channels for feedback were the only appropriate venue for such efforts; others empathized with the frustration of the public librarian, who called the official channels inadequate in her initial email. Professionals receptive to her call argued that such action was justified because RDA leaders had ignored previous feedback.

A thread that caught my attention came in response to a talk by Diane Hillmann which I attended at the UNC Chapel Hill. In that talk, Hillmann praised RDA and encouraged institutions to show leadership by adopting it before an official decision was made. She also discussed the potential of Dublin Core to express some RDA elements better than MARC, and stressed the value of having a metadata standard, like Dublin Core, useable outside a library environment. As these ideas spilled over into Autocat after a prompt from another attendee of that talk, many catalogers greeted the idea with skepticism, arguing that Dublin Core is a dumbed-down version of MARC. An LIS professor disputed this position, but also suggested that RDA would not be helpful in creating a metadata standard more useful outside of libraries. Something like consensus developed around the idea that while MARC remained a useful, rich metadata format, more effort into crosswalks like MarcXML and Dublin Core would be fruitful.

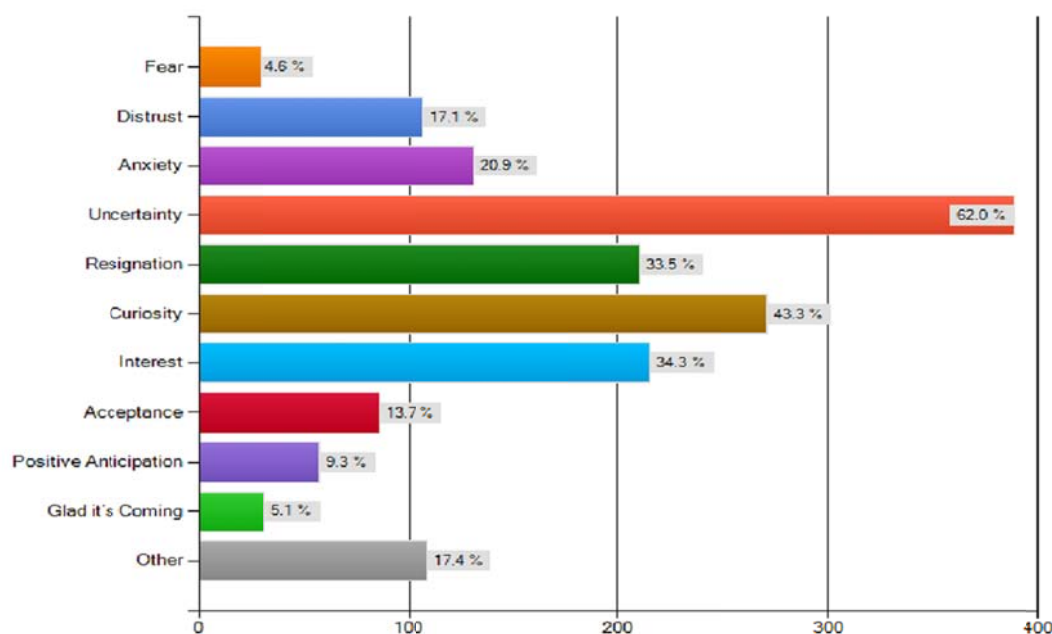
More recently, a public library cataloger posted Kelley McGrath's presentation, previously discussed in the literature review, to Autocat, leading several respondents to ponder the problematic relationship between RDA and MARC. One cataloger reported that at the original presentation, an audience member wondered whether it would be MARC that kills RDA. The thread seemed to attract RDA opponents. One academic librarian wondered whether stakeholders such as administrators and users could be mobilized against RDA based on its costs.

### **Section C: 2010 Survey by Elaine Sanchez**

The March and April 2010 survey by Elaine Sanchez of Texas State University has been mentioned earlier in the literature review; here, I will review the findings of that

survey in greater detail. In the interests of clarification, please note I had no involvement in the creation or administration of this survey, and I am grateful for permission to analyze its results here.

