

TRANSITIONING TO RDA: THE PHILIPPINE EXPERIENCE

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Abstract

This study describes the extent of implementation of RDA in the Philippines and determines the common problems encountered by libraries as they transition from AACR2 to RDA (Resource Description and Access). It also assesses the effectiveness of the training programs offered by the Philippine Association of Academic/Research Librarians, Inc., (PAARL) as well as the usefulness of the Cataloging Policy Statements and RDA Guidelines for Philippine Libraries that was prepared and disseminated by PAARL. The respondents of this study include those who received the initial RDA training (Training of Trainers) in 2014 and those who attended RDA trainings sponsored by PAARL. In addition, all active members of PAARL are included as part of the survey since they are the ones most likely to be the recipients of the trainings cascaded down by those who attended the Training of Trainers. Results show that a significant number of libraries have now implemented the use of RDA in their respective libraries, most of whom received their training from PAARL. The most common problems encountered by those that implemented RDA include lack of consistency in the library catalogs, data quality control and compatibility with MARC records, and user familiarity. On the other hand, some libraries are unable to implement RDA because of the high cost of subscription to the RDA toolkit. According to the respondents, the trainings provided by PAARL and the Cataloging Policy Statements and RDA Guidelines for Philippine Libraries are effective and useful.

Keywords: Resource Description and Access (RDA), cataloging standard, training, Philippine libraries, Philippine Association of Academic/Research Librarians, Inc., (PAARL)

Introduction

RDA (Resource Description and Access) is an international cataloging code that replaced AACR2 (Anglo-American Cataloging Rules, 2nd edition) (Bianchini & Guerrini, 2009) and was developed by the Joint Steering Committee for Development of RDA (Kuhagen, 2011). It is a standard that is designed for the digital world, thus provides for a

“comprehensive set of guidelines and instructions on resource description and access covering all types of contents and media.” Scope and organization are the main difference between AACR2 and RDA which can be summarized into two: that “information should be recorded as found” and that terminologies be made understandable to all and not just to library people (Anhalt & Stewart, 2012).

Transitioning from AACR to RDA is not an easy task. In fact, even the Library of Congress which was one of the forerunners of RDA, did encounter a number of challenges along the way in their process of implementing RDA (Morris & Wiggins, 2016).

In the Philippines, it was the late Atty. Antonio M. Santos, then Director of the National Library of the Philippines (NLP), who introduced RDA through the holding of a salon on the topic “What Now for RDA in the Philippines?”. This event was held on July 23, 2012 at the Conference Room of the NLP. Invited participants composed of cataloging experts from selected academic libraries in Metro Manila. This paved the way to the establishment of the National Committee on Resource Description and Access (NCRDA) in the same year. The Committee was chaired by Mr. Ruben P. Marasigan, a faculty member of the Philippine Normal University. Hon. Corazon Nera from the Lyceum of the Philippines University and Mr. Rodolfo Tarlit, from the University of the Philippines served as Co-Chairs. Representatives from the following libraries constituted the members: Ateneo De Manila University Library, De La Salle University Library, University of Santo Tomas Library, Adamson University Library, Far Eastern University Library, and the De La Salle University-Dasmariñas Library, while the NLP served as the Secretariat. Said committee was tasked to come up with plans on the nationwide adoption of RDA. PAARL, on the other hand, spearheaded the implementation of the plans while funding was sought from the National Commission for Culture and the Arts (NCCA)-National Committee on Library and Information Services (NCLIS). Thus, the implementation of RDA in the Philippines can be regarded as a national and a collaborative effort.

The first RDA training-workshop organized by PAARL was held in August 2012 in Manila. In October of the same year, said training-workshop was replicated in Butuan City with the Caraga Librarians and Libraries Association, Inc. as organizer. This was a brave and bold move for the two library associations considering that although the invited trainers were expert catalogers, they themselves were still grappling with RDA at that time.

