

Implementing Official RDA

The experience of the National Library of New Zealand

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Received: 2025.10.16.

Accepted: 2025.10.16.

Published: 2025.11.18.

Cite as: Preston, T., McGuire, A. (2025)
Implementing Official RDA: The experience of the National Library of New Zealand, *Central European Library and Information Science Review (CELISR)*, 2(4), p. 458–462.

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 AACR2³ 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.

"We aimed to have a Policy Statement at every option, and wherever else we think our cataloguers need to know what to do."

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

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 description⁴ 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.

"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."

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 Academy⁵ 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.

"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."

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.)

Current trends in library and information science in the light of PhD research and studies – 5.

Interview with Andor Nagy

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Received: 2025.06.02.
 Accepted: 2025.06.02.
 Published: 2025.11.12.

The editorial team of CELISR conducted a short interview with recent graduates of the Library and Information Science doctoral program at the ELTE Doctoral School of Literary Studies, in order to provide the journal's readers with an insight into the current and future scientific activities of researchers, and to give an idea of the current research trends in the field. The following article contains a brief overview of the PhD research conducted by Andor Nagy, head of department at the Béla Hamvas Pest County Library, and university assistant professor at the University of Pécs, with background and future prospects.

cultural heritage, libraries, sustainable preservation, research, Hungary, PhD program

Nagy, A. (2025) *Sustainable Preservation of Cultural Heritage*
<https://doi.org/10.15476/ELTE.2024.129>

Supervisor: János Fodor

Please say a few words about your professional life, your inspirations.



Photo: Marianna Tóth-Soltész

In the first seven years of my career, I have worked as a researcher at the Research and Analysis Department of the National Széchényi Library's Hungarian Library Institute. I am about to begin my eighth academic year as a lecturer at the Department of Library and Information Science at the University of Pécs, Faculty of Humanities. At the university, I primarily teach library reference services and information technology-related subjects. In addition, I work full-time at the Béla Hamvas Pest County Library, as the head of the Methodology and Network De-

Cite as: Nagy, A. (2025) Current trends in library and information science in the light of PhD research and studies – 5. Interview with Andor Nagy, Central European Library and Information Science Review (CELISR), 2(4), p. 463–466.

partment. My department is responsible for coordinating library services in the county, as well as local history projects and digitization activities.

Please give a comprehensive summary of the research on which your PhD studies are based.

Individual and communal identity is shaped by the collective influence of culture, language, traditions, the arts, and scientific achievements. The knowledge and experience of previous generations form the cultural heritage of subsequent ones, without which it would be difficult to understand past events, learn from mistakes, and draw lessons that serve as driving forces for ongoing intellectual and cultural development. The protection of cultural heritage is not a common topic of everyday conversation, although we practice our traditions and customs in our daily lives.

Humanity's cultural heritage is extraordinarily rich and diverse, and it is precisely this diversity that makes it valuable but also highly vulnerable. While I was working on my dissertation, a war was raging in Ukraine, right next door, during which – in addition to the loss of human lives – a portion of cultural heritage was also permanently destroyed. Although armed conflicts that threaten cultural heritage may seem like isolated, rare occurrences at first glance, in reality, both warfare and other types of disasters regularly occur worldwide, year after year.

When examining history from the perspective of centuries or millennia, we see that we are left with fewer and fewer sources that can testify to the past. In the event of a fire, a natural disaster, or a war, cultural artefacts that were previously carefully preserved can vanish in an instant, as events threatening cultural heritage have regularly occurred since ancient times. One of the great achievements of our society is digitalization, which has resulted in the creation of digital data sets and documents that future generations will regard as historical records and as a part of humanity's cultural heritage; just as we view an 18th-century pamphlet. However today, born-digital documents, which are created digitally, can only become part of cultural heritage if they remain accessible in the long term, yet there is currently no comprehensive and reliable technology or methodology to ensure this. While the lack or shortcomings of archival methods and procedures will primarily disadvantage future generations, it is our generation's responsibility to develop reliable solutions for the long-term preservation of digitally created documents.