Very early on in this survey, an interesting question asked catalogers to choose the word or words that best characterized their feelings toward RDA:



**Figure 1: "Please select the word or words that most closely match your personal feelings toward. RDA"**  
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Of 626 respondents to this question, 388 chose “uncertainty”—perhaps the most neutral word of the list. Pointedly positive or negative words garnered much less support. Of the 109 who chose “other,” some chose words, such as “confusion,” “skepticism,” or “disinterest,” which might fairly be considered with other words that were listed as options. Some of the more colorful write-in answers included “loathing,” “dread,” “amusement,” and “inadequate (both me and RDA).” While I will not attempt a

quantification of these “other” answers, an overview of them suggests they tend toward negative responses—positives in this category were almost always qualified.

Of the less open-ended questions, where respondents were asked to agree or disagree with statements about RDA, AACR2, or a comparison thereof, I found it enlightening to look for evidence of consensus. On these questions, respondents also had the option to answer “No Opinion and/or Don’t Understand,” which proved to be a fairly popular response. For example, to the statement, “RDA’s Vocabularies and Element set have consistent and complete terminology to describe the relationships between FRBR and RDA elements, etc.,” yielded 318 such responses of 539 respondents, or 59%. Given the extent of disagreement within the cataloging community and the presence of this neutral response, it seems safe to conclude that, at least among these respondents, majorities point to something like consensus.

Lumping “Agree” and “Strongly Agree” responses, as well as “Disagree” with “Strongly Disagree” ones, begins to reveal some common ground. I identified eight of these statements where over half of respondents either agreed or disagreed:

	Percentage	Response	Statement
1	69.6	Agree	The underlying FRBR model supports linking between entities, such as works and persons, allowing the description of relationships between them
2	73.6	Agree	RDA’s elimination of tracing only 3 added authors increases user access, improves machine-processing, provides better representation of the resource
3	65.9	Agree	RDA will slow down cataloging production only for a limited time as catalogers learn the rules
4	53.8	Disagree	Increasing cataloging turnaround time (from receipt to patron) is NOT a service problem at my agency
5	54.8	Disagree	NO INCREASE in backlogs is expected due to RDA implementation (RDA learning curve WON’T increase backlog growth)
6	75.9	Disagree	I anticipate NO negative impact on cataloging productivity or turnaround time due to RDA
7	57	Agree	Changing to RDA from AACR2 is something all catalogers need to be ready to implement
8	75.5	Agree	AACR2 is still an excellent, easy to use, inexpensive set of rules with a viable updating LCRI mechanism, and remains a useful cataloging code

Figure 2: Statements with majorities agreeing or disagreeing



The statements I coded above as 3 through 6 point to a clear area of agreement: implementation of RDA will result in increased strain on cataloging personnel. Such majority opinions almost certainly include both supporters and opponents of RDA. Comparing the breakdowns for 4 and 5 with those of 3 and 6 suggests that much of this fear focuses on the short term. Among the others, 1 seems to be a factual statement. Only 50 of 543 respondents disagreed (11 of which disagreed strongly) with this description of FRBR; the remaining 21.2% of respondents chose the neutral response. Statement 2 yields a rarity—a change in RDA from AACR2 which enjoys broad, unqualified support. Responses from other questions from this survey also suggest that AACR2’s “rule of three” limited the number of listed authors per record should be eliminated. Finally, Statement 8 speaks to a continued support for AACR2, if not necessarily at the expense of RDA. I find it noteworthy that with the exception of statement 6, it represents the largest majority agreeing or disagreeing with any single statement in the survey. Fewer than 100 out of 482 respondents disagreeing with this praise of AACR2 certainly suggests a community that can tolerate (if not outright embrace) the status quo.

Following the same standard of majority opinions, it is worth viewing the responses to a pair of questions asking respondents to compare the effectiveness of AACR2 versus RDA for a variety of resource formats:

AACR2-favored formats	Print books, e-books, print serials, e-serials, media (CDs, DVDs, kits, etc.), software (CD-ROM, digital discs, etc.)
RDA-favored formats	Integrating e-serials and e-databases, streaming media, remote resources, websites

Figure 3: Effectiveness of AACR2 and RDA in the cataloging of different formats

A cursory glance at this breakdown suggests respondents favor RDA for emerging formats and AACR2 for more traditional ones. Some apparent exceptions have simple explanations. For example, e-serials were favored by a very thin (< 2%) margin, and the only format from this table with only plurality AACR2 support; they and e-books also lend themselves more readily to being cataloged like their print equivalents. It seems unclear from these responses whether respondents felt RDA specifically represented a step backward for traditional formats, or if they merely sought to affirm AACR2's sufficiency.

