

LIBRARY OF CONGRESS
RDA Training Plan for 2012 - March 30, 2013
February 27, 2012 (Updated June 15, 2012)

(This training plan is a work in progress and subject to further revisions.)

Goal

The goal of this RDA training plan for the Library of Congress is to outline the means of providing staff members with sufficient knowledge and skills so they can function as RDA catalogers when they finish classroom training.

Decisions

1. “RDA LC Implementation Date” is defined as “the date when all catalog records newly created at LC will be produced according to RDA instructions.” The Library’s Acquisitions & Bibliographic Access Directorate (ABA) has set this date as **March 31, 2013**, by which date all LC catalogers must have completed RDA training. LC’s partner national libraries (National Agricultural Library and National Library of Medicine; and British Library, Library & Archives Canada, Deutsche Nationalbibliothek (DNB), and National Library of Australia) have been apprised of LC’s plans and — with the exception of DNB, which plans to implement in mid-2013 — also plan to target the first quarter of 2013 as their RDA implementation date.
2. Training for LC staff will occur in three Phases, described below. Note that these Phases **do not** include those already working as “RDA Catalogers” as of November 2011 (these served as RDA Testers in 2010 and received ‘Refresher Training’ in October 2011).
 - **Phase One:** Training will start **June 2012** for a core group of approximately 60 trainees, identified by chiefs. Some chiefs/supervisors may be included in this group. Each chief shall identify at least five persons (one per section if they so desire). At least one from each division should be able to serve as a classroom instructor. Phase One trainees will be reviewed by RDA Catalogers.
 - **Phase Two:** Supervisors and Chiefs will be trained in **July 2012**. They will receive the same training as their staff.
 - **Phase Three:** The remainder of the staff will begin training in September **2012**. Each month, three groups of 20 trainees will attend approximately 40 hours of classroom training, spread over four weeks. To help reduce the impact on trainees’ schedules and allow for the production of the sections to continue, trainees will be assigned to a primarily morning group (9:00-12:00) or afternoon group (1:00-4:00).
3. Trainees who arrive more than 15 minutes late or depart early will not be recorded as having completed the class. The person will need to take the course online, working with someone in their division until they acquire the knowledge and skills necessary to perform their job.
4. Trainees who miss classes will take the online courses being prepared for the overseas staff. Staff will need to look at the calendar of classroom courses they received for the month they were scheduled to attend and work out what they missed.

5. COIN will create a map before September 2012 of what to take online if you miss a scheduled classroom session so staff will have all the answers. When a person has to cancel, Evelyn Howard should be notified (ehow@loc.gov).
6. Upon completion of training, Phase One trainees will join with “RDA Catalogers” to form a pool of approximately 50-60 persons from which the Cooperative & Instructional Programs Division (COIN) and Policy & Standards Division (PSD) will draw instructors, classroom assistants, and peer-reviewers for Phase Two and Phase Three trainees.
7. After trainees complete classroom training, they will begin cataloging using only RDA.
8. Upon completion of classroom training, trainees will be reviewed by RDA catalogers (in their divisions, where possible). Initially, records will be subject to 100% review; catalogers may be released from review at the reviewer’s discretion.
9. “Train the Reviewer” and “Train the Trainer” instruction will be provided as necessary.
10. RDA training will be trainees’ highest priority and their primary focus for that period.
11. Chiefs and section heads will prioritize trainees. Those who will assist with instruction or serve as reviewers for their division should be the first to be trained, followed by those who primarily perform cataloging duties. Those who primarily perform acquisitions or non-cataloging duties may not receive training before the Implementation Date.
12. It is assumed that trainees will have little prior knowledge of RDA.
13. Trainees may need to adjust their work schedules. Although COIN will strive to avoid Mondays, Fridays, and Telework days, this may not always be possible.
14. Classroom training will not be scheduled in December 2012, although ‘supplemental’ classes may be held if necessary.
15. There will be a prescribed order of courses, and prerequisites will be used.
16. Groups of trainees, such as law or music catalogers, may elect to go through the curriculum as a unit in a given month.
17. Course durations stated in the curriculum portion of this document are estimates.
18. The target audience is current LC staff performing original and copy cataloging.
19. Those who perform only IBC cataloging will receive all RDA training except that related to the creation of authorities.
20. A special training plan will be developed for the Overseas Offices by June 2012.
21. A modified training plan will be developed for staff new to cataloging, once all current catalogers have completed training. This will be accomplished no earlier than Fall 2013.
22. The curriculum will focus primarily on print monographs, although other formats and types will be represented in instruction, examples, and exercises. A specialized curriculum will be developed to address other formats and categories and problematic situations. As needed, this specialized training will constitute part of the overall training.
23. COIN and PSD will work together to create a special session on copy cataloging that will be based on documentation written by PSD. All those doing Copy cataloging, whether original catalogers or technicians, will be invited to the Copy Cataloging training session(s).
24. COIN will schedule the interpretive services for the hearing-impaired staff once the month of training for these persons is determined.