The feedback gathered from the attendees and the trainers themselves on the difficulty of interpreting the new cataloging standard, brought the organizers and the NCRDA to rethink about carrying on with the trainings in other regions of the country. To ensure the efficient transfer of skills, the NCRDA thought of conducting a training of trainers and invited no less than Barbara Tillett, Chief of the Cataloging Policy and Support Office of the Library of Congress in Washington, D.C., to fly to Manila to serve as trainer. The training of trainers jump-started in April 2013. Select catalogers, metadata specialists and head librarians coming from all over the country were invited to attend the training for free.

Six members of the NCRDA who are nationally-recognized cataloging experts and who likewise attended the training facilitated by Ms. Tillett were tasked to conduct a series of training-workshops held at different provinces in the country’s three major islands—Luzon, Visayas, and Mindanao. One session in each of the three islands was held. The session for Luzon was held in Cavite (May 2013); the one for the Visayas was conducted in Cebu City (June 2013); while Davao City (April 2013) was the venue for Mindanao. All these sessions were partly subsidized by the National Commission for Culture and the Arts (NCCA), hence were provided to the librarians at a minimal training cost.

Aside from the nationally-recognized cataloging experts, other attendees of the training of trainers were also directed to cascade the training to their respective localities to ensure extensive implementation of RDA in the country. To ensure that the recipients of the training of trainers will abide by the directive, they were asked to sign a formal agreement.

After the training of trainers, the holding RDA training-workshops sponsored by other organizations and institutions soon followed. In May 2013, the DOST Science and Technology Information Network of the Philippines (DOST ScINET-Phil) organized an exclusive training-workshop for all its network libraries. The Philippine Normal University Library and Information Science Alumni Association

(PNULISAA), Inc. also offered a similar training–workshop in October 2013, which was likewise held in Manila. An exclusive RDA training was also conducted for the librarians of Adamson University in the latter part of October 2013. La Salle University in Ozamiz City also carried out an RDA training workshop for librarians based in Mindanao in August 2014. For those teaching cataloging, trainings were organized by the School of Library and Information Studies of the University of the Philippines (Santos, 2016).

As a follow-up to the series of trainings conducted in the three major islands of the country, public consultations were likewise organized by PAARL, aimed at identifying problems encountered by librarians all over the country, in the adoption of the new cataloging standard. The public consultations were coupled with RDA training–workshops. These public consultations and training–workshops were held in Bacolod (for the Visayas leg) in May 2014, Baguio (for Luzon) in June 2014, and General Santos City (for the Mindanao leg) in August 2014.

Results of the public consultations prompted PAARL to come up with the Cataloging Policy Statements and RDA Guidelines for Philippine Libraries. This work is a concise manual containing basic RDA rules (complete with examples), which Filipino librarians can refer to in the absence of the RDA toolkit. It was prepared in partnership with members of the NCRDA and was meant to serve as a “substitute” to the toolkit as there were issues regarding the affordability of the toolkit that surfaced during the public consultations.

As it has been four years after the project was completed, PAARL deems it necessary to ascertain the impact of the training programs on the implementation of RDA in Philippine libraries and how it has helped build the capacity of Filipino catalogers/librarians on the use of the said cataloging standard. In addition, the Association also needs to find out the usefulness of the Cataloging Policy Statements and RDA Guidelines for Philippine Libraries, which it prepared and released in 2014.

This study looked into the extent of implementation of RDA in the country and likewise determined the common problems encountered by libraries in the Philippines as they transitioned from AACR2 to RDA. Also, it assessed the usefulness of the training programs offered by PAARL and the Cataloging Policy Statements and RDA Guidelines for Philippine Libraries that was prepared and disseminated by said Association. Specifically, it addressed the following questions:

1. To what extent has RDA been implemented in the country?
2. What were the common problems/issues encountered by Philippine libraries concerning the implementation of RDA?
3. How did Filipino catalogers and metadata professionals prepare for the implementation of RDA?
4. Were catalogers and metadata professionals able to attend RDA training programs, specifically those offered by PAARL?
5. How useful were the RDA trainings provided by PAARL?
6. How useful was the Cataloging Policy Statements and RDA Guidelines for Philippine Libraries prepared and disseminated by PAARL to Filipino catalogers and metadata professionals?

