RDA adoption in a multilingual cataloguing environment: The case of Israel

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Abstract:

The Israeli library reality presents unique challenges to the adoption of a new cataloguing standard. Foremost amongst these is the multilingual work of cataloguing agencies; terminology must be coordinated with worldwide usage in English and Cyrillic and terminology must be created in Hebrew and Arabic. The structure of the Israeli cataloguing world presents a further challenge: since the early 1980s cataloguing policy has been set by a handful of university libraries, with college, public, and school libraries obeying. This semi-voluntary cooperation began to crumble just as RDA adoption got underway.

Another roadblock to full adoption of RDA is the format of the Israeli rules. The new Israeli cataloguing guidelines are inspired by AACR3 rather than RDA; the Israeli cataloguing textbook retains the structure of AACR2 while changing specific actionable rules. Only guidelines relevant for common types of books have been translated and local policies for other material types have yet to be set. There is no system of professional development for cataloguers and no professional organizations coordinate the flow of information to and from decision makers. Without training individual cataloguers have difficulty in applying "cataloguer's judgement"; they do not have a theoretical base upon which to make decisions nor explicit rules to follow.

Israeli cataloguing has an impact far outside its national borders given its role as a primary provider of bibliographic and authority records for Hebraica, Judaica, and Palestinian resources and entities. An examination of RDA adoption in Israel sheds light not only on the management of change in a complex situation but also explains idiosyncrasies in Israeli cataloguing records.

Keywords: RDA, Israel, implementation planning, localization, cataloguing

The structure of the Israeli cataloguing world

Israeli cataloguing has had an uneasy relationship with Anglo American cataloguing rules for over a hundred years. Cataloguing first came to the country when founding father David Yellin went to Berlin to learn from Heinrich Loewe and brought the information back to Ottoman-era Palestine (Schidorsky, 1990). Despite its origins in the Germanic library tradition, Palestinian librarianship soon turned towards the American tradition. Zechariah Fishman of the Bnei Brith library (whose collection formed the nucleus of the National Library) was rooted in German traditions of librarianship (Schidorsky, 1982), but it was to New York he went in 1919 to pursue a formal degree in library science (Galron-Goldschläger, n.d.). American traditions dominated the Palestinian library world until 1936, when German refugees filled top positions in the Jewish National and University Library (JNUL, later the National Library of Israel - NLI) (Kahan Eber, 1938). In the late 1940s C.D. Wormann, a German public librarian, took over the reins of JNUL and opened Israel's first library school (Ernst, 1975). The American tradition of librarianship once again became dominant (Keren, 1984) and remains so to this day.

Despite this, Anglo-American cataloguing rules have been adopted more in principle than in practice by most Israeli libraries. Many public and school librarians have little to no professional training and are unaware of cataloguing codes; though the academic library world claims to follow international and national guidelines (Adler & Shichor, 1980), examinations of actual bibliographic and authority records (for example, Kedar, 2009) show serious deviations from standards.

Who sets cataloguing standards? The answer lies in the hierarchical build of the Israeli library world. Public, school and special librarians have no say at all in setting policy; college librarians have a cataloguing committee whose decisions have only the force of recommendations. University libraries, including NLI, have more standing, as their committees were formed at the order of the Council for Higher Education.

The inter-university cataloguing committee (IUCC) was founded in 1983 as a subcommittee of the Standing Committee of the National and University Libraries (SCONUL) (Shoham, 2006). Its mandate was to encourage uniform cataloguing rules and procedures within university libraries (Adler, 1991). It is subject to little oversight by SCONUL and to none by any other body. As part of SCONUL, the subcommittee includes representatives from nearly all universities. (The newest university, still contractually connected to the Israel College Consortium [ICC], is not represented.) The 45 member ICC is represented by a single non-voting member *ex officio*; public, school, and special libraries are not represented at all, though cataloguing records created by the Israel Center for Libraries serve far more libraries than do records created by any other single institution (Shoham, 2006). This disparity is nothing new; in the 1950s Sophie Udin, formerly the chief cataloguer at JNUL, "observed that, instead of cooperating, Israeli libraries tended to be rivals" (Keren, 1984, p. 107).

Because of this hierarchy, disagreements have traditionally been resolved in favour of the universities. Despite having no official standing outside university libraries, the IUCC calls itself, and is commonly called by others, the "national cataloguing committee." The IUCC is the only Israeli library committee which expects its policy statements to be followed by unrepresented institutions, ensuring compliance, in part, through weekly tests of national union catalogue records tailored to IUCC standards. It was the IUCC that set cataloguing standards in the era of AACR2 and it is the IUCC which has had to struggle with the two

challenges of RDA implementation in the Israeli multilingual cataloguing environment – adoption and adaptation.

