Official RDA Toolkit implementation
a report on progress

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ABSTRACT

This article outlines the British Library's progress in implementing the Official RDA Toolkit. It describes the key activities and challenges encountered during preparation and implementation as well as next steps.

Background

In June 2025 the British Library began to roll out its implementation of the Official RDA Toolkit to cataloguing staff. This followed a five-year process of developing policy documentation both within and outside the Toolkit to facilitate its use. The British Library's business plan for adopting the Official RDA Toolkit was founded on its potential for addressing some of the strategic challenges it faces as an organisation in managing collection metadata. These challenges have been set out in successive Collection Metadata strategies: *Unlocking the value* (British Library, 2015) , *Foundations for the future* (British Library, 2019), and the most recent, *Sustainability through change* (British Library, 2023), which is taking the British Library from 2023 through until 2030. The scope of and schedule for implementation has been influenced by external factors, available technical infrastructure, partner organisations, communities of practice and the planned timeline for decommissioning the Original Toolkit.

When the Official RDA Toolkit was first published in December 2019, it and the IFLA Library Reference Model which underpins it were central to the British Library's proposals for an internal Target Metadata Model that would enable the convergence of collection metadata standards and break down the internal silos which are a barrier to productivity and discovery. These silos include the separate metadata schema used to catalogue published textual content, sound and moving image-based content and archival content. The British Library's migration from Aleph to ALMA as its new Integrated Library System will offer the chance to realise, at least in part, those aspirations which the Target Metadata Model set out. The first stage of implementing

ALMA during 2025 has involved the British Library's migration of metadata for published textual content encoded in the MARC 21 format; a migration of metadata for sound and moving image-based content to ALMA is planned for 2026. Separate system solutions are currently being explored for archival and manuscript metadata. All of these developments follow the ransomware attack in October 2023 which took the majority of British Library legacy systems offline for varying periods of duration.

Challenges

In creating a set of policy documentation which would support its usage of the Official RDA Toolkit, the British Library was presented with a number of challenges. One challenge was the degree of flexibility which RDA now allows for its application. Whereas the Original Toolkit contains around two hundred and fifty optional additions, omissions and alternatives, the Official RDA Toolkit contains over four thousand options and conditional options. The British Library needed to set up a process whereby it could populate the Official RDA Toolkit with local policy statements which corresponded to these options. Due to the scale of this task, the British Library developed a batch process whereby policy statements could be created and edited in an offline spreadsheet, then uploaded to the Official RDA Toolkit's online content management system in large groupings using an XSLT transform rather than individually by manual intervention. It also developed a list of standardised "boilerplate" words and phrases which could be used and reused for the purpose of generating policy statements more efficiently and consistently.
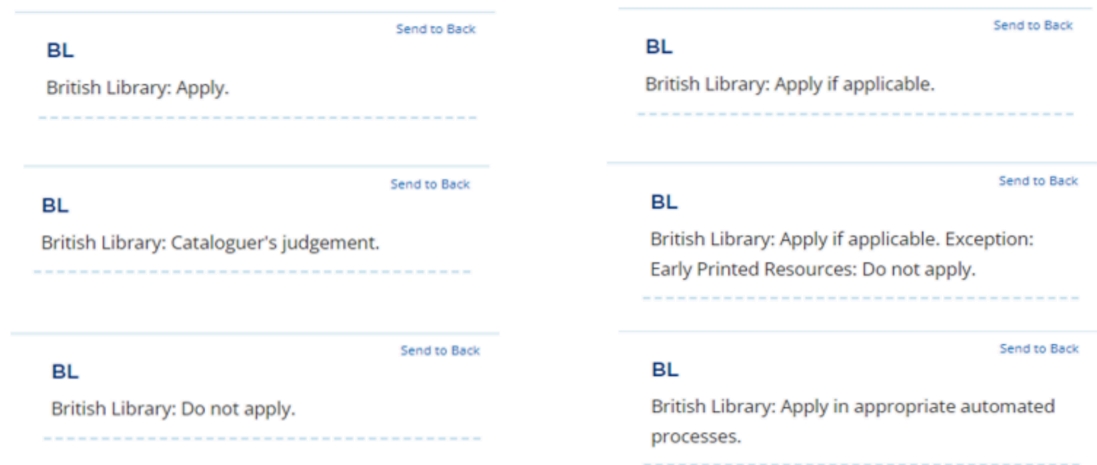

Figure 1: Boilerplate words and phrases used to create policy statements in the Official RDA Toolkit.

