A REPORT ON THE STATUS OF RESOURCE DESCRIPTION AND ACCESS (RDA) IMPLEMENTATION IN PHILIPPINE ACADEMIC LIBRARIES

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Abstract

Since the arrival of Resource Description and Access (RDA) in the Philippines in 2011, various library organizations in the country have spearheaded training programs and workshops aimed at helping librarians understand the new code with the end goal of eventually adopting RDA. This paper is part of a longer study on RDA in the Philippines conducted by Santos (2015). It presents the current state of RDA in Philippine academic libraries in terms of their level of implementation to incorporate RDA in their cataloging practice. Questionnaires were distributed to academic librarians during a two-month period. Respondents were asked to identify the extent of implementation their respective libraries have undergone. This research used Hart's (2010) list of steps libraries can do in order to transition from AACR to RDA. A total of 85 academic librarians representing different institutions from all over the Philippines responded to the study. Responses revealed that librarians coming from institutions within or near Metro Manila have undergone more advanced steps in the implementation of RDA while respondents from farther areas such as in the Visayas and Mindanao, indicated a slower transition to RDA. After the extent of implementation of RDA in Philippine academic libraries was examined, it was revealed that a majority of the librarians are still in the stage of learning and being trained on the new code. A small number of participants, particularly the ones coming from larger libraries within Metro Manila, however, have indicated that they have move past undergoing trainings and have created their own cataloging policies adopting RDA.

Keywords: resource description and access, academic libraries, implementation, descriptive cataloging

Introduction

Resource Description and Access (RDA) is a new cataloging standard based on the framework of Functional Requirements for Bibliographic Records (FRBR) and Functional Requirements for Authority Data (FRAD), both of which are entity-relationship models.

RDA, being a new international cataloging standard, has been subject to scrutiny by librarians and scholars from around the world. It has been compared with its predecessor, Anglo-American Cataloging Rules (AACR). Intended to be embraced by all countries, it has already been implemented in Australia, Canada, Germany, Singapore, United Kingdom; and the United States.

Tillett (2011) explains the benefits of RDA being more user-centric and flexible when it comes to assigning relationships. She emphasizes that the rule of three becomes optional in RDA, and less abbreviations are used compared with AACR.

In addition to this, Needleman (2008) and Oliver (2007) both discuss the ease of use of RDA, its flexibility, and user focus. Oliver (2007) pointed out also that in order for teachers to be able to teach RDA more effectively, one must fully master the theoretical foundations of it first.

While Tillett (2011), Needleman (2008), and Oliver (2007) discuss some perceived advantages of RDA, the new code is not met without any criticism. Gorman (2007) describes several pitfalls of RDA such as it no longer subscribes to the rule of three, meaning retrieving resources might result to a lower recall. Another is that some RDA rules are redundant, while some areas lack appropriate general rules. He also stresses the issue of how RDA abandons universally accepted cataloging practices, such as the use of ISBD.

The general impression towards RDA includes the difference of its structure as compared to AACR. This difference was brought about by the changes in the whole process of transcribing bibliographic entries and vocabulary use, or the terms used to identify what is commonly known in AACR as elements. These are some of the many changes in RDA which were addressed by trainings and workshops all over the world.

In the Philippines alone, various library associations have hosted trainings for the new cataloging standard. They talk about what RDA really is and how drastic the difference it would entail when a library decides to replace AACR with RDA. These trainings provided the different RDA teaching modules and developed an entry-level familiarity with the new code. In 2013, the Philippine Association of Academic and Research Librarians (PAARL) hosted a workshop on RDA with Dr.

