

RDA Toolkit en un curso canadiense de catalogación

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¡Buenos días! Gracias por la invitación para dar esta presentación.

Mi experiencia

- Bibliotecaria de metadatos, bibliotecas de la Universidad de Toronto
- Instructora de periodo de sesiones, Facultad de Información, Universidad de Toronto
- Directora de Educación y Orientación, RDA Steering Committee
- Miembro libre, Comité Canadiense de Catalogación
- Miembro del Grupo de Trabajo para el Entrenamiento RDA en Canadá



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¡Buenos días! Gracias por la invitación.

Thank you for the invitation to present at this conference. I am honoured to share my experience in teaching the RDA Toolkit in a Canadian cataloguing course.

My name is Elisa Sze, and I am a metadata librarian with the University of Toronto Libraries, the largest academic library system in Canada. I am also a sessional instructor at the University of Toronto, Faculty of Information, which is home to 1 of 8 ALA-accredited Library and Information Science programs in Canada.

My experience with training staff and teaching students to catalogue led me to join the RDA Steering Committee as their Education and Orientation Officer. I am also a Member-at-large on the Canadian Committee on Cataloguing, and I am part of a working group that is developing an RDA training program in Canada.

Contexto para esta presentación

- Esta presentación incluye consejos generales para enseñar RDA.
- Sin embargo, mi enfoque principal será compartir información sobre cómo enseño RDA en mi curso de catalogación en la Universidad de Toronto.
 - Muchas gracias a mis compañeros docentes pasados y actuales: May Chan (2021 & 2022), Juliya Borie (2023 & 2024) y Beth Shoemaker (2025).



El RDA Steering Committee en su reunión de noviembre 2024 en Washington DC. Foto: <https://www.rdatoolkit.org/news/rsc/Minutes/500-507>

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This presentation includes general tips for teaching RDA. If you have attended some of my presentations in the past, you may be familiar with some of the information that I share.

However, my main focus today will be on sharing information about RDA in my cataloguing course at the University of Toronto. I would like to take this opportunity to thank my past and current teaching partners: May Chan, Juliya Borie, and Beth Shoemaker. Many thanks as well to my translator for providing the Spanish translations you see on today's slides.

Programa de Maestría en Información (MI) en la Universidad de Toronto

- Este grado profesional a dos años evolucionó a partir de un programa de ciencias bibliotecarias establecido en 1928.
- Actualmente hay 8 especializaciones en el programa de MI.
- Es 1 de sólo 8 programas de Maestría acreditados por la ALA en Canadá (1 de 7 impartidos principalmente en inglés).



Facultad de Información, Universidad de Toronto. Foto:

<https://www.ischools.org/ischools-members/university-of-toronto>

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The Master of Information program at the University of Toronto is a 2-year professional degree program that evolved from a library science program established in 1928. Currently the MI program offers 8 concentrations, with library and information science being one of them. The program at Toronto is 1 of 8 ALA accredited Master's programs in Canada, and 1 of 7 to be taught primarily in English.

INF2145 Catalogación y la Creación de Datos Bibliográficos

- Este es un curso optativo en la especialización de Ciencias Bibliotecarias y de la Información.
- Co-imparto el curso con otro profesional.
- [Programa del curso](#) (escanear el código QR para verlo)
 - 12 semanas de clases x 3 horas por clase
 - 1 clase está dedicada al Library Reference Model (LRM) de la IFLA
 - 3 clases están dedicadas a RDA (RDA Toolkit oficial)
 - 2 clases están dedicadas a codificar datos RDA en MARC 21



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The course I teach in this program is called INF2145, Cataloguing and the Creation of Bibliographic Data. It is an elective course in the Library and Information Science concentration.

To view the course syllabus, please scan the QR scan on the slide. The course syllabus for this year has not yet been posted yet but you can go back in time to Winter 2021, the first time that the official RDA Toolkit was integrated into the course..

The course runs for 12 weeks from January to April, and each class is 3 hours long. My co-instructor and I dedicate 1 class to explaining concepts in the IFLA Library Reference Model, 3 classes on RDA (using the official RDA Toolkit), and 2 classes on encoding RDA data in MARC 21.

Los enfoques para la enseñanza de RDA dependen del tipo de programa educativo o de capacitación

 Cursos que hacen énfasis en la teoría	Cursos enfocados en los sistemas y esquemas de metadatos
 Cursos que ofrecen un ejercicio práctico en descripción de recursos	Formación en el trabajo para profesionales

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Approaches to teaching RDA depend on the type of program being taught. In my interviews with educators during my first 2 years on the RDA Steering Committee, I listened to educators describe their courses, and their philosophies about teaching cataloguing. Based on these conversations, I would categorize the types of programs as follows:

1. Courses that emphasize theory [top left]
2. Courses focused on metadata schemas and systems [top right]
3. Courses that offer hands-on practice in resource description (or “traditional” cataloguing courses) [bottom left]
4. And finally, “on the job” training for practitioners [bottom right]

Courses that emphasize theory focus on concepts and critical perspectives on cataloguing and classification rather than day-to-day practices. Courses that focus on metadata schemas and systems may briefly talk about RDA, but not with attention towards application of the standard. Courses that offer hands-on practice in resource description must simulate cataloguing experience but accept the limitations of time. On-the job training for practitioners often have to be geared very pragmatically towards the tasks that staff need to be able to complete immediately.

My course attempts to offer a blend of theory and hands-on practice.

Suposiciones	Enfoque pedagógico	Enfoque andragógico
El estudiante	El aprendizaje depende de la instructora. Los instructores evalúan el aprendizaje.	Aprendizaje autodirigido y autoevaluación.
Experiencia	Estudiantes no tienen experiencia.	Estudiantes tienen algo de experiencia.
Disposición	A las estudiantes se les dice qué manejar.	Cambios detonan la disposición para aprender.
Orientación	El aprendizaje sigue una narrativa o secuencia “natural” de contenidos.	El aprendizaje está organizado alrededor de tareas y problemas reales.
Motivación	Estudiantes están motivados por presiones externas (p.ej., calificaciones).	Estudiantes buscan autoestima y confianza.

Adaptado desde: Clayton Smith & Carson Babich. Capítulo 7.4 en *Theories of individual and collective learning*. <https://ecampusontario.pressbooks.pub/ticl/>. CC BY-SA 4.0

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For me, a useful framework for course design has been to differentiate between pedagogy and andragogy. Andragogy is a term introduced by Alexander Kapp (1799-1869), a 19th century German educator and editor. The concept was later developed into a theory of adult education in the 20th century by Malcolm Knowles (1913-1997), an American educator.

In the pedagogical approach, learning relies on the instructor, and the instructor is the one who evaluates learning. In the andragogical approach, learners are self-directed, and learners assess their own learning through self-evaluation tools.

In the pedagogical approach, students are assumed to have no experience in the topics taught, while in the andragogical approach, learners will have some experience.

In terms of readiness, the pedagogical approach requires the instructor to identify the learning outcomes to master, while the andragogical approach assumes that learners are willing to learn whenever a change occurs.

Pedagogical approaches often organize teaching around a sequence of topics that is natural to the subject. In the andragogical approach, learning is organized around specific real-life tasks and problems that need solving.

In the pedagogical approach, students tend to be motivated by external pressures such as grades or the need to pass a course or obtain a certificate or diploma. In the andragogical approach, learners are motivated by their self-esteem, and their need for confidence and self-actualization.

While introductory cataloguing courses tend to be taught with a pedagogical approach, such courses can be enhanced by incorporating tasks based on real-life situations—specifically because students want experience that they do not yet have. Conversely, job training programs tend to follow the andragogical approach, but some learners may appreciate best practices more when they understand underlying principles and can call

on an expert to review their work during the learning process.