Planning for adoption

The Israeli library world first heard of RDA in a 2008 article by Dr. Rochelle Kedar of Bar Ilan University. At that early stage she asked:

> What shall we do in Israel? One option is not to do anything just yet, to wait until RDA is published. That's not a bad idea, considering the critiques of RDA. The second option is to get to know the RDA draft published by the JSC and to think about the implications for us, how we will have to revise Israeli cataloguing rules and how we will publicize those changes. There is a definite need to establish an Israeli committee on cataloguing rules which will learn the new rules (from the published drafts) and will plan future implementation. (Kedar, 2008, p. 55, original in Hebrew)

Over the next three years Kedar would continue to sound an early warning about RDA at professional conferences, but the rest of the cataloguing world lay dormant. "I kept saying to people 'Things are going to change'," said Kedar. Her words were not heeded. "Nobody really got into this."

This lack of action was not for lack of information; NLI experts were yearly visitors to the Association of Jewish Libraries conference and had heard talk of RDA for several years before they brought word back to Israel. In 2010 there was some discussion of RDA among cataloguing leaders, but at that time it was decided to put any further discussion of the matter on the back burner (Goldsmith & Adler, 2014).

In 2012 it became clear that RDA would be implemented at the Library of Congress and in OCLC, the source of much foreign-language cataloguing copy for university libraries. In November of 2012 the IUCC sent a letter to the SCONUL chair stating that RDA would be adopted by university libraries no earlier than Fall 2013. The letter reassured library directors that the change would have minimal impact on catalogues.

This was the last official announcement about Zero Day for implementation and the last hint that the switch to RDA in academic libraries would be coordinated.

The Israeli librarian association (ASMI) scheduled RDA training for January 2013; it was quickly postponed to late April. "[The IUCC] didn't like the training I offered," said Shahaf HaGafny, then chairman of the ICC cataloguing committee and of ASMI. "They told me 'At least wait until [RDA] begins [in the US] on the 1st of April." In an announcement to the Israeli Information Retrieval Specialists e-mail list HaGafny stated that the postponement was due to disagreements about RDA "in Washington D.C. and in Ohio about some of the new [MARC] fields."

In March, 2013, the computer system supporting the national union catalogue (Ex Libris's Aleph) was updated to support RDA-compliant MARC fields and a week later Ex Libris distributed new help files to be integrated into Aleph staff interfaces. On the 25th of that month instructions for copy-cataloguing in RDA were issued by the IUCC RDA

subcommittee as the first step in implementation. (These initial rules have never been revised or rescinded though they are no longer followed in practice.)

The postponed ASMI RDA training was held on April 23, 2013, and was reprised on July 15 of that year, each time with over 100 attendees representing university, college, public, and special libraries. The training consisted of lectures by HaGafny, with no practice sessions, and the material did not take into account the copy-cataloguing instructions issued by the IUCC.

After the IUCC spent 2012 and the first half of 2013 trying to understand the theoretical model behind RDA, it was decided that expertise would have to be imported. "There wasn't anybody in this country who was capable of teaching us on the level we needed to be," said Marina Goldsmith, head of foreign language cataloguing at NLI and chair of the IUCC. After the first invited speaker cancelled and other invitees declined invitations to Israel, Adam Schiff of the University of Washington agreed to lead a seven-day workshop for university cataloguers at NLI. The workshop was held in August, 2013, and Schiff's English-language PowerPoint presentations, based on the RDA Toolkit without localized IUCC decisions, have been made publically available on the NLI website. "It cost money, a thousand shekel a head," complained HaGafny, "[Schiff] brought examples in English and no examples in Hebrew." The goal of the workshop was a "plain vanilla introduction to RDA for our [foreign language] cataloguing," said Prof. Elhanan Adler of NLI, the doyen of Israeli cataloguing.

University and NLI cataloguers were invited to the workshop. The week was not widely advertised and only two college cataloguers attended. "It's a pity [more] didn't come," said one member of the IUCC RDA subcommittee. "National cooperation is very important. We're in the same union catalogue, so it's very important to me."

This training was the second part of the IUCC three-part plan for implementing RDA in Israel: copy-cataloguing rules, the "training the trainers" workshop, and, finally, widespread training for cataloguers producing original records (Goldsmith & Adler, 2014). Though the first two parts of the plan were realized, widespread training for creating original records in Hebrew or Arabic was never held.

As the Library of Congress and OCLC settled into RDA implementation Israeli planning hit its stride. Though previous innovations in cataloguing (such as automation and MARC) had taken decades to reach Israel, the IUCC decided that RDA would be implemented very soon after LC and OCLC adoption. Because NLI and university libraries largely copy-catalogue their foreign language resources there was a sense that Israel's hand was forced and change could not be delayed. "It's a big mess," said Adler, "but that is where we are and that is where the world is going and as a small country we don't have all that much choice."

