Implementing Official RDA
The experience of the National Library of New Zealand

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This article provides an overview of the steps taken by the National Library of New Zealand (NLNZ) to implement the Official Resource Description and Access (Official RDA) descriptive standard. Implementation occurred in August 2024 following a five- year programme of preparation, development and training. User testing was combined with implementation. Although this resulted in some months of confusion as earlier decisions were modified or reversed, we realised that it is only when working with real resources that we fully understood how the Official RDA Toolkit works in practice.
Resource Description and Access, RDA Toolkit, National Library of New Zealand, implementation of RDA, New Zealand

1. Introduction

In August 2024, the National Library of New Zealand (NLNZ) ceased descriptive work using the original Resource Description and Access standard (Original RDA)[1]. All new resources added to New Zealand's national bibliography are now described using the Official Resource Description and Access standard (Official RDA)[2]. We implemented the new standard after five years of preparation. To prepare, we developed Policy Statements, guidance documentation, metadata application profiles (MAPs), and a training programme. A year later, we consider our implementation to be successful, principally because we invested substantial time in the early stages of the project, investigated all options carefully, and trained for deep understanding of the standard.

2. The process

We are fortunate that we have both a large cataloguing team (by New Zealand standards), and within that team, a group of nine senior and very experienced cataloguers. This meant that we had the resources in-house to spend almost five years on a long, slow journey, taking our time to explore and map many unknown paths. We made the decision at the beginning that we wanted to finish the journey in the best place possible, so that we would be ready to switch to creating and sharing our library's data as linked data. We also took this opportunity to think deeply about how we create descriptions using RDA, and at the same time, how we encode those as MARC 21 records.

We did not have tidy Policy Statements in the Original RDA Toolkit, so we first needed to audit and then consolidate our policy from three separate policy documents, around ten format-based guides, further supporting documents in the Toolkit, and additional documentation in our shared drives and on our intranet. We spent almost four years prior to our training phase building a deep understanding of RDA, interrogating our own assumptions about why we do things the way we do, and experimenting with what it would look like if we made different choices or even let go of some things that we have been carrying since the AACR2[3] days.

We worked from a very detailed spreadsheet of our own, based on one shared by the British Library. This spreadsheet contains every one of the elements available for use, with a line for each point in the RDA Toolkit where there is an option, or where a decision is needed.

This spreadsheet has helped map the paths between the Original and Official Toolkits, and has helped us draft policy and keep oversight of the whole project. The Official RDA Toolkit can be tricky to find your way through when the paths are unfamiliar, so we have focussed on developing good signposts to clearly point out which paths to take.

It was a deliberate decision that all our signposts will be written into the Toolkit itself, so that if a cataloguer needs to consider RDA while cataloguing, then they can use the Toolkit to guide decision-making. Everything they need, in order to know which path to take, should be right there. This ensures that cataloguers have lots of practice walking the paths, building confidence, and – over time – speed.

3. Policy Statements

Our first group of signposts consists of our Policy Statements, which tell us when to record an element, and which of the options on the element page we should apply. Sometimes our Policy Statements tell us to apply only when additional conditions are met, or only for specific types of resources.

We aimed to have a Policy Statement at every option, and wherever else we think our cataloguers need to know what to do. This is a total of approximately 8500 possible Policy Statements, of which we have made 98%.

The Policy Statements are maintained in the same Content Management System (CMS) as the RDA Toolkit files. After we had drafted Policy Statements for a few thousand options related to elements that had been designated as Core elements in the Original RDA, we began a bulk-loading process to populate the NLNZ files in the CMS. We did four bulk uploads of between two and three thousand Policy Statements each time, with our final load timed for the July 2023 Toolkit release.

We don't intend to do any more bulk loads of Policy Statements – unless there is some change to RDA that requires changing thousands of files – and our workflow has settled into a manual process that is organised around the regular Toolkit releases. Our Policy group continues to meet, review and develop Policy Statements as needed, update our master spreadsheet and then make any changes needed in the CMS before the deadline for the next release.

4. Metadata Application Profiles

Our second group of signposts is our Metadata Application Profiles (MAPs). These bring together all the elements that our cataloguers might need to describe a resource, e.g. everything for a music sound recording, or everything for a

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print book – just like our current format-based guides in the Original RDA Toolkit. These are central to our workflows, and we trained our cataloguers to always start by selecting the appropriate MAP for the type of resource they are describing, then work from that MAP, clicking through to the elements as they need them. At each element the cataloguer determines the value to record using the element page options, then returns to the MAP. This workflow was laborious to learn at first, but now the MAPs function more as checklists or reminders as cataloguers have become familiar with the pathways.

We intend to create an overarching application profile listing all the entities, elements, and vocabulary encoding schemes we use when creating our metadata but we will do that after all the signposts that are needed for everyday cataloguing are completed.

5. Supporting documentation

Our third group of signposts is our supporting documentation, which gives detailed instructions and examples specific to our context, for recording values for particular elements. It also provides guidance for specific types of resources such as aggregates and amalgamations, information on our String Encoding Schemes and Vocabulary Encoding Schemes, as well as our decisions about how we encode each element in MARC 21. In keeping with our principle of keeping all the signposts in the Toolkit itself, the links to our documents are embedded in the relevant Policy Statements, so that it is as easy as possible to navigate to the instructions that are needed.

All our MAPs and supporting documentation are open and available on the RDA Toolkit at the NLNZ approach to resource description[4] page.

6. Preparing for implementation

After we had loaded most of our Policy Statements in July 2023, we felt confident that we had enough signposts in place to begin leading our cataloguers along the pathways. We decided to align our date for implementation with the July 2024 release of the Toolkit, which gave us a year to focus on training, while also continuing to complete the remaining policy and guidance.