The results of this study will be useful, specifically for PAARL, in planning for future directions (i.e. offering additional trainings or preparing learning modules, as necessary; planning for other activities, etc.), as far as the nationwide adoption of RDA is concerned.

Literature Review

The text of the new standard (RDA) was published in 2009 and was tested by three national libraries (the Library of Congress, the National Agriculture Library, and the National Library of Medicine) in the United States in 2010 (Kuhagen, 2011; Yosaka & Park, 2013). In 2013, the Library of Congress proceeded with the full implementation of RDA (Park & Tosaka, 2015). Libraries around the world soon followed. The journey of these libraries in

transitioning from AACR2 to RDA offered insights on the most common and likewise unique issues encountered by libraries across countries.

In Iran, for example, its National Library ascertained how existing bibliographic records can be integrated into RDA by examining how well the records coordinate with the said standard. Eighty-eight percent (88%) of the records examined showed to be conforming well with RDA (Pazooki et al., 2014).

In Turkey, only 10 libraries have implemented RDA and they confirmed having experienced difficulties in the transition process. Other concerns which likewise surfaced were the failure to implement RDA on the national level; lack of local best practices to benchmark on; interoperability issues among of libraries; inadequacies of library systems; language problems; and, the lack of national policies (Çakmak, 2018).

In Israel, academic libraries have gathered together in preparation for the adoption of RDA—a move that they consider inevitable as they have since been following the American standard. Concerns regarding the new rule on material designation arose as they anticipate difficulty in identifying media type with the pre-RDA records (Goldsmith & Adler, 2014).

Kent State University Libraries (KSUL) in Ohio, being an early adopter of RDA, faced a number challenges. Lack of administrative support, training and documentation issues, the formulation of procedures fit for local consumption, were only some of the problems encountered in the process of implementing the new standard. Working together to educate themselves and each other made them focused not only by understanding the “how” of RDA but also the “why.” With the staff’s positive attitude towards RDA, they were able to manage the challenges and successfully converted their cataloging processes following RDA (Maurer & Panchyshyn, 2014).

The implementation of RDA in Canada highlighted the differences between the English and French Canada experiences. The English Canada training was not centralized. Trainings were either organized by some ad hoc groups while others train on their

own making do with resources made available on the Net. In French Canada, however, trainings were organized by French-speaking cataloging community and were delivered in French. There is very little peer involvement, though. Nevertheless, both communities agreed that there is a need to develop the capabilities of stakeholders to allow them to produce online training materials (Cross et al., 2014).

China, on the other hand, is working on the localization of RDA but is progressing slowly. Training, however, is being carried out gradually. While Chinese librarians do not detest the adoption of RDA, slight differences in their attitudes were noted. Language issue, especially for non-English speakers, emerged to be the major concern (Luo et al., 2014).

In the Republic of Korea, Do, Oh, and Lee (2015) compared RDA to both Anglo-American Cataloguing Rules 2nd edition (AACR2) and the Machine Readable Cataloguing (MARC) data formats. Results validated the usability of RDA in terms of five usability metrics such as search usefulness, search efficiency, general search satisfaction, satisfaction for search functionalities, and system convenience. In addition, it was found out that the significant difference between the systems was the satisfaction on the suitability of the search categories.

The issue of learning both RDA and AACR2 was examined by Lisius (2015) probing whether there really is a need to continue learning both, or if learning RDA alone will suffice for the catalogers of the future. The study concluded that, while the need to learn both codes may decline in the future, learning these alongside with one another, at present, remain important.