Mi enfoque pedagógico en INF2145

- Complementar modos **pasivos** de aprendizaje con modos **activos** tales como toma de notas y discusiones en grupo y la aplicación práctica.
- Dedicar tiempo a guiar a los estudiantes a través de la práctica (incluyendo **como navegar** y **leer** RDA Toolkit estratégicamente) y retroalimentación. *Estas experiencias no pueden replicarse pidiendo a los estudiantes que lean un libro de texto o vean un video.*
- Utilizar aspectos del “salón de clases volteado” en nuestro enfoque.
- Resaltar puntos clave en clases pregrabadas (archivos de video mp4) y después reforzarlos durante la clase.
- La teoría es importante. Las estudiantes no serán expertas en 12 semanas, pero al darles tiempo para practicar la aplicación de la teoría y tendrán (1) un mejor entendimiento de la teoría y (2) retener principios subyacentes que les ayudaran a tomar estas decisiones.

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My pedagogical approach to INF2145 is to complement passive modes of learning (such as listening) with active modes such as encouraging group note-taking, facilitating group discussions, and creating opportunities for practical application.

I like to dedicate time to guide students through practice – including specifically how to navigate and read the RDA Toolkit strategically, and provide feedback. These experiences simply cannot be replicated by asking students to read a textbook or watch a video.

I like to utilize aspects of the “flipped classroom”. I create pre-recorded lectures (mp4 video files) in which I highlight key points in a lesson, which I then reinforce during our in-person class time.

Theory is important. Students will not be experts in 12 weeks, and they will forget the finer points of certain instructions. However, by giving them time to practice applying the theory, they will (1) have a better understanding of the theory, and (2) retain underlying principles that will help them make decisions.

Haciendo efectivo el “salón volteado”

- Nuestros estudiantes son estudiantes de posgrado. Muchos trabajan medio tiempo o han tenido otras carreras o títulos de grado antes de unirse al programa.
 - Por lo tanto, tienden a ser disciplinados y entienden la cantidad de esfuerzo que involucra prepararse para una clase a nivel universitario.
- Mi co-instructor y yo publicamos diapositivas de clase antes de la clase y generalmente proveemos oportunidades para su aplicación en cada clase.
- Los estudiantes tienen que estar dispuestos a completar las lecturas obligatorias y a ver las presentaciones anteriores a la clase, pero reconocemos que también es necesario algo de repaso dirigido por la instructora.

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The “flipped classroom” approach does not guarantee success though. The only reasons why my co-instructor and I have been able to make successful use of flipped classroom techniques are because:

- (1) Our students are graduate students. Many work part-time or have had other careers or graduate degrees before joining the Master program. Therefore, our students tend to be disciplined, and they understand the amount of effort involved in preparing for a class at the university level.
- (2) My co-instructor and I post our slides before class, and generally provide opportunities for students to apply what they learn in each class.
- (3) Students have been willing to complete required readings and watch the pre-class lectures prior to class, but we recognize that some instructor-led review is also necessary, especially during the busiest moments of the academic term.

¿Qué constituye un salón volteado?

- Las estudiantes ven una breve clase en video (entre 20-25 minutos) y completan lecturas obligatorias antes de clase.
- El principio de la clase es un repaso, incorporando preguntas de evaluación formativas que refuerzan ciertos puntos clave.
- Actividades en clase:
 - Las actividades dirigidas por la instructora nos dan más control sobre el uso del tiempo, pero requieren más facilitación de nuestra parte.
 - Pequeñas actividades grupales dan más libertad a los estudiantes, pero ellos deben ser proactivos y disciplinados en sus uso del tiempo para que sea efectivo.
 - Demostraciones dirigidas por la instructora son valoradas por las estudiantes porque las estudiantes aprenden con el ejemplo cómo consultar, leer e interpretar RDA Toolkit.
 - Una hoja de respuestas es publicada después de clase para que los estudiantes la consulten.

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What constitutes a flipped classroom?

Typically, we post a short video lecture (between 20-45 minutes long) that we ask students to watch before coming to class. The videos are posted one week in advance, so that students can gauge their time. We also ask students to complete required readings before class. The required readings almost always come directly from the standard, because we want students to explore the RDA Toolkit and attempt to decipher the language of the text before we do a guided walkthrough in class.

The beginning of each in-person class consists of a review, incorporating formative assessment questions that reinforce certain key points.

Class time is valuable, because we can set up activities that require students to apply their understanding of RDA:

- Instructor-led activities gives us more control over use of time, but it also requires more facilitation on our part.
- Small-group activities give students more freedom to explore on their own, but they have to be pro-active and disciplined in their use of time in order for these exercises to be effective.
- Instructor-led demonstrations have been valued by students because students learn by example how to consult, read, and interpret RDA.
- An answer key is published after class for students to consult.

Contenido LRM & RDA en INF2145

Tema	Objetivos de la instructora
(Semana 2) LRM IFLA e Introducción a RDA Toolkit	• Destacar conceptos LRM encontrados en RDA • Enfatizar las entidades de recurso • Demostrar cómo encontrar páginas de Entidades y Guías en RDA Toolkit Clases pregrabadas: • Una breve historia del control bibliográfico • Modelo conceptual: LRM IFLA

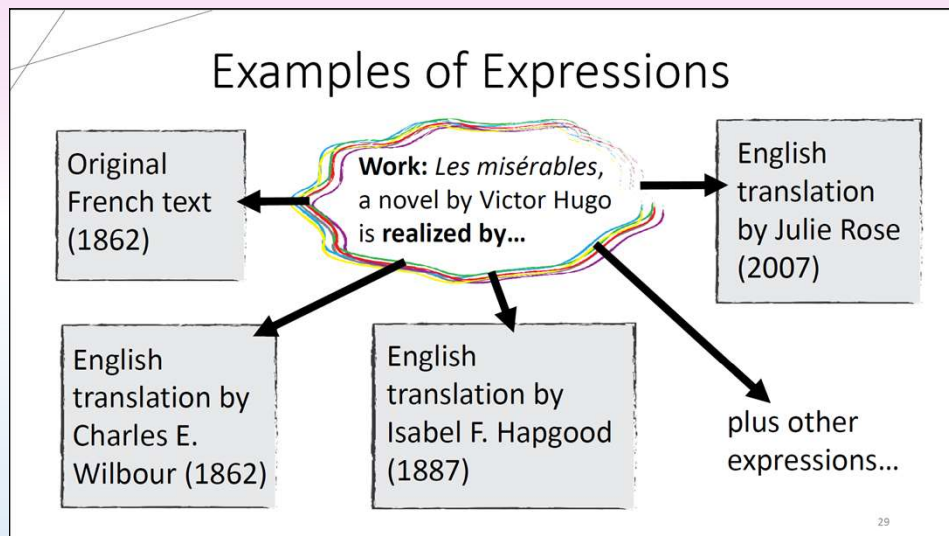
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Now I will talk about how I specifically organized the classes on RDA.

To “set the scene”, I introduce students to the IFLA Library Reference Model, highlighting important concepts such as the entity-relationship model, the purpose of attributes and relationships, and the entities themselves. I place greater emphasis on the resource entities Work, Expression, Manifestation, and Item because these entities inform cataloguing decisions right from the outset and will resurface in RDA.

Note that the pre-recorded lecture video links are live, and you are welcome to view them. The production quality is not high because I used Zoom to record my videos, but the quality has been sufficient for the purpose.

Introduciendo a los estudiantes a las entidades de recursos, basándose en un ejemplo mencionado en Holden (2020)



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In the rest of this presentation, I will show you sample slides from my course. Sample slides will be presented against this pink and blue backdrop.