The Fall of 2013 arrived, but only one college library adopted RDA. In its September 12, 2013, newsletter the Israel Center for Libraries stated that academic libraries would be adopting RDA in January, 2014, and that public libraries would be following suit shortly thereafter. This was the last Hebrew information on RDA implementation published anywhere. Starting in 2014 academic libraries began adopting RDA at random.

Fall 2013 also saw the partial publication of the new Israeli cataloguing textbook, *Omanut ha-Ḳiṭlug (The art of cataloguing)* written by Adler and Kedar, both IUCC observers. Neither is a working cataloguer but both are veteran cataloguing teachers and were co-authors of the

previous Israeli cataloguing textbook (Adler, Shichor, & Kedar, 1995). The new book is a re-working of the earlier text, switching out AACR2 rules for RDA guidelines. It was released under a Creative Commons license and is housed on the NLI website.

"The [Israel] Center [for Libraries] was willing to put it out as a book," said Adler, recalling how previous cataloguing texts had been issued. "But, first of all, that means it's got to be finished…. Let's make it an open access book. We can call it a work in progress, because the rules are not written in stone yet. Things are changing. So when they change we'll just go in and change – that's why each chapter has an update date at the beginning….It's much easier to do a whole book this way." The format promised much, but chapters unwritten at the book's launch in 2013 have yet to be written, leaving Israeli librarians without rules for cataloguing continuing and integrating resources, music, and other non-book materials, with no information on how to encode RDA in MARC, and no revised guidelines on Romanization. Updates have rarely been made; the rules for descriptive cataloguing, which are the main bulk of the book, were last updated in August, 2014, and the appendix on relationship designators, including only terms from Appendix I, was last revised in March, 2014.

The book makes no claim to be a translation of RDA. "If people are already cataloguing on the university or even on the college level, their English should be of a high enough level to understand [the Toolkit]," said Goldsmith. Even before the format of *Omanut Ha-Ḳiṭlug* was finalized, the co-authors were contacted by ALA Publishing and reminded that translation rights had to be licensed. "This thing is a Hebrew book," said Adler. "It is in no way a translation of RDA." And, indeed, it is not; though the book uses RDA guidelines it is structured like the AACR2 rulebook.

The free and open publication of Israeli RDA rules did not increase the rate of adoption. In January, 2014, a second college library adopted RDA after misinterpreting a personal communication from Adler that RDA would be implemented "no sooner than January 1" as "on January 1." In February, 2014, Adler announced to the Hebrew NACO funnel email list that Israeli libraries would be starting to catalogue in full RDA and that Israeli RDA records would be available in WorldCat by May or June. No parallel announcement was made to the Israeli library world, but an Israeli RDA email list was created and advertised to Israeli academic librarians. RDA-IL had a few short flurries of conversation, primarily about linked data, and went dormant by the end of June, 2014, just as academic libraries began trickling towards RDA implementation.

Over the course of 2014 and 2015 the IUCC RDA subcommittee issued only a small number of rules: production/publication statements for theses and dissertations, production/publication statements for print-on-demand books, and rules for cataloguing serials. Questions to the subcommittee from university cataloguers were addressed by cutting and pasting RDA Toolkit sections into the subcommittee protocol.

RDA or AACR3?

Though the style of *Omanut Ha-Ḳiṭlug* could be attributed to financial constraints, the decision of the IUCC to issue rulings based on formats rather than on WEMI cannot. Removing the theoretical framework from RDA cataloguing was a principle for the IUCC, the RDA subcommittee, and NLI.

There was a feeling amongst decision makers that the theory behind RDA was beyond Israeli cataloguers' interest level or ability to comprehend. "The whole concept of WEMI was a little bit over people's heads," said Kedar. "I kept telling people it's not that bad. 80%-85% of RDA, it's the same. But when it's not 'That's it, now you have to work this way' people pay attention for the hour of the lecture or maybe they scan the article and that's it."

"The main reason to know WEMI is in order to use the Toolkit," explained Adler. "You can use *Omanut Ha-Ḳiṭlug* without [it]. There's this WEMI thing, the theoretical thing in chapter one, but you don't really need it to do actual cataloguing. […] You [the IUCC and its subcommittee] just make a decision and tell everybody what to do. They don't have to understand the philosophy behind it."

Neither the ASMI training, the training-the-trainers course, nor the subsequent local RDA training placed an emphasis on theory. "I spoke to a couple of people who went to [HaGafny's] training and he didn't give any of the theoretical background. […] In the National Library we did that very minimally," said Goldsmith. "I was asked to do the training and not to present it."