In the Philippines, initial attempts to find out the status of the implementation of RDA have been carried out as early as 2012. Obille (2012), for example looked into the efforts of different stakeholders such as library organizations, library schools and selected libraries in the country on implementing RDA. The readiness of librarians

based in Mindanao, on the other hand, was ascertained by Acedera (2014). Results of the study showed that librarians who underwent training on RDA were confident that they would be able to implement RDA in their respective libraries. However, the high cost of the RDA toolkit presented to be a problem. Another study conducted by Santos (2016) investigated on the implementation status of RDA in the country and found out that librarians based in Metro Manila and nearby cities/provinces showed significant progress as far as the implementation of the new cataloging standard is concerned. Those in the Visayas and Mindanao, though, showed to lag behind.

This study provides insights on the similarities and differences of the Philippine libraries' experiences with those of other libraries in other countries in their course of transitioning to RDA.

Method

Quantitative descriptive research was employed through the conduct of an online survey. The survey instrument was adapted from the questionnaires of Cullen (2016) and Park and Tosaka (2015), which looked into the issues of the implementation of RDA in Ireland and the United States, respectively. It consisted of four sections—1) about your library; 2) implementation status; 3) transition/implementation issues; and 4) training; and takes about 10 minutes to complete.

As the questionnaire was tailored to Filipino catalogers, pilot testing was carried out with the help of catalogers from one big academic library based in Manila. As results of the study will be used by PAARL, members of the 2018 Board were also requested to review the questionnaire. Comments and suggestions gathered from these two groups served as bases for revisions. Items that turned out to be ambiguous and/or highly technical were either revised, simplified or totally deleted.

The respondents consisted of those who received the initial RDA training (Training of Trainers) in 2014 and those who attended RDA trainings sponsored by PAARL. In addition, all active members of PAARL were also included as part of

the survey since they are the ones most likely to be the recipients of the trainings cascaded down by those who attended the training of trainers.

The survey was sent to a total of 526 email addresses provided by the secretary and the Chair of the Membership Committee of the 2018 PAARL Board. It was conducted for a period of one month, that is, from July 9 to August 9, 2018.

The total number of responses collected was 72; the majority (88.90%) were from academic libraries while the rest were either from the National Library of the Philippines, public, school and special libraries. A big number (59.70%) were from the NCR and CALABARZON (Region 4) (13.90%). Although there were very few (some, just one) representations from other regions, all were represented.

RESULTS

Status of RDA Implementation/Adoption

Majority (76.40%) of those who were surveyed have already implemented the use of RDA in their respective libraries, where a significant number are based in the National Capital Region (NCR) (see Table 1). This is most likely because a great number of respondents also came from the NCR. However, respondents from 10 other regions of the country (mostly in Mindanao and the Visayas) have likewise started with the implementation of RDA, but the number showed to be very limited.

Implementation period peaked in 2014 to 2015 although some have started earlier, that is, just immediately after the Library of Congress began its full implementation in 2013. Adherence to international standards and the capability of the current integrated library systems (ILS) were the primary reasons why the respondents decided to adopt RDA. Most (70.58%) of those who have not implemented yet the use of RDA, though, plan to carry on with its implementation.

The cost of subscription to the RDA toolkit was the primary reason why some libraries were unable to implement RDA. Moreover, they are still waiting for

Table 1
Extent of Implementation

Region	No. of Respondents	%
National Capital Region (NCR)	32	58.18
CALABARZON (Region IV-A)	8	14.55
Central Visayas (Region VII)	4	7.27
Bicol Region (Region V)	2	3.64
Cagayan Valley (Region II)	2	3.64
Northern Mindanao (Region X)	2	3.64
Cordillera Administrative Region (CAR) (Region XIV)	1	1.82
Davao Region (Region XI)	1	1.82
Ilocos Region (Region I)	1	1.82
MIMAROPA (Region IV-B)	1	1.82
Socksargen (Region XII)	1	1.82
Grand Total	55	100.00

evidence on how RDA will work for other organizations. As some of the existing library systems being used do not support RDA, some libraries cannot implement RDA even if they wanted to because this will likewise mean replacing their current ILS.