Taking an example of a famous “work” [obra] mentioned in a pre-recorded lecture video, I build upon the example to explain the other resource entities – Expression [Expresión], Manifestation [Manifestación], and Item [Ítem].

Contents to point out:

- A work can be realized by many expressions, as illustrated by the grey boxes on the slide. Each box stands for an expression.
- Each expression is known by the language, and its translator. Each expression is also associated with a date of when the translation came into existence.

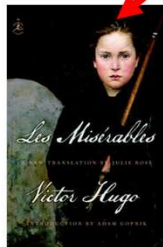
Article referenced:

Holden, C. (2020). The Bibliographic Work: History, Theory, and Practice. *Cataloging & Classification Quarterly*, 59(2–3), 77–96.
<https://doi.org/10.1080/01639374.2020.1850589>

Siguiendo el mismo ejemplo en las demás entidades de recurso

Examples of Manifestations

Les misérables, the English expression that is the Julie Rose translation (2007) is **embodied by...**



Vintage
Classics
publication
(2008 for
Canadian
market)



Vintage
Classics
publication
(2009 for UK
market)

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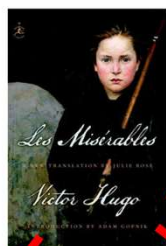
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Selecting one of the examples of expression shown on the previous slide, I show students 2 different manifestations that embody the same expression.

Key point to highlight is that even though we have the identical expression, and even an identical publisher agent, we see 2 different manifestations because each publication has a different publication year, and was published for a different market.

Siguiendo el mismo ejemplo en las demás entidades de recurso

Examples of Items



Vintage Classics publication (2008 for Canadian market)

This manifestation is **exemplified by...**

A copy at
Robarts Library

A copy at E.J.
Pratt Library

A copy at Toronto
Reference Library

plus
others...

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Building off the same example, we select one of the manifestations, and look at multiple items that exemplify the same manifestation: I highlight different copies of the same manifestation, held at different libraries.

Identificando las entidades de recurso a través del juego de rol

Identify the WEMI entities in this scenario

User: Hi, do you have *West Side Story* here?

Reference staff: Are you looking for one of the movies, the musical, or audio recordings?

User: I want the old movie. I want to compare it with the new one directed by Steven Spielberg.

Reference staff: Let me see... You want the 1961 movie adaptation of the musical then. Starring Natalie Wood and Richard Beymer, directed by Robert Wise. Is that the one?

User: Yeah, that's it!

Reference staff: With your library card, you can access the 1961 adaptation through our library subscription of the Criterion Collection, an online streaming service.

User: Do you have it on DVD? My Internet at home is kind of slow.

Reference staff: Unfortunately, we only have one DVD copy and it's checked out until next week. If you'd like, you're welcome to stream videos on one of the public terminals here.

User: In that case, can you show me how to get to the Criterion Collection?

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To change the atmosphere and engage students, I have students do a short role play [juego de roles]. 2 volunteers read the script out loud. Then, as a group, we identify all the unique instances of work, expression, manifestation, and item that are considered during this dialogue.

Contenido LRM & RDA en INF2145

Tema	Objetivos de la instructora
(Semana 3) Sesión RDA 1: Introducción a la Descripción	- Definir entidades y elementos RDA; 4 métodos de registro; 2 métodos de transcripción - Leer instrucciones seleccionadas de RDA con los estudiantes para explicar cómo “analizar” el lenguaje técnico + fraseo único - Practicar la descripción utilizando un perfil de aplicación + un libro real Clases pregrabadas: Cómo leer una página de elemento Nomens y apelativos Perfiles de aplicación

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In Week 3, we dive into RDA. I define RDA entities and elements, discuss the 4 recording methods and 2 transcription methods. In this week, I try to demonstrate how to search in RDA Toolkit, how to read and “parse” the technical language and unique phraseology of RDA. We also examine the course application profile, and start to use the application profile to assist us with description of a real book.

The pre-recorded lectures that students watch before coming to class are listed on this slide.

Repasando el entendimiento de entidades LRM de las estudiantes

Formative Assessment

Which of the following are “resource entities”?

Res

Nomen

Manifestation

Person

Agent

Expression

Collective Agent

Work

Item

Time-span

Place

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Formative assessments are designed for students to quickly check their grasp of new, foundational information in a low pressure, ungraded environment.

In this example, we asked students to identify the LRM “resource entities”, because those entities would be the ones that students would most often describe in the context of our course.

Elementos

- ¿Qué son los elementos? ¿Cuáles elementos se requieren para una descripción mínima?
- Distinguir **supertipos de elemento RDA** (elementos más amplios) de **subtipos de elemento** (elementos más reducidos)
 - Instrucciones que son propias de un supertipo de elemento aplican “hacia abajo” a sus subtipos de elemento.
- Capacitar a estudiantes para leer la **Definición y Alcance** y buscar la tarjeta de **Referencia de Elemento**

The screenshot shows the RDA Element Reference Card for 'other title information'. At the top, it says 'Entities > Manifestation > other title information'. Below this is the title 'other title information' in blue. Underneath is the section 'Definition and Scope' with the text: 'A word, character, or group of words or characters that appears in conjunction with, and is subordinate to, a title proper of a manifestation.' Below this is the 'Element Reference' section, which includes the IRI 'http://rdaregistry.info/Elements/m/P30142', the Domain 'Manifestation' with a link icon, and the Alternate labels 'has other title information'. At the bottom, there is a '+ IFLA LRM' link.

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For students new to entity-relationship models, and classes and properties, a very basic question to answer is “What are elements?” Next, is the question of “Which elements do we need to record when describing resources?” and “What is minimally required?”

As you know, RDA offers many choices. To choose which elements to record, students have to be shown that there is a hierarchy of element supertypes and element subtypes.

Instructions pertaining to an element supertype apply “down” to its element subtypes (if you are familiar with Dewey Decimal Classification, this is similar to the principle of “structural hierarchy”)

Instructors guide students in the choice between “broader” and “narrower” elements according to the data environment selected for the course.

The Element Reference Card, visible on every element page, includes key information; I try to be very deliberate in bounding out information in the Definition and Scope and the Element Reference card because from experience, I have seen students and cataloguers rush ahead to the record methods and many options without checking if they are at the correct element.

Demostrar cómo navegar RDA Toolkit

Características básicas a destacar para los estudiantes:

- **Páginas de ayuda:** “Navegando RDA Toolkit”, “Buscando RDA Toolkit”
- **Capítulos de guías:** Cambiar entre vista “Por defecto” y vista de “Orientación”.
 - Leer todas las páginas asociadas con “[Introducción a RDA](#)” y “[Terminología](#)”.
- **Páginas de entidad:** Señalar “Definición y alcance”, “Descripción mínima”, “Límites de entidad” y “Elementos”.
- **Mostrar cómo buscar** por etiquetas de referencia de elementos o etiquetas alternas y cómo filtrar resultados de búsqueda.
- Enseñar cómo mostrar **declaraciones de política**.

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Students should also be shown how to navigate the Toolkit
Point out Help pages, so that students learn to use the Toolkit as an online reference tool.

Point out Guidance chapters, which provide important background information as well as general instructions around resource description
The default arrangement of the guidance chapters is mainly alphabetical, but as of the September 2023 release, an “Orientation view” (arranged thematically) can be turned on.