Another aspect of the Official RDA Toolkit's flexibility rests on what it requires for the minimum description of a resource entity. This is more limited in scope than the set of core (and core if applicable) elements specified by the Original Toolkit. In addition, the Official RDA Toolkit's structure is different from that of the Original Toolkit. On the one hand, the Original Toolkit is linear in nature, subdivided into numerically sequential chapters and appendices, each of which are further subdivided by pages and section

numbers. On the other hand, documentation in the Official RDA Toolkit is more granular in nature, with a greater reliance on linking functionality to navigate between documents and without numerically sequential ordering. These structural changes and those involving minimum descriptions reflect an optimisation of the Official RDA Toolkit for future facing, linked data and fully relational applications. By contrast, the Original Toolkit's structure and descriptive requirements are based on more traditional flat file or bibliographic and authority cataloguing paradigms. However, the British Library continues to encode its cataloguing metadata using the relatively flat structure of MARC 21. In order to serve its catalogue users as well as maintain its bibliographic products, the British Library also specifies various sets of elements which must be included (and included if applicable) for effective resource description.

As a means of addressing the structural and descriptive challenges set out above, it was necessary for the British Library to build an intermediation layer between its local guidance and the Official RDA Toolkit so that both could be used in tandem. Two spreadsheet-based application profiles were set up to reflect the sequential order of fields and subfields in the MARC 21 bibliographic and authority formats. These application profiles contain various features, including mappings from MARC 21 encoding to their equivalent RDA elements and recording methods. They also list the RDA elements which the British Library requires to be recorded in one or more iterations, depending on the type of bibliographic entity being described. The application profiles are linked to both the MARC 21 format documentation maintained by Library of Congress and the Official RDA Toolkit maintained by ALA Digital Reference. In addition, they are linked to detailed policy documentation created by the British Library and hosted locally on Microsoft SharePoint. The British Library's detailed local policy documentation ranges in granularity, in some cases covering individual elements whilst in others covering whole workflows. Collectively, the application profiles and detailed policy documents have gone on to form the British Library's new Cataloguing Hub.

	Workflow	MARC encoding	Element	Domain	Range	Link to RDA Toolkit	Recording method	First instance	Additional instances
129	MONO	046 $a, $c	Date of publication	manifestation	timespan	rdam:P30011	structured description	Early print only - If applicable	No
130	GEN	082 04 $a	Subject	work	NA	rdaw:P10256	identifier	Contemporary only - Mandatory	No
131	GEN	082 04 $223	Source consulted	work	manifestation	rdaw:P10406	identifier	Contemporary only - Mandatory	No
132	GEN	100 $a, b, c, d, q	Access point for person	person	nomen	rdaa:P50377	structured description	If applicable	No
133	GEN	100 $e	Creator person of work	work	person	rdaw:P10437	structured description	Optional	No
134	GEN	11X $a, b, c, d, n, d	Access point for corporate body	corporate body	nomen	rdaa:P50375	structured description	If applicable	No
135	GEN	11X $e	Creator corporate body of work	work	corporate body	rdaw:P10531	structured description	Optional	No
136	GEN	130 0# $a, f, h, k, l, n, p, s	Access point for expression	expression	nomen	rdae:P20310	structured description	If applicable	No
137	GEN	130 0# $a, k, n, p	Access point for work	work	nomen	rdaw:P10223	structured description	If applicable	No
138	GEN	130 $f	Date of expression	expression	timespan	rdae:P20214	structured description	If applicable	No
139	GEN	130 $h	Content type	expression	NA	rdae:P20001	structured description	If applicable	No
140	GEN	130 $k	Category of expression	expression	NA	rdae:P20331	structured description	If applicable	No
141	GEN	130 $l	Language of expression	expression	NA	rdae:P20006	structured description	If applicable	No
143	GEN	130 $n	Numbering of part	work	NA	rdaw:P10012	structured description	If applicable	No
145	GEN	130 $p	Part of work	work	work	rdaw:P10019	structured description	If applicable	No
149	GEN	240 $a, f, h, k, l, n, p, s	Access point for expression	expression	nomen	rdae:P20310	structured description	If applicable	No
150	GEN	240 $f	Date of expression	expression	timespan	rdae:P20214	structured description	If applicable	No
151	GEN	240 $h	Content type	expression	NA	rdae:P20001	structured description	If applicable	No
152	GEN	240 $k	Category of expression	expression	NA	rdae:P20331	structured description	If applicable	No
153	GEN	240 $l	Language of expression	expression	NA	rdae:P20006	structured description	If applicable	No
155	GEN	240 $n	Numbering of part	work	NA	rdaw:P10012	structured description	If applicable	No
157	GEN	240 $p	Part of work	work	work	rdaw:P10019	structured description	If applicable	No
159	GEN	240 $a, k, n, p	Access point for work	work	nomen	rdaw:P10223	structured description	If applicable	No
160	GEN	245 $a	Title proper	manifestation	nomen	rdam:P30156	unstructured description	Mandatory	No
161	GEN	245 $b	Other title information	manifestation	NA	rdam:P30142	unstructured description	If applicable	No

Figure 2: Excerpt from bibliographic application profile filtered for monograph cataloguing.