This survey also suggests some areas for compromise, visible in this table:

Statement	Would Accept/Consider Accepting	No Opinion/Don't Know	Won't Accept
Accept RDA O.T./N.T. changes. Globally fix the O.T./N.T. differences to be implemented by RDA in your online catalog	<b>57.9%</b>	39%	3.1%
Map the new MARC fields 336(content type) 337 (media type) 338 (carrier type) to a modified 245 \$h [GMD]	<b>53.3%</b>	38.3%	8.4%
Don't use or map the 336-338 fields and instead insert usual 245 \$h[GMD]	32.5%	<b>50.3%</b>	17.2%
Use the new MARC 336-338 fields as is, once online catalog displays allow this	<b>59.4%</b>	37.3%	3.3%
Adjust to spelled out Department as per RDA (instead of Dept. as per AACR2 LC practice)	<b>73.9%</b>	15.4%	10.8%
Use or add spelled out words, instead of AACR2 abbreviations	<b>76.4%</b>	14.2%	9.4%
Use RDA rule of main entry fortreaties under the first country to appear on source	<b>57.6%</b>	39.3%	3.1%
Follow the dissolution of the rule of 3 added entries and add as many as found	<b>81.4%</b>	11.8%	6.8%

Figure 4: RDA rules that differ from AACR2, and selected workarounds

This series of statements, describing methods for implementing RDA rules changes in a MARC environment, or even within AACR2 framework, indicates willingness on the part of many catalogers to embrace some of RDA's more prominent changes. The one

exception in this table shows a hesitation toward abandoning the GMD vocabulary in favor of 33X fields, which themselves enjoy moderate support in the statement below. While more esoteric changes, such as those applying to the Bible and international treaties, seem to evoke more hesitation, more general ones garner significant levels of support, such as the abolition of the rule of three, as addressed previously.

Another finding of this survey that seems to lean towards favoring AACR2 comes from a pair of questions gauging support for some form of maintenance of AACR2 even if RDA is implemented. The first asks respondents to agree, disagree (both of which can be “strongly”) or give another or no opinion given the statement, “A fully updated and maintained AACR2, with continuing LC and Joint Steering Committee for Development of RDA support, and LCRI [Library of Congress Rule Interpretations] service, should be maintained in addition to RDA for those libraries that choose not to utilize RDA cataloging rules.” Of 485 respondents, 55.1% agreed or strongly agreed with this proposition, compared to 16.4% disagreeing (including strong disagreements). Additionally, 13.4% of respondents chose the “Other” option, which tended toward disagreement or qualified agreement, often contingent on the cost of RDA Toolkit or the resources of the libraries still using AACR2. The other question in this vein asked, “If AACR2 were not maintained by its official agency, Joint Steering Committee on Development of RDA, would you support an AACR2 maintained by a cataloging community, with voluntary discussion and adoption of standards and changes?” Limited to yes, no, don’t know, or other, continued support for AACR2 in this context drops to 39.9%, suggesting a contingent of libraries which would continue to rely on AACR2 only as long as official support for it persisted.

If Sanchez's survey has a major shortcoming, it is that, at about one year of age, it may already be dated. Its administration, in March and April 2010, predates partner institution test period in the second half of 2010, many official and unofficial RDA training sessions, and the public release of RDA Toolkit. Many catalogers have likely gained much greater familiarity with RDA since the issuance of this survey. While it may be tempting to draw conclusions from this observation, we can really only speculate how, if at all, this greater exposure to RDA would affect responses to this survey if given again. Such experience could decrease continued attachment to AACR2 just as likely as it could cause those initially skeptical of RDA to double down. Regardless of how its specific findings hold up, the survey provides compelling insight into professional catalogers' reactions to change in their collaborative environment.