Show students the Entity pages

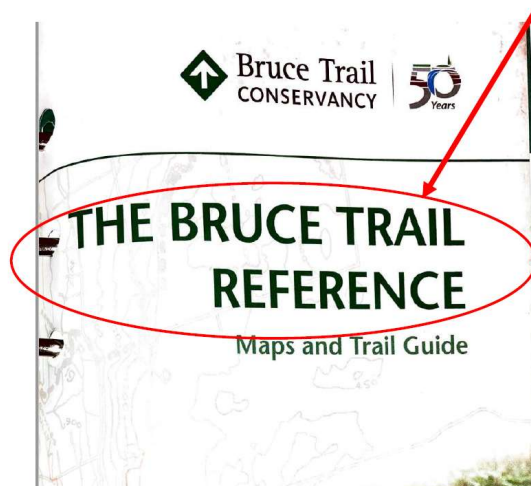
Point out the Minimum description requirements, and the list of Elements describing the domain entity

Students who have grown up with the Internet are very comfortable with searching, and using Search boxes to locate information almost as a natural reflex. Show them how to search by element reference labels or alternate labels, and to filter results.

Finally, explain the difference between the RDA base text (which refer to the entity pages, element pages, and Guidance chapters) versus the Community Resources area of the Toolkit.

Evaluaciones de baja presión durante el tiempo de clase

If we transcribed the circled text exactly as we see on a resource, which **recording method** are we applying?



- a) Unstructured description
- b) Structured description
- c) IRI
- d) Identifier

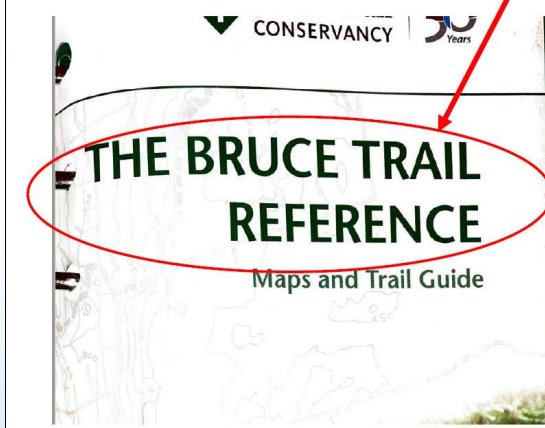
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In this example from Week 3, I wanted to test students' ability to distinguish between different RDA recording methods... This may seem like a basic question, but asking the question ensures that all students are starting from the same foundation.

Evaluaciones de baja presión durante el tiempo de clase

If we transcribed the circled text as
The Bruce Trail reference
which transcription method are we following?



- a) Basic transcription
- b) Normalized transcription
- c) IRI

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... Similarly, this question was asked to ensure that students understood the difference between transcription methods.

Variando las actividades en clase

Objetivo:
Incentivar a las estudiantes a moverse por el salón y hablar sobre RDA entre ellas.

In-Class Activity: Reviewing How to Read an Element Page

Instructions

You have been given a print-out of either an RDA entity label or an RDA element reference label.

Your task:

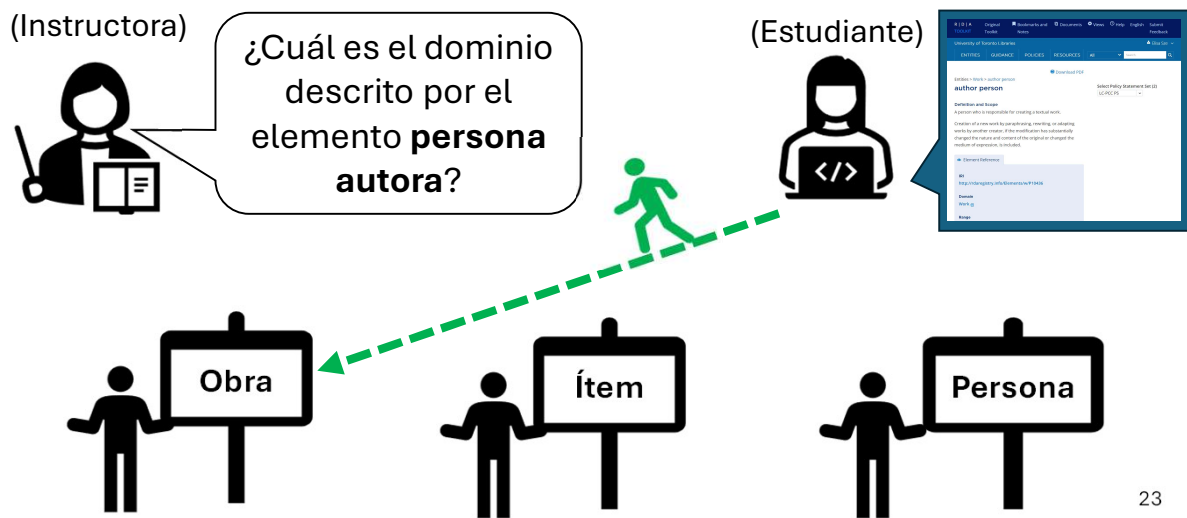
- If you have an RDA entity label, stand at the front or sides of the classroom, and hold up your sign so that your entity label is visible.
- If you have an RDA element label, look up the domain entity for your element, then join your domain.

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Other examples of formative assessment included in-class activities and exercises that forced students to look up information in RDA Toolkit, interact with their colleagues, and move around in the physical classroom.

In this activity, I used physical motion as a way of keeping students alert in our evening class, but students also found it memorable.

Pedir a los estudiantes que relacionen elementos con sus entidades de dominio. El movimiento físico es utilizado para reforzar el aprendizaje.



Here is an in-class activity that we introduced about RDA entities and elements. The physical activity took advantage of the “brain-body connection”.

As the instructor, I assigned each student a sign containing the reference label of an entity, or the reference label of an element. [See the top left quadrant of the diagram.]

Students with an entity label were asked to stand in front of the classroom. [See the bottom half of the diagram.]

Students with an element label were asked to log into RDA Toolkit to look up the domain entity described by their element, and then to walk over to their domain entity. [See the green diagonal line running across the middle of the diagram.]

In doing this, students learned how to look up the element reference card within an element page. They also learned about domain versus range.

In the example I have illustrated here, the student has been assigned the element “author person”. They must determine whether the domain described by this element is Work, Item, or Person. After they have made the determination, they walk over to the correct entity.

Perfil de aplicación: personalizado para el curso

	A	B	C	D	E	F	G	H	I
	RDA Element	Repeatable Element	Domain	Range	Recording method	If Structured Description: Vocabulary Encoding Scheme or String Encoding Scheme	If Unstructured Description: Transcription Method	Additional Comments	
1									
2	Identifying Manifestations and Items								
3	title of manifestation		Manifestation					This is an element supertype. Record instead the element subtype "title proper", and if applicable, "variant title of manifestation".	
4	title proper	yes	Manifestation	Nomen	unstructured	not applicable	normalized		
5	other title information	yes	Manifestation		unstructured	not applicable	normalized		
6	statement of responsibility relating to title proper	yes	Manifestation		unstructured	not applicable	normalized		
7	variant title of manifestation	yes	Manifestation	Nomen	unstructured	not applicable	normalized		
8	mode of issuance	no	Manifestation		structured	RDA VES: Mode of Issuance	not applicable		
9	identifier for manifestation	yes	Manifestation	Nomen	identifier	not applicable	not applicable	For URLs of online resource, see the element "Uniform Resource Locator".	
10	edition statement	yes	Manifestation		unstructured	not applicable	normalized		
11	publication statement		Manifestation					This is a superelement. Follow RDA instructions for recording the subelements "place of publication", "name of publisher", "date of publication".	
12	place of publication	yes	Manifestation	Place	unstructured	not applicable	normalized		
13	name of publisher	yes	Manifestation	Nomen	unstructured	not applicable	normalized		

Perfil de Aplicación RDA para las Semanas 3-5

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I strongly recommend developing an application profile for your students to consult. Otherwise, students will feel overwhelmed by the high number of elements available in RDA.