Apart from the Official RDA Toolkit's flexibility and structure, a further challenge encountered by the British Library as part of implementation was the introduction of new concepts which had hitherto not been covered or only partially covered by MARC 21. These new concepts include data provenance, diachronic works, manifestation statements and representative expressions. In order to provide the means to encode these concepts within MARC 21 going forward, the British Library recommended to the RDA Board that a MARC/RDA Working Group be set up. This was along the lines of a previous group which existed to implement changes in MARC 21 reflective of the Original Toolkit. A MARC/RDA Working Group was established and incorporated members of the MARC Steering Group, RDA Steering Committee, staff from several vendors in the metadata supply chain and cataloguing specialists. During its time active the MARC/RDA Working Group drafted and presented MARC change proposals to the MARC Advisory Committee. The change proposals resulted in all of the aforementioned concepts being accommodated by new encoding at the field and subfield level in the MARC bibliographic and authority formats. In the case of data provenance, new appendices were established in MARC 21 so that different categories of data provenance could be recorded if the need arose. The British Library's first phase of implementing the Official RDA Toolkit will not include the encoding of new elements covering data provenance, diachronic works, manifestation statements and representative expressions. Any adoption of these elements will follow an initial, largely business as usual approach to cataloguing outputs and consultations with partner organisations in the wider metadata supply chain.

Roll Out

The British Library's roll out of the Official RDA Toolkit to staff was preceded by a period of user acceptance testing for the policy statements, application profiles and detailed policy guidance described in the previous section. In January 2025 a pool of cataloguers representing various workflows was given an in-person orientation of the Official RDA Toolkit and the British Library's accompanying policy documentation. This was followed by the opportunity for questions and answers. Afterwards, there was a period of self paced learning during which the testers were able to access a variety of supporting materials made available through the British Library's instance of Learning Hub. Testers were then given the opportunity to catalogue a range of resources reflecting their individual specialisms, using scanned images and spreadsheet-based record templates. Between March and May, the evidence from completed records, including written and verbal feedback from testers was gathered. This evidence was used to refine local guidance in advance of a general roll out to cataloguing staff. The process of user acceptance testing identified that there was scope for updating guidance documentation and filling in gaps on the one hand. On the other hand, it identified the need for making self-paced learning more interactive in nature and capable of supporting varied learning styles. To address the latter needs, new resources were added to Learning Hub. Slide presentations with text-based notes were supplemented with equivalents using AI generated voice overs; true/false and

multiple-choice quiz games were added to support Official RDA Toolkit and Cataloguing Hub navigation.

The general roll out of Official RDA began in June 2025 and its first phase concluded in September. Although cataloguing staff were the main focus of the first phase, some technical support staff and senior management also took part. In order to manage the process of orientation more effectively following the in-person orientation sessions, the Learning Hub was used to generate weekly reports of progress on self-paced learning. Once participants had viewed and completed the required training and quiz content, they were given access to scanned images of resources and spreadsheet-based record templates. As with user acceptance testing, staff were invited to submit verbal and written feedback in order to further refine British Library training and policy documentation in support of the Official RDA Toolkit. The first phase of rolling out Official RDA to staff has now concluded. It has been paused to allow for the implementation of ALMA to take place. Cataloguing staff who previously used the Original Toolkit as their source of guidance for cataloguing policy are now being directed to use the Official RDA Toolkit and the Cataloguing Hub instead. Work is ongoing in response to issues raised by the first phase of the roll out.

Next Steps

From the beginning of 2026, the British Library will resume rolling out its implementation of the Official RDA Toolkit. Besides addressing those issues referred to in the previous section, work will commence on implementing RDA for the British Library's Sound Archive. This will accompany the Sound Archive migration of its metadata from the local SAMIMARC encoding format to MARC 21 and from the SymphonyWeb cataloguing system to ALMA. More generally, the British Library will also investigate how ALMA functionality may be used to enhance and rationalise its future metadata outputs with attributes and relationships introduced by the Official RDA Toolkit. This analysis will include an examination of how metadata generated in ALMA may be exposed as linked data in RDA/RDF. In considering such opportunities, the British Library will liaise with stakeholders in the wider metadata supply chain as a means of maintaining interoperability where necessary. As a member of the European RDA Interest Group, the British Library will also offer feedback on proposals made for the further development of the Official RDA Toolkit which may require the ongoing revision of the British Library's own policy documentation. In undertaking all of these activities, the British Library aims to be better placed for the planned decommissioning of the Original Toolkit in May 2027.

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