


# The role of education and training in adopting Official RDA

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## ABSTRACT

As well as providing links to resources for training, this article outlines the centrality of training to implementation and highlights the position of RDA education within the longer history of cataloguing education within the Anglo-American cataloguing tradition.

**KEYWORDS** RDA; AACR2; cataloguing education

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## Introduction

“The decision to adopt any new cataloging code will generate disagreement, controversy, and seemingly endless debate and discussion... We have had our debate, we have had our delay. Now it is time to push forward even though it might seem like leaping into a void” ([Dougherty, 1980](#)).

When R.M. Dougherty wrote his editorial for the July 1980 issue of *Journal of Academic Librarianship*, he was referring to the *Anglo-American Cataloguing Rules, 2nd edition* (AACR2), which had launched two years earlier amid resistance from some institutions. The “dismay, anger, apprehension,” and “resignation” had even led some to call for a boycott due to the anticipated impact on catalogues ([Dougherty, 1980](#)). Decades later, reflecting upon the lessons learned from implementing AACR2, Arlene G. Taylor from University of Pittsburgh, Pennsylvania, summed up the matter at heart: “Recognize that change is difficult” ([Taylor, 2012](#), p. 125).

Any information professional tasked with implementing a new standard will understand that successful adoption requires a multi-faceted strategy. That strategy must address training that brings aboard practitioners, and education that prepares future professionals. RDA as found in the RDA Toolkit that launched in December 2020 (subsequently referred to as “Official RDA”) is no exception. Although the transition from RDA as found in the original Toolkit (published from 2010-2017 and referred to as

“Original RDA” in this article) can feel monumental, training resources are available to help organisations and practitioners through the change.

As the current Education and Orientation Officer (EOO) on the RDA Steering Committee (RSC), this article contains my reflections on learning theories that can inform RDA teaching. In this article, “teaching” and “training” are used interchangeably without any intention of conflating different learning contexts. I reflect on my own interactions with Official RDA as a practitioner-educator and provide examples of how I have approached RDA training in a library and information science (LIS) education program and in workplace-oriented training. Lastly, I discuss the EOO role as a resource for educators and trainers.

### Initial teaching and training offerings

Since preparations to launch Official RDA, the RSC has kept training in mind. Whereas the data generated using Official RDA will look nearly the same for institutions that choose to stay within their existing data environments ([Sze, 2024](#)), the architecture of the RDA Toolkit has changed and entity-relationship modelling has been integrated to accommodate linked data applications. To reduce intellectual barriers, RSC collaborated with its publisher to offer early training through the *RDA Lab Series* ([RDA Lab Series Preview with Instructor Kate James, 2020](#)). To reach a wider audience, new videos were continually added to the free RDA Toolkit YouTube channel<sup>3</sup>, including micro-lectures (the “RDA Concepts” playlist), and recordings of complimentary presentations.

In September 2021, RSC took a novel approach to its relationship with library communities by appointing an EOO. At first a co-option to facilitate Official RDA instruction, this role has become permanent since January 2024. The EOO position has infused training perspectives into the ongoing development of Official RDA, established a direct personal contact for educators interested in speaking with someone on RSC about Official RDA, and led to the creation of resources for educators and trainers ([Learning Resources, 2025](#)).

### Theories of adult learning, and their application to RDA training

Case studies in the LIS literature showcase many implementations of standards, but few works have attempted to engage directly with the application of adult learning theories to cataloguing training. An exception is Young ([2012](#)) that examined the Original RDA test in the United States and adult learning theories for RDA training inspiration. Young ([2012](#)) referenced Malcolm Knowles' theory of adults' distinct learning orientation and Etienne Wenger's writings on communities of practice as sources of knowledge.

<sup>3</sup> <https://www.youtube.com/@RDAToolkitVideo>

While the overview provided ideas for workplace training, a drawback is Young's reference to the Myers-Briggs Type Indicator as a predictor for the learning preferences of cataloguers. In the intervening years, scholars have criticised personality typologies and learning styles for lacking empirical evidence while offering simplistic solutions ([Cuevas, 2015](#); [Fallace, 2025](#)). Nonetheless, Young's suggestions around learning environments (e.g., ensuring visible display screens, comfortable classroom spaces, anonymous feedback mechanisms, and buffer time for breaks and reflection) can be applied generally.

In a *BIBFRAME Workshop in Europe* presentation, Sze, Chan and Jemison ([2025](#)) highlighted other theories that inspire their RDA teaching. The new terminologies and organisational structure of Official RDA encouraged them to apply a scaffolded teaching approach, where complex tasks are broken into discrete steps that learners practice, before more context or instructions are added. Various methods for searching and finding guidance, and tips for reading and deciphering Official RDA text, are also demonstrated in real time.

Scaffolded teaching is backed by several adult learning theories. The Dreyfus five-stage model of adult skills acquisition views the progression of learning through these levels: novice, advanced beginner, competence, proficiency, and expertise ([Dreyfus, 2004](#)). The lesson from the Dreyfus model is to find opportunities to break up RDA instruction into smaller pieces of knowledge, introducing each piece as earlier ones are mastered, and building upon familiar contexts. Sze, Chan and Jemison ([2025](#)) also discuss cognitive load theory ([Sweller, Ayres and Kalyuga, 2011](#)), active-learning techniques borrowed from evidence-based teaching that have been shown to improve information retention ([Buskist and Groccia, 2011](#)), and micro-learning ([Herzog, 2024](#)).