This Application Profile is available for you to view until April 8, using the link embedded in the slide.

- The file is customized for the course. It is not a “real” application profile in this sense, but it covers everything that students need to know to describe a print book for their first graded assignment.
- It takes time to draft an application profile. The version shown here is the result of many iterations that my co-instructor and I have improved on with each passing year.

Ejemplos que los instructores pueden consultar antes de desarrollar su propio perfil de aplicación

- eCourse de la ALA “A Practical Approach to New RDA” [plantilla](#), Elisa Sze & May Chan (Agosto 2022)
- [Perfil de aplicación de la Draft Music Library Association](#)
- Súperconferencia de la Ontario Library Association, taller pre conferencia ([2023](#), [2024](#) y [2025](#))
- [Ejemplo de Webinar de RDA Toolkit](#), Melissa Parent (Octubre 2021)
- [Perfil de aplicación Cataloguing-in-Publication Metadata](#) de la Biblioteca Nacional de Nueva Zelanda
- [RDA DACH Anwendungsprofile](#) (Versión: 2024/2)

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Application profiles help to focus students’ attention by identifying key elements to record, thereby reducing students’ cognitive load. An application profile specifies the entities, elements, and vocabulary encoding schemes that are expected in a set of metadata. It provides students with a structure or roadmap for resource description.

Some educators may find the concept confusing, because they think that an application profile has to be a complex set of specifications for computer systems, but for teaching purposes, an application profile can be as simple as a list of assigned elements or a template for students to fill in.

The application profile can also specify recording methods, transcription guidelines, policy statements to follow, external guidance documents to consult in conjunction with RDA text, and sources of controlled vocabulary.

On this slide are links to examples that you can look at.

Contenido LRM & RDA

Tema semanal	Objetivos de la instructora
(Semana 4) Sesión RDA 2: Elementos	• Explicar nomens y apelativos • Trabajar con los estudiantes a través del proceso para construir puntos de acceso autorizados para Persona, Organismo corporativo, Obra y Expresión. Enfatizar los patrones en el proceso. • Enseñar a los estudiantes las características de estándares de legado (Ejemplo: Registros creados de acuerdo con instrucciones de AACR2) • Clase pregrabada: Control de Autoridad

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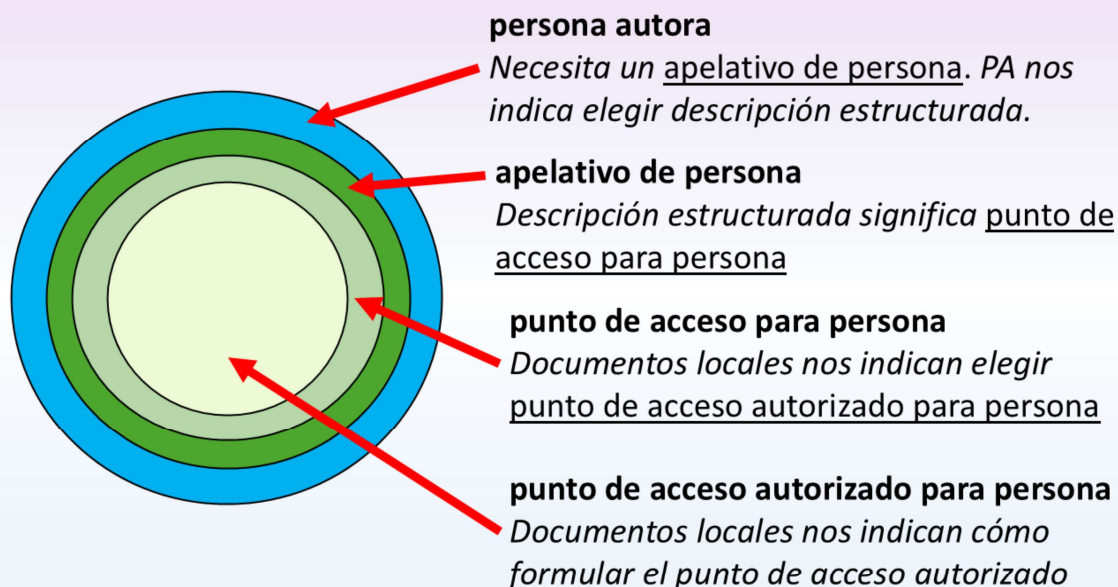
In Week 4, we review the concept of nomen and appellations again. This is because the concept of Nomen is difficult to grasp, even for experienced cataloguer, and I want to be sure that students will not feel “stuck” because they cannot understand what a nomen is.

In this week, I show students how to think through the process of constructing authorized access points for Person, Corporate Body, Work, and Expression. Emphasizing patterns in the process can be invaluable for learning.

We also dedicate some time to showing students the features of legacy standards, as seen, for example, in records created according to AACR2 instructions.

The pre-recorded lecture focuses on “Authority control”.

(Diapositiva muestra) Registrando un valor para: persona autora



Here is a sample diagram depicting the explanation I provide to students. In this diagram of concentric circles, I guide student through the instructions for determining the value of the element “author person” [persona autora].

- Where you are required to record a value for the element “author person”, you will:
 - >> Navigate to “appellation of person”
 - >> Then to “access point for person” (because access point = “structured description”)
 - >> Then to “authorized access point for person” (because “authorized” = selected for preference over variant access point)

At this point, I will have an example of an author person, and ask students to help me identify a suitable appellation for that person.

(Diapositiva muestra) ¿Qué es una persona?

- **Definición:** “Un agente que es un ser humano individual **que vive o se asume que ha vivido.**”

- **Descripción Mínima:**

- **Apelativo de persona**

- Nombre de persona

- Nombre preferido de persona

- Punto de acceso para persona

- **Punto de acceso autorizado para persona**

- Identificador para persona

Escenario C de implementación RDA: Registramos en un **registro de autoridad de nombre** elementos que describen al **agente** (Nota: No estamos construyendo registros de autoridad de nombre para esta clase)

El valor de este elemento es lo que enchufamos al **registro bibliográfico** para explicar la relación entre **el recurso descrito** y el rol del agente en el recurso

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In this slide, I explain to students “What is a person?”

Definition: A person is “An agent who is an individual human being who lives or is assumed to have lived.”

I point out to students the “Minimum description” area of the Person entity page. We look at name of person, access point for person, and authorized access point for person. I explain that because we are enacting the RDA Implementation Scenario C, bibliographic and authority data, we record the access point for the agent as found in our preferred source for name authority records.

(Diapositiva muestra) Punto de acceso autorizado para persona

RDA Toolkit:

Desplázate hacia abajo hasta que veas “**Puntos de acceso autorizados base para persona**”.

¡El PAA base es tu punto de partida!

For general guidance on structured descriptions, see Guidance: Recording methods. [Recording a structured description](#) →

- **Base authorized access points for person** →
 - [Persons with two or more preferred names](#) →
- **Format of base authorized access points for person** →
 - [Names of person that include a surname](#) →
 - [Preferred names of person that include a compound surname](#) →
 - [Preferred names of person that include a surname with a separately written prefix](#) →

In this next slide, I show students how to identify the “base authorized access point for person”. I emphasize that the base authorized access point serves as our starting point for creating an authorized access point.

(Diapositiva muestra) Punto de acceso autorizado para persona

Aún bajo “Punto de acceso autorizado base para persona”...

“Utilizar un **valor de** Persona: **nombre preferido de persona** para formar un punto de acceso base.”

Base authorized access points for person	
OPTION Use a value of Person: preferred name of person to form a base access point.	Send to Back LC-PCC LC/PCC practice: Apply the option.