Filipino librarians, in their initial encounter with RDA, think that it can provide transparency to users as it applies the take-what-you see principle and have discontinued the use of Latin words and abbreviations. They also believe that RDA will improve discovery and that it will likewise provide clearer authority records with the addition of new elements. Most (70.00%) of those who have implemented RDA see no significant impact in their local cataloging operations despite the fact that they did encounter problems like lack of consistency in the library catalogs, data quality control and compatibility with MARC records. They also did face problems with user familiarity, in the beginning.

For catalogers, however, RDA means improved discovery experience for library users and well-formed library metadata for the future. The enhancements in data standards and library

technology have, for them, also led to more efficient cataloging.

RDA Trainings

Most (84.70%) of the respondents have attended RDA trainings and majority (80.00%) of them received their training from PAARL. Consequently, 90.00% of those who attended the PAARL trainings were able to successfully implement RDA in their respective libraries.

The RDA trainings, in general (i.e., those given by PAARL and those by other associations and institutions) showed to be very useful to the respondents (57.40% considered the trainings useful to a great extent and 24.60% said it is much useful). PAARL trainings in particular were considered by the respondents to be very useful garnering a mean average of 4.18.

Trainings for librarians and copy catalogers in the respective institutions of the respondents usually lasted from 1 to 4 days. The length of time allotted for the training was regarded by 56.70% of the surveyed librarians to be just right; that is, exactly as how they planned it to be. Some (21.70%) spent

more time than they planned for, while others (21.70%) devoted less amount of time than what they originally intended to. Trainings were usually conducted by either nationally recognized experts (27.30%); in-house trainers (25.80%); or original catalogers (22.70%). As expected, 63.30% encountered problems in the course of the training. The unavailability of RDA toolkit (51.1%) and the lack of expertise appeared (48.90%) to be the most common problems. Resistance to change was likewise encountered by 46.80% of the respondents.

Those who were trained find the in-person trainings/workshops sponsored by library associations to be the most effective means of learning RDA. Peer learning (learn-as-you-go approach and hands-on practices) and in-house local training opportunities also proved to be effective. This implies that both formal and informal trainings are useful and valuable.

Less than half (45.70%) of the respondents confirmed that they or their superior or staff have provided trainings/workshops on RDA, majority of whom were only able to provide one training/workshop.

The Cataloging Policy Statements and RDA Guidelines for Philippine Libraries was prepared by PAARL specifically for those who cannot afford to buy the printed RDA toolkit or subscribe to its online version. As such, it contains simplified versions of the basic rules contained in the toolkit which should be able to provide instructions on how to do descriptive cataloging of common library materials (books, theses, and audiovisual resources) using RDA. Results of the survey showed that there is wide dissemination, having been received by 78.30% of the respondents. Its usefulness, however, was rated 3.8 (mean average) meaning they were able to use it but not to the extent to which it was originally meant to be, that is, a condensed and simplified version of the toolkit.

Most of the respondents (77.80%) expressed the need for PAARL to conduct more training-workshops on RDA, which they further re-affirmed

when asked about their thoughts and other comments. Likewise, they would want the following materials to be made available to them: training modules (70.80%); online tutorials (65.30%); and, a condensed manual highlighting the significant changes between AACR2 and RDA.

DISCUSSION

A number of issues and concerns arising from the implementation of RDA proved to be universal.

Cost, particularly the affordability of trainings (Cross et al., 2014; Park & Tosaka, 2015), was an issue experienced by even first world countries like Canada and the United States. Foreseeing that this would be a major concern for Filipino librarians, PAARL provided free and subsidized training-workshops. Despite this, cost persisted to be an issue as most of the libraries that have not adopted RDA are unable to afford the subscription to the RDA toolkit or even its printed version. Budget posed to be a problem for both first and third world countries.

Technical issues particularly compatibility of the current ILS to RDA (Çakmak, 2018; Luo et al., 2014) was a problem experienced by Turkey, China and the Philippines. Such problem may only be solved by upgrading the system (if it is in-house developed) or by totally replacing the system. Both of which will again lead to additional cost.