Barbara Tillett of the Library of Congress to train a small number of Filipino librarians, who eventually went on to become RDA trainers themselves. These RDA trainers were the resource speakers in various RDA seminars in the Philippines in succeeding years. The National Commission on Library and Information Service, in partnership with regional library organizations have hosted RDA trainings all over the Philippines. For LIS educators, the University of the Philippines School of Library and Information Studies has also hosted seminars and teacher-training workshops focusing on RDA. In 2014, PAARL also released a publication entitled: *Cataloging Policy Statement and RDA Guidelines for Philippine Libraries*. The publication serves as a guide for catalogers in their attempt to implement RDA in their libraries.

All the previous RDA seminars and workshops in the country aimed to make librarians more receptive to the change RDA brings. However, the effectiveness and impact of these trainings have not been studied yet, and it is unknown whether librarians have actually started adopting and implementing RDA in their libraries. This study sought to examine the extent of implementation of RDA in Philippine libraries.

Review of Related Literature

Miller (2011) explained why libraries are interested in implementing RDA by citing several situations in the history of its development which may influence a library's decision to implement the said new standard. He mentioned that there has been much discussion on the implementation of RDA. Adding to this, catalogers assume that because the Library of Congress (LOC) has invested so much in the development of RDA, it must be adopted by the national library. In the event the LOC adopts the new code, other libraries will likely follow suit. In 2014, the LOC has adopted it. Miller (2011) also mentioned that school libraries, special libraries, and small public libraries may find themselves not affected when it comes to RDA, primarily because of the costs involved in the implementation, the trainings needed once these libraries decide to apply the new code.

Adamich (2008) stated that the impact of RDA on school libraries will not be as visible as RDA's impact on other types of libraries. This is because teacher librarians working in school libraries usually modify existing cataloging standards they see more suitable for their collection. However, once school libraries decide to implement RDA, they may find it easier to catalog other multimedia materials such as streaming videos and other online document formats. These "new formats" go beyond traditional resources libraries have. Locally speaking, Philippine school libraries might also show similar phenomenon. Not all schools have libraries, and not every school which has a library has a librarian (Cruz, 2008). Be that as it may, organization of the collection, is not really a cause of concern for public school libraries in the Philippines. Only private institutions undergoing accreditation are likely to look deeper into this and eventually adopt the new code.

Professional library organizations such as PAARL and the Philippine Librarians Association, Inc. (PLAI) have hosted RDA seminars for librarians and LIS students. Obille (2012) examined the

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shift from AACR to RDA and described the measures Philippine libraries have engaged in to adopt RDA. She provided a list of RDA workshops for the years 2012 to 2013. She added that library schools, such as the University of the Philippines School of Library and Information Studies (UP SLIS), started offering courses on RDA. In the previous semesters, UP SLIS implemented a curricular change to accommodate RDA by adding it to existing cataloging courses. She also indicated that some universities such as Baliuag University and St. Mary's University in Nueva Vizcaya already started revising their library systems in order to accommodate RDA. She concluded that there is no paradigm shift but librarians need to shift their attitudes in order for RDA to be properly implemented.

A study by Acedera (2014) about RDA in Mindanao examined the readiness of Mindanao libraries to implement RDA. She found out that majority of respondents were still not sure on how to implement RDA despite being trained. Some of the respondents mentioned that they were not comfortable with RDA and were not confident that the training they received is enough. It was also suggested that a training manual similar to *Maxwell's Handbook for AACR2* be developed.

Hart (2010) enumerated the following steps libraries need to perform in order to prepare for RDA. These are some possible implementation steps:

1. Decide when to commence implementing RDA. This includes acquiring RDA resources
2. Address budget issues raised by this shift. The decision to implement any kind of change entails planning and preparation, and this comes at a price.
3. Identify and define the training needs of the library. This includes determining when to train the staff, and the extent of training needed which is dependent on the kind of cataloguing performed in the library.
4. Plan for retrospective data changes in case the need arises. RDA is backward compatible to AACR, yet Hart (2010) emphasizes the readiness of the system to receive RDA changes before loading them.
5. Examine system changes to optimize RDA enhancements.