“Nombre preferido” = preferido para uso = implica convenciones culturales. Ir a la página **nombre preferido de persona** para ayudarte a determinar cuál debe ser el nombre preferido **si** la persona tiene 2 o más nombres, nombres en 2 o más idiomas, nombres en una escritura no preferida o nombres con 2 o más ortografías.

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This slide continues the explanation about base authorized access point for person. The instruction RDA Toolkit states “Use a value of Person: preferred name of person to form a base access point.” I explain here that “preferred name” means “preferred for use”, which implies cultural conventions. I point out to students that they will need to go up one level to the element page for “preferred name of person” to help them determine what the preferred name should be if a person has 2 or more names, names in 2 or more languages, name in a non-preferred script, or names with 2 or more spellings.

(Diapositiva muestra) Punto de acceso autorizado para persona

Aún bajo “Punto de acceso autorizado base para persona”...

“Utilizar un valor de Persona: **nombre preferido de persona** para formar un punto de acceso base.”

Base authorized access points for person	
OPTION Use a value of Person: preferred name of person to form a base access point.	Send to Back LC-PCC LC/PCC practice: Apply the option.

“Nombre preferido” = preferido para uso = implica convenciones culturales. Ir a la página **nombre preferido de persona** para ayudarte a determinar cuál debe ser el nombre preferido **si** la persona tiene 2 o más nombres, nombres en 2 o más idiomas, nombres en una escritura no preferida o nombres con 2 o más ortografías.

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[[click to animate the red circle]]

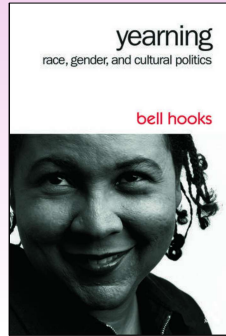
(Diapositiva muestra) Determinar **nombre preferido de persona**

- Algunas veces, el **nombre preferido de persona** tiene el mismo valor que el valor para **nombre de persona**, pero... los nombres son complejos porque las personas son complejas.
- Lee las condiciones enlistadas para este elemento y entonces decide cuál opción seguir. Privilegia la práctica LC-PCC cuando esté enlistada. Condiciones:
 - Personas con dos o más nombres
 - Nombres de persona en dos o más idiomas
 - Nombres de persona en una escritura no preferida
 - Nombres de persona en dos o más ortografías
- Adicionalmente, es posible que necesites revisar condiciones más amplias bajo el supertipo de elemento (p.ej., un elemento más amplio) **nombre de persona**

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In this slide, I summarize some of the common issues students may encounter when attempting to distinguish a “preferred name of person” from a “name of person”.

(Diapositiva muestra)
¿Cuál es el **nombre preferido**?



Gloria Jean
Watkins

bell hooks

Feminista, activista y académica estadounidense. Nació en 1952, murió en 2021. Nombre de nacimiento: Gloria Jean Watkins. Publicó bajo el seudónimo bell hooks.

Pista: Nombre predominante

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This is a sample slide. I show students the 2 names presented on the right side of this slide, then I ask students to answer the question “What is the preferred name?” Is it “Gloria Jean Watkins” or is it “bell hooks”?

I ask students to answer according to Library of Congress Program for Cooperative Cataloguing (or LC PCC) policy statements.

I give them a hint that they need to look up instructions about **Predominant name**.

https://access.rdatoolkit.org/en-US_ala-08a3dcc9-4cb0-355c-bf4f-adae2c63e5f6/p_opm_c34_wfb

After students read the Condition: “Two or more values of a name appear in sources of information” and the Condition Option: “Record a value that appears most frequently in sources of information”, they should see the LC-PCC policy statement: “Cataloger’s judgment.”

Answer: bell hooks

Gloria Jean Watkins would be recorded as a variant access point for the person in the name authority record for the person, but not be used in a bibliographic record itself.

If you look up “name of person” >> “variant name of person” >> Option:

“Record a value that is considered important for identification and that differs from a preferred name.”

https://access.rdatoolkit.org/en-US_ala-e0529844-86d7-3cad-a811-6471b8844da4/div_ed5_yfd_vgb

(Diapositiva muestra)
¿Cuál es el **nombre preferido**?

Poeta chino de la dinastía Tang. Nació en 701, murió en 762. 李 (Li) es el apellido del poeta. Asumiendo que estamos catalogando en inglés y que la escritura preferida es la latina.

Pista: Ver Nombres de persona en una escritura no preferida



Li Bai

李白

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This is a sample slide.

Here I ask students to tell me again, “What is the preferred name?” The hint I emphasize here is that students want to find instructions about a **Name of person in a non-preferred script**.

https://access.rdatoolkit.org/en-US_ala-08a3dcc9-4cb0-355c-bf4f-adae2c63e5f6/p_ywx_ln4_wfb

I point out the Condition: “A value of a name appears in a script that differs from a script that is preferred by an agent who creates the metadata.” And the Condition Option: “Record a value that is in a script that is preferred by an agent who creates the metadata.”

There is an LC-PCC policy statement that says: “Apply the option. The preferred script is the Latin script. When transliteration is necessary, follow the ALA-LC Romanization Tables...”

Answer: Li Bai

李白 would be recorded as the alternative script, if the system permits parallel fields to be added for alternative scripts in a bibliographic record. It may also be recorded as a variant access point in the name authority record for this person, but not appear in the bibliographic records describing the works of this person.

If you look up “name of person” >> “variant name of person” >> Option: “Record a value in a script that differs from a preferred name.”

https://access.rdatoolkit.org/en-US_ala-e0529844-86d7-3cad-a811-6471b8844da4/div_r43_zfd_vgb

(Diapositiva muestra) **Formatea el PAA base, añade elementos según necesidades**

- Formatea el PAA base – **lee las condiciones**
 - Nombres que incluyen un apellido
 - Término de rango de nobleza
 - Sin apellido ni término de rango de nobleza
 - Patronímico
 - Iniciales, letras separadas, numerales
 - Nombre consiste en una frase

¡Consulta nuestro impreso “Esquemas de Codificación de Secuencia”!

El esquema de codificación de secuencia LC-PCC es **Apellido, Nombre de pila** a menos que se indique lo contrario.

- Añade elementos según necesidades. Algunas opciones...
 - Fecha de nacimiento
 - Fecha de muerte
 - Forma más completa de nombre
 - Periodo de actividad
 - Profesión o ocupación

Política LC-PCC: Añadir fecha de nacimiento/muerte si se conoce, independientemente de si se necesitan fechas para resolver un conflicto.

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This is a sample slide. Note that many of the string encoding schemes reference LC-PCC policies because in our course, we refer to the LC-PCC policy statement set to complement RDA.

We introduce students to a String Encoding Scheme handout that we designed specifically for this course. The purpose of developing a SES handout is to reduce the cognitive load for students so that they do not have to consult the PCC MGD or other external guidance documents.

In the absence of SES, students can also consult RDA Toolkit > Resources > [Community resources](#) > [Community refinements](#) > [Person refinements](#) > [authorized access point for person: Anglo-American legacy instructions](#)

(Diapositiva muestra) Determinando el **título preferido de obra**

- Modern work (published in 1501 or later)
- Title proper of manifestation:
White teeth
- Manifestation has no variant title
- Single author
- Value for preferred title of work = value for title proper of manifestation

¿Título preferido de obra?