## Conclusion

Since the proposal of the Resource Description and Access standards, the academic cataloging community has seemed sharply divided over whether or not to implement those standards, or whether to accept them with amendments. Until the national libraries come to a decision, other libraries remain uncertain as to how exactly they will catalog materials in a few months' time. Perhaps some of this uncertainty has been increased by some of the very strong critiques of the standards, which once seemed certain to be adopted.

It has become quite clear during the course of this research that no one answer to the RDA question will please everyone in the academic cataloging community; indeed, *any* decision is likely to alienate large portions of it. Even if the standards were to be completely rejected in favor of the AACR2 status quo, those libraries already using RDA standards will have to re-adapt. For the more likely scenarios, in which the national libraries decide upon a full or partial implementation of RDA, the extent of adaptation necessary for the cataloging community only increases.

For all of the insights brought together in this study, many questions remain about RDA, FRBR, and the future of cataloging. Will administrators and other stakeholders approve the financial cost of transition? Will resources allow libraries to transition to post-MARC systems that realize RDA's full potential? Will official clarifications about FRBR streamline its greater acceptance or stifle its flexibility? Would implementation of RDA hasten the retirement of older catalogers who would rather not learn the new standards? Can RDA lead us to a world where non-library communities embrace library

standards? Is this practical—or even desirable? Will Google swallow libraries whole, and could RDA do anything about that?

I cannot provide the answers to these questions; in many cases, I believe no one can at this point. As plainly visible from the results of this study, many intelligent catalogers disagree, often strongly, about the answers.

In the face of this disagreement and uncertainty, I hope I have presented an unbiased compilation of some of the most common reactions in the cataloging community. I believe the interviews, considered alongside published material, might allow for the expression of nuance necessary to truly understand some of the battles being fought over the changes in RDA. Ultimately, I hope this study will contribute to professional understanding of how catalogers react to change in modern academic libraries, and how leaders can best develop and introduce proposed changes.

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## Appendix

### A: Recruitment Email Template

Dear [Mr./Ms./Mrs.] [Last name],

My name is Alex Kyrios, and I am a last-semester MLS student at the University of North Carolina at Chapel Hill. As a requirement for my graduation, I am conducting a research study for my master's paper, and I have chosen to write about professional reaction to the proposed standards of Resource Description and Access (RDA).

Given your position as [title] [at/for] [institution name], I have identified you as a cataloging professional I would like to interview for your thoughts on RDA. The interview could take place [in person/by telephone], and I more than happy to schedule it to best suit your needs. I may wish to conduct a follow-up interview, but I don't anticipate taking up more than an hour of your time total. I would like to incorporate your insights into my final paper, though I will also withhold your name and/or position if desired.

Please let me know if you would be interested in participating in this study, which I hope will make a valuable contribution to the cataloging community by identifying how we react to change, especially in terms of our evolving standards.

Best regards,

Alex Kyrios  
MSLS '11  
ackyri@email.unc.edu  
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**B: Interview Script**

Not all of these questions were posed exactly to each interview subject, and the course of discussion often raised additional questions. These ten, however, guided my inquiries:

1. How closely have you been following the academic cataloging community's reaction to RDA?
2. How much have you personally looked into RDA? Explain the sort of steps you've taken.
3. Do you feel RDA meets the needs of your institution better than, worse than, or about the same as AACR2? Please explain.
4. Do you feel RDA meets the needs of the academic cataloging community better than, worse than, or about the same as AACR2? Please explain.
5. In light of voiced opposition to RDA, do you still believe RDA is on track for full implementation?
6. Has your institution begun creating records in RDA? Why or why not?
7. If you had to provide rough estimates, what percentage of the academic cataloging community would you say is supportive of RDA? Against? Indifferent?
8. Do you believe the RDA Joint Steering Committee allowed for sufficient input from the academic cataloging community at large?
9. Given the overall shift from print to electronic resources, do you believe RDA represents a step forward or backward for the academic cataloging community?
10. What are your thoughts on FRBR? Do you believe RDA is grounded too firmly or too loosely in those principles?