Methodology

Santos (2015) studied RDA in Philippine academic libraries particularly focusing on four aspects: awareness, acceptance, perception, and implementation. She discussed how aware librarians were of RDA, as well as their acceptance of it, and their general perception of the new code. This paper is a report and expansion of the implementation part of the previous study.

Initially, the researcher planned to interview and contact catalogers. However, there are only a few librarians who hold the job title "cataloger" as most librarians have multiple tasks in the library. It was also deemed important to include not only the users and implementers but also the decision makers. As such, the respondents of this study were academic librarians both in the staff level and supervisory levels in the Philippines.

To get responses from a large number of target respondents, the researcher consulted directories and resources from PLAI and PAARL. Aside from this, the researcher uploaded an online version of the questionnaire in order to reach more librarians who can participate in the study. The researcher also consulted PAARL's list of academic libraries to identify the appropriate academic institutions to be contacted.

The questionnaires were e-mailed to the target respondents. In the end, a total of 85 academic librarians responded. Contents of the questionnaire sent to the respondents were based on Hart (2010). These statements were combined with a Likert scale with the assigned values:

1 – No implementation. This means the library has taken no steps towards RDA implementation.
2 – Current implementation. This means the library is currently engaged in processes towards RDA implementation.
3 – Full implementation. This means the library has completed the step towards RDA implementation.

The scale was fully explained in the questionnaire in order for the respondents to provide the most appropriate response. A comments section where the respondents can further elaborate their responses was also included in the questionnaire.

Results and Discussion

Out of the 85 respondents, 54 or 63% were from Luzon. Sixteen (16) respondents or 19% were from the Visayas, while 15 respondents or 18% were from Mindanao. Since RDA seminars and trainings are more commonly conducted in Metro Manila, it might have an effect on the responses. Respondents from Luzon might already have acquired prior knowledge about RDA. Also, since the researcher is from Manila, over half of the respondents were from neighboring regions within Luzon, because it is easier to reach respondents coming from nearby areas.

As mentioned in the first part of the paper, Hart (2010) gave several suggestions on how a library can prepare for the implementation of RDA. It includes determining the proper time when to implement the new cataloging standard and how to address budget issues that come with the subscription to the RDA Toolkit. Also, the need for training was raised—library staff need to be trained based on the degree and extent of cataloging they do in their library. Some libraries only opt for basic training. Some prefer to have their staff trained on how to use to toolkit and be trained on the new RDA vocabulary. Another important aspect libraries need to consider in preparing for the shift is the changes needed in terms of the library system to accommodate RDA improvements. Using Hart's (2010) statements as basis, ten questions on RDA implementation were asked. Each implementation statement is discussed below. Table 1 shows a summary of responses from the survey.

Table 1

Implementation Statements, n=85

Implementation Steps	Full Implementation (FI)	Current Implementation (CI)	No Implementation (NI)	Mean	StDev
1. Our library is in the stage of deciding whether to implement RDA or not.	33	33	19	2.16	0.77
2. Our library is acquiring materials about RDA, such as the RDA toolkit, etc.	42	25	18	2.28	0.80
3. Our library is planning for retrospective data changes for the shift from AACR to RDA.	13	37	35	1.74	0.71
4. Our library is addressing budget issues related to the shift from AACR to RDA.	16	33	36	1.76	0.75
5. Our library is examining possible system changes to optimize RDA changes.	27	31	27	2.00	0.80
6. Our library is testing RDA in our own cataloging practice.	30	24	31	1.99	0.84
7. Our library is training our librarians about RDA.	38	26	21	2.20	0.81
8. Our librarians are all already trained on RDA.	24	35	26	1.98	0.77
9. Our library is offering training and seminars to other libraries about RDA.	11	16	58	1.45	0.72
10. Our library is converting bibliographic records from AACR to RDA.	9	25	51	1.51	0.68

Note: Reprinted from "Resource Description and Access in Philippine Academic Libraries: A Study on Awareness, Acceptance, Perception and Implementation,", by Y. T. P. Santos, 2015.