White Teeth

A NOVEL

Zadie Smith

VINTAGE
INTERNATIONAL
VINTAGE BOOKS
A DIVISION OF RANDOM
HOUSE, INC.
NEW YORK
2001

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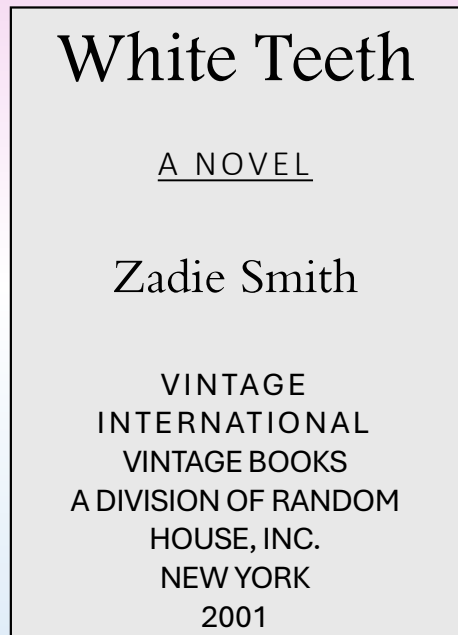
In this slide, I ask students to tell me what is the “preferred title of work” according to the LC-PCC policies that we have learned?

(See next slide for multiple choices)

(Diapositiva muestra) Determinando el **título preferido de obra**

¿Cuál es el **título preferido de obra**?

- a. White teeth
- b. White teeth : a novel
- c. White teeth : a novel / Zadie Smith



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What is the preferred title of work?

- a) White teeth
- b) White teeth : a novel
- c) White teeth : a novel / Zadie Smith

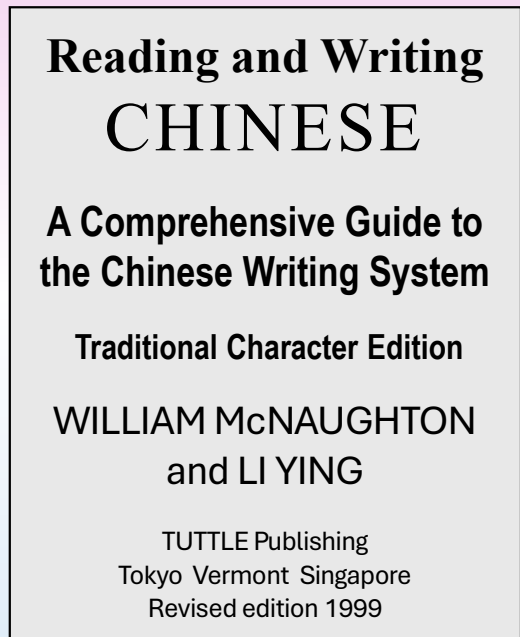
--

(A) is correct the answer.

(Diapositiva muestra) Determinando el **título preferido de obra**

- Obra moderna
- ¿Título propio de manifestación?
- ¿La manifestación tiene títulos variantes?
- 2 autores

¿Título preferido de obra?



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What is the preferred title of work?

See next slide for multiple choices.

(Diapositiva muestra) Determinando el **título preferido de obra**

¿Cuál es el título de obra?

- a. Reading and writing Chinese, a comprehensive guide to the Chinese writing system
- b. Reading and writing Chinese
- c. Chinese

**Reading and Writing
CHINESE**

**A Comprehensive Guide to
the Chinese Writing System**

Traditional Character Edition

**WILLIAM McNAUGHTON
and LI YING**

TUTTLE Publishing
Tokyo Vermont Singapore
Revised edition 1999

What is the preferred title of work?

- a) Reading and writing Chinese, a comprehensive guide to the Chinese writing system
- b) Reading and writing Chinese
- c) Chinese

--

(B) is the correct answer

(Diapositiva muestra) Determinando el **punto de acceso autorizado para obra**

Ejemplo: Obra sola, 1 autor

Título preferido de obra:

The secret place

Punto de acceso autorizado para agente:

French, Tana

Punto de acceso autorizado para obra:

French, Tana. The secret place



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We provide students with a “string encoding schemes” handout that tells them how to construct authorized access points for works, expressions, and agents.

(Diapositiva muestra) Determinando el **punto de acceso autorizado para obra**

Ejemplo: Obra sola, 2 autores

Determinar el autor primario

Título preferido de obra:

Puntos de acceso autorizado para agentes:

McNaughton, William, 1933-
Li, Ying (Marie Li)

Punto de acceso autorizado para obra:

**Reading and Writing
CHINESE**

**A Comprehensive Guide to
the Chinese Writing System**

Traditional Character Edition

**WILLIAM McNAUGHTON
and LI YING**

TUTTLE Publishing
Tokyo Vermont Singapore
Revised edition 1999

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Using that handout, I ask students to look at this title page, and then determine “What is the preferred title of work?”, “What is the authorized access point for each agent?” and finally, “What is the authorized access point for work?”

(Diapositiva muestra) Determinando el **punto de acceso autorizado para obra**

¿Cuál es el **punto de acceso autorizado para obra**?

- a. Reading and writing Chinese
- b. McNaughton, William, 1933-. Reading and writing Chinese
- c. Li, Ying (Marie Li). Reading and writing Chinese

**Reading and Writing
CHINESE**

**A Comprehensive Guide to
the Chinese Writing System**

Traditional Character Edition

**WILLIAM McNAUGHTON
and LI YING**

TUTTLE Publishing
Tokyo Vermont Singapore
Revised edition 1999

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On the question of authorized access point for work, I would expect students to answer: (b)

(Diapositiva muestra) Registrando un valor para: **obra manifestada**



This is another example of how I use diagrams to explain the process of identifying the value of an authorized access point, and reusing that value for other elements like “work manifested”. The concentric circles diagram is very similar to the diagram I used to explain how we find the value of the element “author person”.

Contenido LRM & RDA

Tema semanal	Objetivos de la instructora
(Semana 5) Semana RDA 3: Relaciones Entre Entidades	• Explicar agregados de manera muy general para que las estudiantes reconozcan agregados cuando vean uno • Explicar obras diacrónicas de manera muy general para que los estudiantes reconozcan obras diacrónicas cuando vean una • Mostrarle a las estudiantes diferentes formatos materiales y hacerlos identificar atributos asociados con esos formatos • Clase pregrabada: Agregados

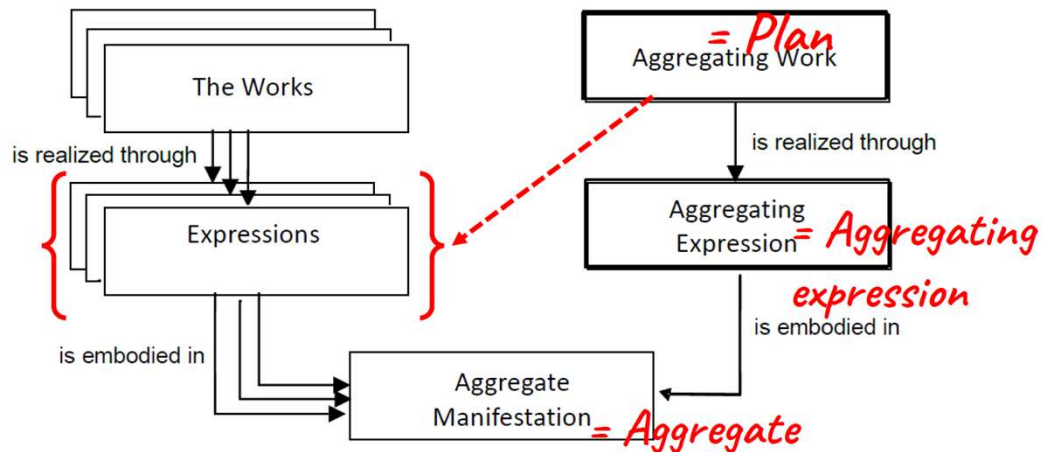
44

In Week 5, we talk about the more challenging topics of RDA: aggregates and diachronic works. The purpose is not to require students to know how to catalogue aggregates or diachronic works, but rather, to be able to recognize examples of aggregates and diachronic works when encountered.