Dependencies

1. A pool of specialists will be formed by March 2012 to assist COIN with the instruction and review of the cataloging of ‘special formats’ (e.g., cartographic, rare materials, sound recordings, moving images).
2. RDA macros will be distributed to all staff doing cataloging as well as supervisors before training commences. Updated macros will be distributed to staff two weeks before they are to start their training.
3. Cataloger’s Desktop logon/passwords will be confirmed and any necessary training in Cataloger’s Desktop will be provided ahead of RDA training.
4. Divisions will develop the allocations of ‘slots’ for their staff, in coordination with COIN. Adjustments will be made for special circumstances, such as hearing impaired, music and law catalogers all of whom wish to attend the training as a group.

Timeline

Participants will have at least five different courses to attend, some of them consisting of multiple modules. They will receive no less than 35 hours of instructor-led classroom training, delivered over the course of 4 weeks. This total includes mandatory practice sessions and the specialized training sessions but does not include the ‘reinforcement’ training described on p. 6 below. An estimated 420 persons will need comprehensive training. Assuming the phased training of 60 persons each month, it will take approximately from June 2012-March 2013 until all catalogers are trained. Original catalogers, where possible, will be scheduled first followed by technicians, some of whom do Copy Cataloging. Those who create IBC records only will be scheduled February and March of 2013.

Curriculum of Courses for Cataloging Groups

- Original catalogers, copy catalogers, and technicians will take the core curriculum of RDA courses. Special situations follow-up training will be offered. Where possible, copy catalogers and technicians will go through their classroom training together in February and March.
- Special Format catalogers will take the core curriculum of RDA courses (or the name authority modules only depending on whether they decide to adopt RDA for the descriptive elements for the format being described). Additional specialized format class will be offered.
- Acquisition specialists who create the Initial Bibliographic Control (IBC) record will take the core curriculum of RDA courses with the exception of those modules related to authority work. They will receive a set of IBC guidelines as part of their training.

Core Curriculum

RDA: Using the RDA Toolkit

RDA: Module 1 -- Introduction to RDA; Attributes of Manifestations and Items

RDA: Module 2 -- Attributes of Works and Expressions

RDA: Module 3 -- Relationships

RDA: Module 4 -- Authorities I: MARC Fields for NARs; NARs for Personal Names

RDA: Module 5 -- Authorities II: Family, Corporate, Geographic, Work/Expression

RDA: Guided Practice

RDA: Practice with Workplace Resources

RDA: Special Situations, Formats, or Audiences

RDA: FRBR Fundamental Concepts

RDA: FRBR Practicum -- Applying the Concepts

RDA: FRBR, RDA, and MARC

FRBR and Toolkit Q&A

FRBR

(nine hours)

FRBR: Fundamental Concepts (three hours)

- Concepts and terminology
- Understanding and application in relation to RDA
- Entities, attributes, and relationships
- Interactive quizzes (using Captivate tool); answers provided and posted

FRBR Practicum: Applying the Concepts (three hours)

- Depending upon size, each class may be divided into groups, for group discussion of examples followed by discussion by the full class
- Students are provided answer sheets of the entire exercise packet

FRBR, RDA, and MARC (three hours)

- Focus on how to implement RDA/FRBR using MARC fields

Using the RDA Toolkit (three hours)

- logging into the RDA Toolkit
- browsing the Tools tab and Resources tab of the Browse Tree
- following internal links to related RDA instructions and to LC Policy Statements
- following links from AACR2 rules to the related RDA instruction
- performing Quick Searches by RDA instruction Number and topical search terms
- performing Advanced Searches
- creating and managing Bookmarks and Saved Searches
- locating help and additional resources

Common principles of modules below:

- Based on August 2011 presentation by J. Kuhagen and B. Tillett to Georgia Public Library Cataloging Summit (see http://www.loc.gov/aba/rda/training_modules.html) [Supplemented by training materials prepared for “LC Testers in October 2011”]
- PowerPoint presentations; RDA Toolkit to review instructions and reinforce structure
- Extensive quizzes using PowerPoint and/or Captivate
- Exercises, following model of October 2011 “Refresher Training”
- LCPS, new MARC fields, in bibliographic and authority records covered as appropriate to content
- Emphasis on developing ‘cataloger judgment’

Module 1: Introduction to RDA; Attributes of Manifestations and Items

- Explain how RDA is an improvement over AACR in the future cataloging environment
- Cite some differences in terminology between AACR2 and RDA
- Describe the general structure of RDA, down to the “Chapter” level
- Recognize Core elements, alternatives, options, and exceptions
- Apply the provisions of Library of Congress Policy Statements
- Determine the appropriate sources for the resource in hand
- Apply the ‘principle of representation’ to transcribe, record, or supply bibliographic data
- Apply RDA Chapter 2 to record elements for title and statement of responsibility; edition; publication, distribution, and manufacture; and series
- Apply RDA Chapter 3 to record elements for media type; carrier type; extent; and dimensions
- Apply RDA Chapters 6 and 7 to record elements related to content
- Record other elements related to manifestations and items