1. Our library is in the stage of deciding whether to implement RDA.

The respondents of the study were asked if the institution they are currently employed in is deciding to implement RDA changes. Thirty-three (33) respondents said they have decided to implement RDA; another 33 said they are still in the process of deciding, while 19 said they have not decided yet whether to implement RDA or not. This is attributed to the librarians' feeling untrained on the new standard. Some expressed that they feel the need for more resources and training first before finally deciding to implement RDA. Respondents feel the need to fully implement it, but are still not sure how to start.

2. Our library is acquiring materials about RDA, such as the RDA toolkit, etc.

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Another step involved in the transition is concerned with the acquisition of RDA resources. These resources include the RDA toolkit and other publications and training manuals. Forty-two (42) respondents said that they have acquired materials related to the implementation of RDA. Some of the respondents even enumerated the materials they have acquired. Twenty-five (25) respondents said they are still in the process of acquiring, while 18 said they have not acquired RDA resources yet. Some of the respondents indicated in the comments section that they think RDA tools are costly and they see this as a drawback. Despite wanting to access the resources, some of the librarians mentioned having limited funding or incomplete infrastructure such as lack of computers or Internet access.

3. Our library is examining possible system changes to optimize RDA changes.

The fifth implementation statement is about the changes in the library system changes to accommodate RDA. Thirty-one (31) respondents said they are amidst examining possible system changes to accommodate RDA. Equal number of respondents, both at 27 each, said they have not examined system changes, and the same number of respondents said they have finished examining possible system changes that come with the implementation of RDA.

4. Our library is currently working towards retrospective data changes for the shift from AACR to RDA.

People unfamiliar with how RDA works are unsure whether they need to back track all their previous RDA records or not, this is reflected in some of the comments presented below. On the question of whether their respective institutions have planned retrospective data changes for the implementation of RDA, thirty-seven (37) out of 85 respondents said that they are currently in the process of planning data changes, while 35 said that they have not planned data changes from AACR to RDA yet. Thirteen (13) respondents said they are finished planning retrospective data changes. A number of respondents mentioned that they are actually working in a digital library style of institution where data change is not that pronounced. Some of the respondents indicated that they are still not aware on how to start revising their records and if there really is a need to retrace all bibliographic records or just start implementing RDA on new materials.

5. Our library is addressing budget issues related to the shift from AACR to RDA.

The fourth statement is about budget. The librarians were asked whether they have engaged in budgeting for future or tentative RDA implementation. Thirty-six (36) respondents said they have not addressed any budget issues for RDA yet. Thirty-three (33) said they are currently addressing budget issues, while 16 said they have addressed budget concerns related to the shift from AACR to RDA. In planning for the next fiscal year, the cost of training staff members; the purchase of manuals; and payment from participating in trainings have been considered as an added part of the library budget. Respondents claim to have informed their institutions on their intent to participate in RDA trainings, which led to budget being allotted to it.

6. Our library is testing RDA in our own cataloging practice.

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The respondents were asked if they are already implementing RDA in their own cataloging practice. Thirty-one (31) out of 85 said that they have not tested RDA in their respective institutions yet. Thirty (30) said they have tested RDA, while 24 said they are currently at the testing stage. Testing is important as it enables the institution to determine whether the library is ready for the change or not (Hart, 2010). A number of respondents mentioned training and testing RDA and eventually revising their cataloging policy as a result of their test. Upon checking, the said respondents were all from the University of the Philippines (UP). UP has created an RDA cataloging policy manual, and have already started disseminating information about the said policy set.

7. Our library is currently training our librarians about RDA.

Item number seven asked respondents whether the librarians in their respective institutions have already been trained on RDA. Thirty-eight (38) out of 85 respondents said that they have conducted in-house trainings on RDA for their librarians. Twenty-six (26) respondents indicated that they are currently having these trainings, while 21 said they have not started offering in-house trainings for their librarians yet. The ones who claimed to have conducted trainings are mostly from institutions in Metro Manila.