We also set up an in-class activity where small groups of students examine a special format resource together, in order to propose attribute elements that are associated with those special formats.

IFLA LRM modelling of aggregates

Figure 5.7 General Model for Aggregates



Riva, Pat, Patrick Le Boeuf, and Maja Žumer. "Figure 5.7 General Model for Aggregates." In *IFLA Library Reference Model: A Conceptual Model for Bibliographic Information*, 94. The Hague: IFLA, 2017.

Here is a sample of a slide that I included in the review of aggregates.

This image is taken directly from the IFLA Library Reference Model document. We ask students to read this section of the LRM document.

Matrix: extension plan + mode of issuance

	Extension plan				
Mode of issuance	Static plan	Integrating determinate plan	Integrating indeterminate plan	Successive determinate plan	Successive indeterminate plan
Single unit					
Multiple unit					

See Week 5 Group Notes

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To help students learn about the concept of diachronic works, we also run an exercise where students are encouraged to cite real bibliographic examples based on the different extension plans possible.

Contenido LRM & RDA

Tema semanal	Objetivos de la instructora
(Semana 10) Sesión MARC 21 1: Resumen	Enseñar a los estudiantes cómo buscar la documentación de MARC 21, incluyendo el Formato para Datos Bibliográficos MARC 21 y listas de códigos • Enseñar a las estudiantes cómo encontrar mapeos de MARC 21 en el RDA Toolkit y en el perfil de aplicación personalizado para nuestro curso • Enseñar a los estudiantes cómo encontrar las puntuaciones de la Edición Consolidada de ISBD (2011) • Clase pregrabada: Codificando RDA en MARC 21

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In Week 10, we introduce students to MARC 21. We show students how to look up MARC 21 documentation, especially the Format for Bibliographic Data and associated code lists.

We also show students how to locate the RDA-to-MARC 21 mappings for themselves using the RDA Toolkit.

In MARC, certain ISBD punctuations remain important for correct identification of resources, so we also reference the Consolidated 2011 Edition for its punctations.

(Perfil de aplicación del curso con mapeos MARC 21)

	A	F	G	H	I	J
	RDA Element	If Structured Description: Vocabulary Encoding Scheme or String Encoding Scheme	If Unstructured Description: Transcription Method	Additional Comments	Potential MARC21 Bibliographic Tag(s) and Subfields (Fixed fields have not been mapped below)	
1	work manifested	Record value of: authorized access point for work	not applicable		Various ways depending on the resource, such as: 100/110/111 + 245 \$a, or 100/110/111 + 240 \$a, or 130, or 245 \$a, or 700/710/711 \$t + \$i work manifested, or 730 + \$i work manifested	
20	expression manifested	LCNAF if available / String Encoding Scheme handout	not applicable	Record only if the value for this element differs from the value for the Manifestation element "work manifested".	Various ways depending on the resource	
21						
22	<i>Describing Carriers</i>					
23	media type	RDA VES: Media Type	not applicable	In MARC bib, record the source of VES in 337 \$2	337 \$a \$b	
24	carrier type	RDA VES: Carrier Type	not applicable	In MARC bib, record the source of VES in 338 \$2	338 \$a \$b	
25	extent of manifestation	RDA VES: Carrier Type or RDA VES: Carrier Extent Unit	not applicable	In MARC bib, record as part of this string encoding scheme: Extent of manifestation : illustrative content ; dimensions	300 \$a	
26	colour content	not applicable	not applicable		300 \$b	

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This is a glimpse of the application profile that we enhanced with MARC 21 mapping instructions in column I.

Contenido LRM & RDA

Tema semanal	Objetivos de la instructora
(Semana 11) Sesión MARC 21 2: Codificación y Aplicación	• Demostrar cómo aplicar el perfil de aplicación de nuestro curso, que incluye recomendaciones de los instructores para mapeos MARC 21 • Proveer tiempo de clase para que las estudiantes practiquen aplicar datos RDA a MARC 21, utilizando una plantilla de documento en blanco

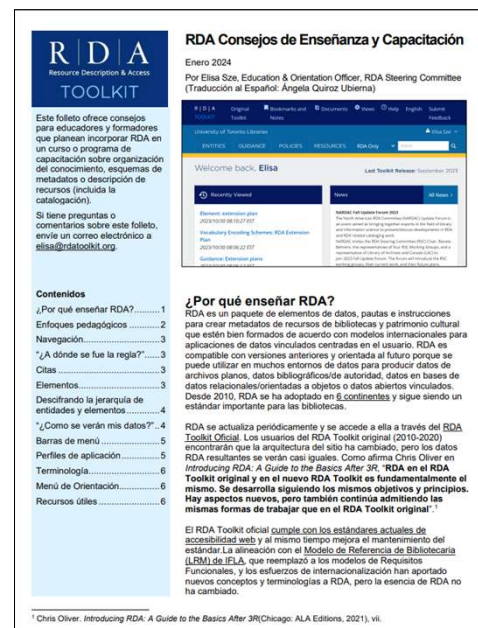
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In this last week of MARC 21, we demonstrate how to apply our course application profile, including recommendations for MARC 21 mappings.

We provide class time for students to practice applying RDA data to MARC 21 using a blank document template.

Recursos para educadores

- [Recursos para educadores](#)
- [Consejos de Enseñanza y Capacitación en inglés](#)
 - [Consejos de Enseñanza y Capacitación en español](#) ¡Gracias a Ángela Quiroz Ubierna por la traducción!
- [Plantillas de diapositivas de enseñanza RDA en inglés](#)
 - [Esquema](#)
 - *Gracias al Grupo RDA México por ofrecerse a comenzar la traducción al español de las plantillas de diapositivas.*



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That concludes my summary of the RDA Toolkit content used in my course.

[Resources for educators](#)

[Teaching & training tips](#) in English

[Consejos de Enseñanza y Capacitación](#) in Spanish -- *Thank you to Ángela Quiroz Ubierna for the translation!*

[Template RDA teaching slides](#) in English

[Outline](#)

Thank you to the RDA Mexico Group for volunteering to begin the Spanish translation of the template slides.

Recursos generales RDA

- [*Introducing RDA: A Guide to the Basics After 3R*](#), de Chris Oliver (Chicago: ALA Editions, 2020)
- [Canal de YouTube de RDA Toolkit](#)
- [Presentaciones de RDA Steering Committee \(RSC\)](#)
- [RDA-L](#) en ALA Connect
- [Representantes regionales y WCEO RDA](#)
- Directora de Educación y Orientación RDA

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Other helpful resources that educators should explore are:

- Chris Oliver's excellent book, *Introducing RDA: A Guide to the Basics After 3R*
- RDA Toolkit Youtube channel
- RDA Steering Committee Presentations page
- RDA-L list hosted by ALA Connect
- Other RDA regional representatives
- And of course, I am always happy to chat with educators and trainers to share information on what has worked well when teaching.

Conclusión

- El RDA Steering Committee recibe retroalimentación sobre cómo apoyar a educadores y capacitadores.
- Si tienen preguntas o comentarios sobre la educación y orientación en RDA, por favor contacten a Elisa Sze en elisa@rdatoolkit.org o elisa.sze@utoronto.ca
- ¡Gracias por su atención y buena suerte con su planeación!

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The RDA Steering Committee welcomes feedback on how to support educators and trainers.

If you have questions or comments about RDA education and orientation, please contact Elisa Sze at elisa@rdatoolkit.org or elisa.sze@utoronto.ca. It can be a lot of fun designing activities that engage students as they learn to catalogue, and my observation has been that the foundations of RDA can be learned successfully in a classroom setting.

Thank you for your attention, and good luck with your planning!