7. Training programme

We developed our training programme with two separate groups in mind. The first group was NLNZ cataloguers. This group had to learn the Official RDA, while continuing to use the Original RDA in their daily work. We decided to train slowly so there was time to absorb new concepts and minimise the impact on workloads. NLNZ expects our cataloguers to understand why they are doing what they are doing but we don't expect them to understand everything about RDA. It was important for the training to maintain this balance.

The second group was New Zealand cataloguers. As New Zealand's national library, NLNZ has a responsibility to support libraries in our jurisdiction transition to the new standard. It is rare in New Zealand libraries for descriptive work to be carried out by librarians with a sole focus on cataloguing. It is much more common for descriptive work to be done in between other tasks, not just in the technical services space but also direct customer service rostered shifts. This group needs training resources that can be squeezed into their busy days.

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As a result of considering both groups, our training programme evolved as a "bite-sized" micro-training. Concepts were introduced gently, with later training building on the earlier, so that gradually a deeper understanding is developed.

8. Outline of NLNZ training

8.1 RDA Phase 1 training

Beginning in October 2023, this phase was a refresher for NLNZ cataloguers. The focus was on reminding them of concepts they already knew from the Original RDA and gently introducing some new concepts. Each week, learners were emailed resources to read on their own, along with some questions to ask themselves. Some resources were sourced from publicly available materials online, but we also created our own presentations and Niche Academy[5] tutorials when needed. On Mondays everyone came together online for a discussion, starting with the supplied questions but also discussing other questions and observations from the learners. We discovered that people liked quizzes so we would repeat the Niche Academy quizzes in the online meeting and found that this helped spark discussion.

8.2 RDA Phase 2 training

To begin this phase, NLNZ cataloguers gathered for three days of intensive training in February 2024. There were presentations, discussion, quizzes, interactive activities. The purpose was to have Official RDA concepts fresh in cataloguers' minds before the Practical Cataloguing Phase began the following week.

On the first day we covered resource entities, metadata statements and metadata description sets, coherent, minimum and effective descriptions, entity boundaries, and appellations and recording methods. Unlike the Phase 1 training, which focussed purely on concepts, this training started to put the Official RDA into the NLNZ environment.

On the second day we covered the four recording methods, looked at Mode of issuance and Extension plan, Diachronic works in the NLNZ context, and how to identify aggregate manifestations.

Day three started with a game, "RDA Bingo", followed by Data provenance, another look at Nomen and a brief introduction to the first NLNZ Metadata Application Profile.

8.3 Practical cataloguing

Practical cataloguing training began immediately following the intensive week with an emphasis on teaching pathways rather than covering every possible element. By the end of training, the goal was that learners should be able to approach any element with confidence, even if it had not been explicitly taught. Training was organised in three modules. The first module focussed on commonly used Manifestation attribute elements and introduced some work and Expression attribute elements. The second module introduced the basic pathway for Authorised Access Points. The focus was on the Person and Work entities and the module finished with recording a value of *Manifestation: expression manifested*. The third module introduced collection and augmentation aggregates. Encoding in MARC 21 was introduced in the last few days before implementation.

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8.4 Implementation and User testing

NLNZ implemented the Official RDA in August 2024. All descriptive work using the Original RDA ceased and the Official RDA became the preferred standard. We deliberately chose to implement before all the signposts were completed and the first nine months after implementation were treated as an active testing phase. Cataloguers were encouraged to identify Policy Statements and guidance that was unclear or needed refinement. We implemented this way to:

- encourage active engagement with the standard;
- reinforce the idea of a collaborative implementation with every person's contribution having value;
- take advantage of a larger number of real-life examples when testing.

This approach did result in considerable revisions to Policy Statements and practice in the first six months as we reviewed the decisions we had made prior to implementation. There was some confusion as we reversed decisions that had worked in theory, but it was only once we were using the standard with real resources that we fully understood how the Official RDA Toolkit works in practice. Engaging all staff with policy development in this way embedded understanding, a benefit which outweighed the difficulty of the first few months.

Initially, only static text resources were described, which led to cataloguing backlogs building in other formats such as sound recordings and serials, and it has taken a year for description of all formats to resume and return to normal productivity. We were prepared however to make this short-term sacrifice to give everyone enough time to build a strong foundation for success in the long-term.

9. Conclusion

At the National Library of New Zealand, we were fortunate that we had the resources and the support to take the slow approach to implementing Official RDA and this has been a major factor in our successful implementation. Our policy group was able to spend enough time to develop a deep and broad knowledge of the standard, which then enabled us to develop the Policy Statements, Guidance and training resources that supported all our cataloguers to become confident when describing the wide variety of resources we acquire for our published collections.

In turn, the experience we have developed and the resources we have created and shared should help other libraries to plan for their own implementation of the Official RDA Toolkit, using the pathways we have explored, and the signposts we have added, to more efficiently undertake their own journey.

Notes

[1] Available at: https://original.rdatoolkit.org/ (Accessed: 2025. 10. 17.)

[2] Available at: https://access.rdatoolkit.org/ (Accessed: 2025. 10. 17.)

[3] Available at: https://www.aacr2.org/ (Accessed: 2025. 10. 17.)

[4] Available at: https://access.rdatoolkit.org/Document/Document?documentId=efa32f78-2ecd-4f18-ba7e-6db9fa223ed9 (Accessed: 2025. 10. 31.)

[5] Available at: https://my.nicheacademy.com/natlib.gov.nz?category=27693 (Accessed: 2025. 10. 31.)