Module 2: Attributes of Works and Expressions

- Describe the concept of “naming the work”
- Extract data from the appropriate sources
- Determine the preferred title for a work
- Determine the entities responsible for works (i.e., creators)
- Distinguish compilations from collaborations
- Supply additions to preferred titles in order to construct access points for works
- Describe the FRBR entity, “expression”
- Determine the basis for the authorized access point for an expression
- Supply additions to construct the access points for expressions
- Apply LC policies as stated in Library of Congress Policy Statements
- Construct variant access points for works and expressions according to LC policy
- Properly record work and expression data in MARC authority records
- Note some key changes from AACR2

Module 3: Relationships

- Understand how entities are related in RDA
- Distinguish types of relationships
- Determine the relationships that are core to LC catalogers
- Express relationships correctly in bibliographic records

Module 4: Authorities I: MARC Fields for NARs; NARs for Personal Names

- Describe the MARC fields for creating an authority record
- Utilize the relevant MARC fields to correctly record appropriate information from the resource
- Determine the preferred name for the person
- Formulate the authorized access point for the person
- Formulate appropriate variant access point(s) for the person
- Differentiate between a NAR based on AACR2 and one based on RDA

Module 5: Authorities II: Families, Corporate, Geographic, Work/Expression

- Determine the preferred name for a family, corporate body, geographic name, and work/expression
- Formulate the authorized access point for a family, corporate body, geographic name, and work/expression
- Formulate appropriate variant access point(s) for a family, corporate body, geographic name, and work/expression
- Differentiate between a NAR based on AACR2 and one based on RDA

RDA Guided Practice (three hours)

- This course provides the chance to develop expertise and ‘cataloger’s judgment.’
- A ‘common set’ of resources and exercises will be provided by instructors.

RDA Practice with Workplace Resources (six hours)

- This course provides the chance to develop expertise and ‘cataloger’s judgment.’
- Attendees will bring and discuss RDA records they have created in their daily work.
- Each practice session is three hours: catalogers will attend at least two sessions.
- Not to be taken until a few days after the other courses, so that attendees will have had the opportunity to have created RDA records.

Special Situations and Formats

(time variable)

- Short sessions, as needed, to address special categories of materials and situations
 - Compilations and collaborations
 - Translations and other expressions
 - Reproductions
 - Multipart items
 - Macros and templates

Specialized Curriculum

Special Audiences

(time variable)

- Content/media/carrier for non-print material
- Material processed by specific constituencies
 - Cartographic material
 - Electronic resources
 - Music
 - Microforms
 - CD-ROMs
 - PDFs
 - Serials
 - Legal Materials

Online Training for Audiences External to LC Capitol Hill

In addition to classroom training, online training will be offered to a variety of audiences (e.g., LC Overseas Offices, Shelf-Ready Vendors, and PCC members). These online training materials will be accessible free of charge to libraries around the globe.

- Sessions will be filmed and mounted on the web, etc.
- Classes will be conducted using a web conferencing tool for live sessions
- All training materials distributed in the classroom will be mounted on the web

Training Material Available

All LC-created RDA training materials will be mounted on the Catalogers Learning Workshop website at:

<http://www.loc.gov/catworkshop/RDA%20training%20materials/LC%20RDA%20Training/LC%20RDA%20course%20table.html>

Supplemental Documentation (“At a Glance,” etc.)

Suggested topics:

- *Structural Overview of RDA*
- *Terminology: AACR2 vs. RDA*
- *What’s Different from AACR2?*
- *New MARC Fields*
- *Supporting R-Documents*
- *RDA Training: URLs to Know About*
- *RDA Bibliographic Record Practice Workform*
- *others as determined*

Sample Training Schedule

Notes:

- The sample schedule below shows a generic pattern for one group, in one classroom.
- Each month, three such schedules for 20 trainees each can be offered.
- An overly-accelerated schedule would be unproductive and create reviewing bottlenecks.
- The schedule allows for ‘recharge breaks’ for trainees and instructors, and permits instructional staff to perform other duties (e.g., follow-up, consultation, review, non-RDA tasks). Mondays, Fridays, and holidays are avoided, and no trainee is required to attend training all day or every day (with the exception of an occasional “Specialized Curriculum” course). The open times can be used for ‘Office Hours,’ make-up classes, and performance support.
- With actual and expected decreases in staffing, acquisitions considerations argue against a training schedule that completely monopolizes the time of trainees.
- ‘Practice with Workplace Resources” sessions are delayed, to allow trainees to create RDA records for discussion.
- Each month, there will be two morning groups and one afternoon group, allowing trainees the other half-days to review, catalog, and perform non-RDA duties.

Monday	Tuesday	Wednesday	Thursday	Friday
	FRBR Fundamental Concepts (three hours)	Toolkit (three hours)	FRBR Practicum (three hours)	
	RDA Instructions: Module 1 (three hours)	RDA Instructions: Module 2 (three hours)	RDA Instructions: Module 3 (three hours)	
	RDA Instructions: Module 4 (three hours)	RDA Instructions: Module 5 (three hours)	FRBR, RDA, and MARC (three hours)	
	Guided Practice (three hours)	Practice w/ Workplace Resources. (three hours) Special Situations/Formats/ Audiences (three hours)	Practice w/ Workplace Resources (three hours) Special Situations/Formats/ Audiences (three hours)	