LC RDA Project Summary and Update

RDA LC-PCC Policy Statements

The task of updating the documentation related to *RDA* fell to LC Policy, Training, & Cooperative Programs (PTCP) Division in 2019. Starting November 2019, PTCP formed a project team with experienced catalogers from other LC cataloging units to review the existing LC-PCC Policy Statements (PS) and map them to RDA in the then-beta RDA Toolkit. Meanwhile, the PCC Policy Committee (PoCo) established several Beta RDA Task Groups to focus on the four substantive cataloging questions based on the new RDA structure. PTCP assigned staff to co-chair those task groups to submit the report by May 2020.

PTCP completed reviewing and mapping existing LC-PCC PS in mid-2020 and started writing new LC-PCC PS based on the new structure of RDA in beta RDA Toolkit. After receiving the reports of Beta RDA Task Groups, the project team included PoCo's decisions in the PS writing.

Because ALA planned to publish RDA in DITA (Darwin Information Typing Architecture), LC had to create its own policy statement DITA files for any RDA content created through the normal update process for RDA. PTCP created an LC PS DITA editor team in mid-2020, with five members voluntarily learning DITA coding and the Content Management System (CMS) that ALA uses to publish RDA. PTCP worked closely with an LC ILS specialist and developed a batch-processing program to convert the policy statements to DITA by using XSLT, Python, and Microsoft Excel. Initial PS batch loading was successfully accomplished in late October 2020. This batch loading program enabled PTCP to publish over 6000 LC-PCC PS together with the official release of RDA Toolkit in December 2020.

Starting from January 2021, PTCP led the project team to focus on finishing the writing and reviewing of LC-PCC PS. By mid-March 2021, the project team successfully finished reviewing over 9000 PSs. The DITA team worked hard to batch load all LC-PCC PS to RDA Toolkit and successfully get them published together with the first official RDA Toolkit update in April 2021. PTCP released an error report form for users to submit all typos and grammatical issues. PTCP subsequently made edits to the LC-PCC PSs that were tied to any of the Conditions and Options in the RDA Toolkit that were changed in the July update.

As any LC-PCC PS update can only be publicly viewed by users after each RDA Toolkit's update, the LC team will need to follow ALA's RDA updating cycle to work on related PS updates.

Metadata Guidance Documentation

While working on LC-PCC PS update based on ALA's RDA Toolkit updating cycle, PTCP has launched another sub-project relating to the newest version of RDA. The new project, Metadata Guidance Documentation (MGD), gives descriptive cataloging guidance with examples and helps catalogers to work under new RDA instructions and terminology changes, in conjunction with the LC-PCC PSs. In early 2021, the writing plan was proposed based on the initial analysis of the original LC-PCC PSs in the RDA PS project, with the consideration of the guidance and examples that cannot be easily included in the new LC-PCC PSs. The writing plan suggested following the 2012-2013 joint LC and PCC working model to work with PCC and create bridge documentation, leveraging existing LC-PCC PS documentation to lessen the

necessity to create new, "pure" RDA documentation. The writing plan follows the 2012-2013 joint LC-PCC working model, where documentation was created to allow current cataloging practice to continue, without substantial change, under RDA. Once Original RDA became entrenched in the PCC community, changes began to be made; it is our expectation that a similar process will occur once official RDA implements. The Metadata Guidance Documents are functioning as "bridge" documentation from Original RDA to Official RDA; changes can begin to be made to the MGDs once the PCC community has become more familiar with the structure and the semantics of Official RDA and its supporting documentation.

After the proposal was approved, PTCP analyzed the existing mappings and identified MGDs that would need to be created. In the analysis of the existing LC-PCC PSs in the original RDA Toolkit, and the mappings from those LC-PCC PSs to the Official RDA Toolkit, PTCP realized that there would need to be two formats used for MGD creation.

- **1:1 MGD:** Many of the existing LC-PCC PSs map to one specific LC-PCC PS in the Official RDA Toolkit. These MGDs focus tightly on a specific element, with Guidance statements and examples in MARC and BIBFRAME (RDF).
- **Narrative MGD:** Other existing LC-PCC PSs map to multiple LC-PCC PSs in the Official RDA Toolkit. These LC-PCC PSs do not lend themselves to a specific mapping to the LC-PCC PSs in the Official RDA Toolkit, without implementing complex linking from many RDA entities that would introduce ongoing maintenance issues over time. Because of this one-to-many mapping, PTCP proposed a second format of MGDs. These MGDs, named "Narrative MGDs" are more general in nature and describe higher-level decisions that need to be made and applied in cataloging.