My dissertation was primarily motivated by the above realizations, but my choice of topic was not without precedent. At the very beginning of my career, as an undergraduate student of information science and librarianship, I was already concerned with the fate of digitally created documents. In my bachelor's thesis, which focused on the reliability of digital rights management technologies for e-books, I highlighted one of the main factors that make digital documents extremely vulnerable: too much digital data and too many digital documents, as well as the copyrights associated with their use, have come under the control of technological giants.

Who are the primary "beneficiaries" of your research – librarians, users, policy makers?

The primary beneficiaries of my research are professionals in the field, as I address a problem that can only be effectively solved if it receives adequate attention

within the professional community. In addition to broad professional engagement, it is also essential to raise awareness among decision-makers. Meaningful progress and tangible results can only be achieved through cooperation, a shared understanding of the problem, and the development of solutions grounded in professional expertise.

Please summarize the main conclusion(s) of your thesis.

The slow erosion of cultural heritage is often triggered by natural disasters, human negligence, wartime events, and ideologically motivated destruction, which catch the professionals responsible for protection off guard. Since such events are often perceived as isolated incidents, their impact is frequently underestimated. However, from a historical perspective, it is clear that cultural heritage is continuously at risk. Two fundamental prerequisites for ensuring the survival of memories tied to different eras are the preparedness of professionals, and an effective institutional framework.

My research highlights that many institutions are not adequately prepared to handle emergencies, which could lead to the partial loss of cultural heritage. Although the other fundamental condition for the sustainability of cultural heritage – an effective institutional and organizational framework – is of satisfactory quality in Hungary, preparedness for emergency management remains insufficient.

In my dissertation, the analysis of organizations related to heritage preservation plays a prominent role, with particular attention to the activities of IFLA and UNESCO. These organizations not only support the preservation of cultural heritage, but also offer opportunities for professional collaboration. I examine the two fundamental conditions for the sustainability of cultural heritage – emergency management capabilities and an effective institutional framework – in close connection, as deficiencies in one can impact the effectiveness of the other.

The identification of heritage elements, which is essential for the preservation of cultural heritage, can vary across different periods and societies. Therefore, it is particularly important to understand how value judgments of certain objects change or may change over time. For example, the Stalin's Boots monument in Budapest's Memento Park not only serves as a reminder of a bygone era but also symbolizes the desire for freedom. Libraries' adaptability, manifested in their innovative responses to changing circumstances and their connection to global professional networks, ensures that these institutions can maintain their societal relevance in the long term. However, the digital transition and the preservation of personal digital legacies present new challenges, for which libraries have yet to develop comprehensive solutions.

Despite the fact that in Hungary, the two fundamental conditions for the sustainability of cultural heritage – an effective institutional framework and adaptability – are of satisfactory quality, the capability to manage emergencies and the comprehensive identification and preservation of cultural heritage remain unresolved issues.

Please explain why and how you chose Institute of Library and Information Science at Eötvös Loránd University.

The institute is one of the most important strongholds of library and information science in Hungary, as it educates the majority of the country's librarians and also offers doctoral training in the field. Since many leading experts are affiliated with

the institution, it provides an opportunity to learn from them, build professional relationships, and collaboratively advance the discipline in Hungary.

What has Eötvös Loránd University given you – professionally, personally, communally?

ELTE provided a solid academic foundation for my PhD studies and enabled me to explore complex issues related to the sustainability of cultural heritage. Through seminars, consultations, and academic events, I had the opportunity to work with renowned scholars and build meaningful professional relationships. The university's intellectual and collegial atmosphere fostered dialogue, critical thinking, and long-term collaboration. These experiences greatly contributed to my professional growth, personal development, and sense of belonging to the academic community.

Please say a few words about your future research plans.

In the future, I intend to focus on current issues in library and information science, especially those that have practical relevance for institutions and professionals. My goal is to produce research that supports the everyday work of libraries and contributes to improving services, workflows, and preservation strategies. I am particularly interested in challenges related to digital transformation and the sustainable management of information. I aim to generate results that can be directly applied in professional practice and policy-making.