8. Our librarians are all already trained on RDA.

The researcher also asked the respondents whether their colleagues in their respective institutions have already been trained on RDA. Out of 85 respondents, 35 said that they are currently being trained on the new standard. The number of respondents who said that they are already trained and the number of respondents who said that they are not is almost equal. Upon checking, the trained ones were mostly respondents from Metro Manila and nearby provinces. It may be because the bulk of trainings done on RDA are in Metro Manila, hence, more participants coming from nearby locations.

9. Our library is offering training and seminars to other libraries about RDA.

Item number nine asked librarians at what stage they were currently in with regard to training external organizations and libraries on RDA. Fifty-eight (58) out of 85 respondents said that they have not engaged in providing external trainings for librarians from other institutions yet. Twenty-six (26) said they are currently offering trainings, while 11 said they have offered trainings in the past. The responses show that bigger institutions like academic libraries in Metro Manila have started training other libraries, while smaller libraries outside Metro Manila have not started training external partners yet.

10. Our library is converting bibliographic records from AACR to RDA.

The final item for the implementation part of the questionnaire is on the conversion of bibliographic records from AACR to RDA. Fifty-one (51) out of 85 respondents said they have not converted bibliographic records yet. Twenty-five (25) said they are currently implementing the conversion, while nine respondents said they are in the stage of full implementation. Thirty-one (31) respondents mentioned of not testing RDA yet, while 30 said they have tested RDA. Despite the

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previous statistics, only a small fraction of respondents have started converting their records to RDA.

When it comes to training aspects such as preparation for the adoption of RDA (Table 1, Items 1, 2, 7) the highest values were given to full implementation. The majority indicated that they have undergone full implementation. As defined in the survey, full implementation means they have completed the step. Item 3 in the questionnaire showed the highest number of responses in current implementation. This particular step is concerned with planning for RDA changes. There were only a little number of respondents who indicated they have taken no steps yet in both preparation and training. Looking at the other end of the table, (Table 1, Items 4, 9, 10), lower responses for full implementation are evident. This may be attributed to their previous responses that they are still in the process of preparing, training, and testing; or are already done preparing, training, and testing but are stalled. Thirteen (13) of the respondents have indicated in the comments portion of the survey that they are still waiting for the direct signal of their institutions to do a complete implementation of RDA. As for the remaining items in Table 1, it is difficult to create a conclusion since most responses given garnered equal values.

Also, based on the responses presented above, one thing is evident. Bigger academic institutions in Metro Manila indicated that they have indeed accomplished most of the implementation steps. Tracing all the responses, these bigger and more well-known institutions consistently indicated agreement with all the implementation steps above. These institutions, particularly those coming from Metro Manila admitted to having fully implemented most of the steps listed above. On the other hand, participating librarians coming from smaller institutions, most of which are found outside Metro Manila, have agreed to very few of these implementation steps, as most of them were still waiting to be trained.

Conclusion

RDA has been in the Philippines since 2011. Today, a great number of librarians have undergone trainings on the said code and are currently working on deciding whether to implement RDA in their respective institutions or not.

In summary, the responses indicated that a majority of the respondents said that their respective libraries have started to engage in RDA trainings. Other steps they have taken include changing pre-existing cataloging policies, applying changes to the library system, and acquiring RDA materials. The respondents who mentioned having started doing trainings and doing policy changes belonged to bigger libraries situated in Metro Manila. As for testing RDA, there is a balance between those who have tested it and those who have not. Finally, as for conversion of records, there is only a small number of respondents who have converted their records, while the remaining respondents have not started converting records. Looking at the bigger picture, it is evident that these academic librarians have taken small steps in their transition to RDA, making it clear that RDA, in terms of implementation is still in its early stages in the Philippines.

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