By the end of May, PTCP finished the writing guideline setup, created writing templates, and drafted writing samples. PTCP also finished MGD vs. LC-PCC PS mapping:

- 91 1:1 MGDs identified, mapping to over 300 specific LC-PCC PSs in the official RDA Toolkit
- 27 Narrative MGDs identified, mapping to over 1400 LC-PCC PSs in the official RDA Toolkit

In June, based on the workload, PTCP formed MGD writing groups to continue the collaborative work between LC and PCC to update the documentation that relates with the changes to RDA. LC MGD team members consisted of 14 staff from all ABA cataloging divisions and the Music Division. PCC MGD team members included staff from five USA universities and the British Library. LC MGD writing launched on June 9, 2021. PCC MGD work launched on June 28, and the initial session with the British Library MGD working group was held on July 8.

From June through the end of October, PTCP worked actively with all MGD writing groups based on their questions and needs, and writing progress. LC MGD group met every 3 weeks for project discussion and updates, in addition to separate sessions on individual issues. For the U.S.A. PCC team and BL working group, PTCP set up several virtual group discussions in addition to the email communications on specific topics. By the PoCo meeting in early November 2021, all MGD writers had finished their MGD writing assignments.

As the MGD writers are all top professionals in the cataloging area, they were allowed to use their creativity to construct the best content for the MGD based on their cataloging knowledge and experience with the topic. Therefore, at the end of the MGD writing, the 1:1 MGD numbers doubled in

number. Some narrative MGDs were added based on writers' suggestions, while others were abandoned as there were enough 1:1 MGDs to cover the topic and a few are on hold for further analysis.

These are numbers of all MGD files requiring review:

- 210 1:1 MGDs created, mapping to over 500 specific LC-PCC PSs in the official RDA Toolkit
- 24 Narrative MGDs created, mapping to over 1400 LC-PCC PSs in the official RDA Toolkit
- 54 compiled relationship label sheets created

Immediately after the completion of MGD writing, LC team started MGD post-processing work, including MGD review and file format update, to ensure the consistent presentation of the guidance, etc. LC expects to complete the MGD post processing work and publish all MGDs in PDF by the end of January 2022.

ALA's RDA Toolkit Update and RDA Testing

LC has uploaded and updated LC-PCC PS 3 times already to align with ALA's RDA Toolkit updates, including official release in December 2020, first update in April 2021, and second update in July 2021. As RDA is an integrating resource with constant updates, it brings challenges to the maintenance and publication of LC-PCC PSs. The LC team will need to pay attention to the structure and content change of RDA and make updates to LC-PCC PS DITA files accordingly.

ALA planned to have its third update of the year in October 2021. The RDA Toolkit website had a site migration scheduled in fall 2021, due to a change in vendor. However, the site migration did not take place as scheduled. As a result, ALA first delayed the update scheduled for October 2021 until December, and then canceled it completely. All updates accumulated for fall 2021 are now scheduled for March 2022. This change, of course, impacts the policy statement update schedule, as LC does not control the publication cycle of the PS updates.

In that update, other than the accumulated updates of the LC-PCC PS, the LC DITA team also plans to test links from some specific LC-PCC PS to the appropriate 1:1 MGDs so that users can easily access those MGD files while using RDA Toolkit. Eventually, every MGD that relates to a specific RDA element or instruction will be linked from the Toolkit, but this procedure must first be tested for functionality.

ALA's RDA Toolkit update schedule affects PCC and LC RDA project progress. PoCo released a brief [implementation plan in late Oct. 2020](#). Based on the plan, starting early 2022, there should be an RDA testing and analysis, followed by a related documentation update. PCC first considered RDA implementation after July 2022, when all the testing, analysis, and documentation update should have been completed. Now due to the delay of RDA Toolkit update schedule, RDA testing cannot start till March/April 2022, after RDA Toolkit update in March 2022, so that RDA content and related documentation will be stable during the testing. With the time that will be needed for the testing, resultant analysis and documentation update, PCC has to postpone the decision making time with regard to the RDA implementation. Therefore, at the recent PoCo meeting in November 2021, after receiving the latest RDA update information, PoCo discussed the situation and announced that PCC will not be implementing the new RDA Toolkit before October 2022. PCC has not decided on a date of implementation.