While the diverse contexts and histories of each community makes it impractical to assert a universal approach to teaching RDA, cognitive load theory (CLT) offers insight into the memory processes of adult learners irrespective of culture or language ([Sweller, Ayres and Kalyuga, 2011](#)). CLT focuses on knowledge acquisition through the lens of problem solving—an orientation familiar to cataloguing practitioners. Building upon the schema theory, CLT posits that long-term memory holds many schemas (constructs that classify learned problems alongside solutions); knowledge acquisition occurs when an unfolding problem is compared to schemas stored in long-term memory, resulting in the reinforcement or reorganisation of existing schemas, or the generation of new ones ([Sweller, Ayres and Kalyuga, 2011](#), pp. 22–23).

CLT postulates these characteristics of cognition and memory based on empirical research:

- Human memory consists of working memory, used for processing and transferring information, and long-term memory, used for storing knowledge.
- Human cognition has a limited capacity to process new information.
- Working memory can only retain new information for a few seconds.

- Knowledge acquisition occurs only when information processed by working memory transfers to long-term memory, and working memory can call upon schemas to make sense of an unfolding situation ([Sweller, Ayres and Kalyuga, 2011](#)).

The “instructional implications” suggested by Sweller, Ayres and Kalyuga ([2011](#)) can be applied to Official RDA training in concrete ways:

- Limit the amount of new information added to each lesson to avoid cognitive overload. Official RDA contains many new terms and concepts that require plain language explanations, but these can be introduced gradually.
- Provide “constant rehearsal of novel information”, to enable information transfer from working memory to long-term memory. This could take the form of search and navigation activities to accustom learners to methods of information look-up in Official RDA and build recognition of boilerplate texts.
- Avoid unnecessary redundancies to reserve learner's cognitive load for processes not yet mastered.
- Prompt learners to explain their problem-solving process by citing RDA options and navigational paths.
- Reduce “split attention”. Provide a guided demonstration of an *application profile* that collates all the reference sources learners need to begin cataloguing: RDA elements to use, local policies, and practices to continue. The purpose of training with an application profile is to simulate new workflows while reducing noise and cognitive load.
- Present RDA information through multi-modal delivery. Provide auditory signals and cues when explaining information that is presented visually.
- Reduce instructor's guidance gradually as learners' expertise increases.

### **Personal reflections as a practitioner-educator**

The instructional implications of CLT have retrospectively validated my experiences as a cataloguing practitioner-educator. It has described the learning behaviours and outcomes that I have observed as an instructor of a master's level cataloguing course and as a workplace trainer. More importantly, it has influenced how I package training content.

Customising RDA training means not only recognising diverse professional backgrounds and potential language barriers, but also constraints on human attention and working memory. In my experience, audience engagement has been highest during hands-on practice sessions, while fatigue is visible during lecture-based instruction. The nature of Official RDA requires concepts to be defined; to cut through fatigue, my co-instructors and I look for ways to intersperse lecture content with

activities that have learners move around a physical classroom or complete a group task.

As much as possible, I have integrated exercises—even small-scale quizzes—to encourage practice and provide immediate feedback before incorrect schemas set in. While theory and models remain important, discussion of abstract concepts is undertaken only as needed. An example of this approach can be seen from the Ontario Library Association Super Conference Pre-Conference Workshop in January 2026 ([Brenndorfer et al., 2026](#)), where audience members started with immediate application: cycling through “confidence boosters” that have learners interact immediately with transcription and recording methods, Toolkit navigation, and entity and element labels. Finally, learners were shown how to integrate these pieces of knowledge through a sample application profile and participated in a guided demonstration of the cataloguing process using said application profile, the RDA Toolkit, and supplementary documents. Concepts were explained when terms arose. Retention of audience attention was high and continued throughout the solo activity assigned in the last hour of the workshop.

Teaching LIS students differs from training practitioners but the instructional implications of CLT persist. Viewing cataloguing principles as foundational, my assessments of students' RDA understanding prioritise the rationale behind their choices over the data they create. As Taylor observed, cataloguing guidance may cover known scenarios, but standards and instructions change; students who grasp the fundamental principles have greater capacity to adapt to change ([Taylor, 2012](#)).

### **Incremental changes that support to RDA educators and trainers**

My aims as EOO have been to identify and reach out to educators and trainers, to inform RSC of circumstances impacting RDA training across different communities, and to develop supports to help international audiences. By fielding questions about Official RDA, some concrete developments have been realised: the introduction of the “Orientation” view of the RDA Toolkit “Guidance” menu with the September 2023 RDA Toolkit Release, clarification of selected Guidance pages ([Sze, Holden and Iseminger, 2025](#)), and examples contributed through the RSC Examples Working Group.

Outreach events and webinars introducing RDA concepts to audiences in Asia, Europe, North America, and South America, as well as one-on-one conversations with interested educators and trainers in Africa have revealed demand for RDA training, from basic introductions to advanced programming. As a start, the RSC website hosts a “Learning Resources” page (<https://www.rdatoolkit.org/news/rda/learning-resources>) that includes template teaching slides, which educators anywhere can freely adapt, customise, and re-use.

## Conclusion

Official RDA adoption may not be a simple feat, but with a plan in place for iterative training, implementation is possible. Moreover, plans need not be identical across institutions nor remain static. The diverse contexts of each community warrant bespoke training that respects local circumstances, capacities, and changing environments. While this may make planning for RDA training challenging, it also reflects why internationalisation, a core principle of RDA development, will offer more communities an opportunity to benefit from increasing interoperability and data exchange.

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