Librarian's attitudinal problems, specifically resistance to change or the attitude of doubt (Luo et al., 2014) demonstrated to be common between China and the Philippines. Adopting RDA means adopting to change; and change brings about ambiguity or the feeling of uncertainty which, in this case, is most likely brought about by the need to relearn (Nakhoda & Tajik, 2017) or retool oneself to be able to understand and use the new cataloging standard.

The lack of expertise (Luo et al., 2014) is a problem that the Philippines and China experienced as they transitioned to RDA. Since RDA was a project initiated in the US through the collaborative effort of the Library of Congress and two other national libraries such as the National Agricultural Library

and National Library of Medicine, experts would likewise be coming from these group of librarians. As such, less is expected of librarians from Asia (being very far away from the US) to be able to readily possess the needed competencies/expertise that would enable these countries to move swiftly forward with the adoption of RDA. The initiative of PAARL to bring to the Philippines Barbara Tillett, the Chief of the Cataloging Policy and Support Office of the Library of Congress, is indeed an impressive move in ensuring that the country is able to develop experts the soonest possible time.

Since the problems that surfaced in the course of transitioning to RDA are common, practices, resolutions, preferences and beliefs also appeared to be common between nations. For Israel, China, and the Philippines cooperation is key (Goldsmith & Adler, 2014; Luo et al., 2014) to the successful implementation of RDA. The coming together of academic libraries in Israel, the library community in China, and the partnership of a library association with the government in the Philippines have indeed facilitated the process of transitioning to RDA of these countries. Similarities were likewise noted on how catalogers from Canada see RDA as a way towards a more efficient cataloging process (Goldsmith & Adler, 2014) in the same way that Filipino catalogers do. Formal (face-to-face/personal) trainings surfaced to be the most preferred mode of training based on the critical review conducted by Yosaka and Park (2013), and the Filipino librarians are no different from librarians all over the world. The same with the Philippines, librarians in the US regard informal training (“learn-as-you-go” peer learning) as the most efficient way of acquiring skills on the use of RDA (Park & Tosaka, 2015). The use of online training resources (Sanner, 2012; Yosaka & Park, 2013), though, appears to offer great opportunity for librarians who would want to undergo training in the future or for those who would want to review or take up refresher courses.

The experience of the Philippines in the implementation/adoption of RDA is no different from the experiences of other nations. Countries that

are therefore still in the stage of planning for the adoption of RDA are urged to look into the common problems encountered by those who went ahead and how they were able to address the problem so they would be able to avoid the same mistakes and transition smoothly and swiftly.

Conclusion and Recommendations for Future Research

In terms of implementing RDA, the Philippines is now in the midway. This, for PAARL, means that it still has to get in touch with the remaining half of the country specifically those in the Mindanao and selected provinces in the Visayas and a few more provinces in Luzon.

The training-workshops conducted by PAARL proved to be successful as far as the NCR is concerned. Although the association exerted effort on providing identical training-workshops (i.e., in terms of content and number of sessions (one session per major island)) to librarians in the Visayas and Mindanao, it demonstrated to be very limited. Furthermore, it seemed to have failed to attract attendees who have the potential of becoming trainers themselves, who could have provided follow-up trainings, as necessary. Considering that distance and training cost are expected to pose a problem in these areas, this should have been tagged as a priority for PAARL.

The respondents also do not see the Cataloging Policy Statements and RDA Guidelines for Philippine Libraries as a tool which they could use in the absence of the RDA toolkit hence has remained to believe that they cannot implement RDA without the toolkit. This, therefore, goes to show that while the guidelines were widely distributed, its use was not maximized to the fullest.

Due to the limited number of respondents from the Visayas and Mindanao who agreed to participate in this survey, a follow-up study covering the widest area possible is recommended preferably after the conduct of the additional face-to-face training-workshops and the online tutorials are made available. This will enable PAARL to more accurately ascertain the degree to which they have covered the

country in terms of training and how such would impact the implementation of RDA in the country.

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