In order to make decisions and to teach without a theoretical basis, RDA was divided in two: "small RDA" (the technical changes in the bibliographic record due to RDA-in-MARC, basically AACR3) and "large RDA" (FRBR, FRAD, and FRSAD). Because of the emphasis on "small RDA" few in Israel have seen the point of the new cataloguing guidelines. "You can do a lot of things that make sense to do, and there's no big revolution in that," said Adler. "They took a mouse and turned it into an elephant. It's no big deal," agreed HaGafny.

Israeli librarians who have made a study of RDA have warned that "small RDA" will, in the long run, be insufficient. "If everyone in the world implements small RDA, you could rest easy. But if not, it is misleading. You could do perfect work if you had all the information about RDA, but you're not going to get that now."

Instead of attempting to inculcate a "large RDA" worldview, RDA subcommittee implementation decisions focused on adapting "small RDA" to local conditions.

Adaptation of RDA

Though the switch to RDA solved some long-standing problems in Israeli cataloguing, primarily the issue of plene and defective spelling, adoption has been complicated by three factors: 1. Records may be created in any of four languages used by the Israeli library world: Arabic, English, Hebrew, or Russian; 2. RDA reflects an Anglo-American view of the bibliographic universe as a well-ordered space; and 3. RDA is written in English, a semantically-rich and gender-neutral language.

English terminology is drawn from the Toolkit. A handful of Russian terms were locally translated in 2014. Hebrew terms were translated locally, and Arabic proved a sticking point: should terminology mimic the Arab cataloguing world? It was decided that Israeli Arabic cataloguing must fall in line with Israeli Hebrew cataloguing; all Arabic translations were created by subcommittee members without reference to the wider Arab world.

The strongest argument for this uniformity is that Hebrew and Arabic publishing conventions are similar and unlike the well-ordered Anglophone bibliographic universe. Few books are "published"; as in other Middle Eastern countries they are usually "printed." Some of the "printers" are publishers, some truly printers. How can the neat divisions of RDA 2.7-2.10 be applied in a consistent manner? If "Printed in Israel" is a publication statement, are all instances of "printed" to be read as "published"? Is "Fifth Printing" an edition (publication) statement? What type of statement is "Printed anew with added commentaries"?

The inconsistencies spill over into other elements. To assist foreigners in ordering Israeli books, English titles are printed on the title page verso, though there is no English content in the expression. Are these promotional titles subject to RDA 2.3.3.2, or does treating them as parallel titles mislead the reader? When, for reasons of modesty, authors of religious publications self-identify as editors, do we believe the title page and consider the text as being without author? Do we override the title page, and if so, with what justification?

Israeli law calls other elements into question. For example, section 5B of the 2013 Israeli Law for the Protection of Literature and Authors mandates placing the date of printing on a first edition's cover. Does this date serve as a publication statement? Does this date justify an edition statement?

In deciding these questions the IUCC turned to Israeli cataloguing history rather than to RDA, leading to a lack of standardization between original cataloguing created in Israel and records created abroad.

Before translation could even begin, a larger question needed to be addressed: would Israeli cataloguing continue to use Hebrew and Arabic controlled vocabulary in non-note fields or would English language terms, as given in the Toolkit, be used? In part as a reader service and in part due to complications in displaying right-to-left and left-to-right languages in a single field, it was decided that controlled vocabulary would be translated for fields which would include vernacular wording.

Hebrew is a poorer language than is English. Relationship designators proved a nearly insurmountable challenge, and three years after the start of translation, work on Appendices I-M is barely begun. Terms such as "container of" go from problematic to absurd when translated. Words which Hebrew lacks are often replaced by transliterated English until the Academy of the Hebrew Language creates an official term. Sometimes official terms are not adopted by the professional community, which prefers the transliterated term or a mix of Hebrew and transliterated English. Official Hebrew terms are often out of date and unusable: the translation of "makeup artist," *mefarkes*, dates from 1940; a speaker of modern Hebrew would understand this as a person undergoing seizures. The RDA subcommittee had to decide when to insist on proper Hebrew, when to follow professional usage, when to invent a term, and when to compromise on transliterations.

Even after the translation project is finished, it is unlikely that Israeli cataloguers will properly describe relationships. Because of copyright restrictions, translated terms are distributed as part of *Omanut Ha-Ḳiṭlug* but the Toolkit definitions are not. Most Aleph libraries have copied the terms into drop-down lists stripped of their WEMI levels, leaving cataloguers to apply them without guidance. Thus annotator, *meʿir* (using the same root as the term for "notes" - *heʿarot*), is often used for writers of added commentary. Writers of exegesis become commentators, members of pedagogical committees become panellists.

Respondents are listed on legal resources and curators are given primary responsibility for art catalogues. Every non-profit involved in a resource becomes an issuing body and the distinction between "writer of supplementary textual content" and "writer of added text" is lost.

A more serious problem is that Hebrew and Arabic are gendered languages. In March, 2014, the IUCC announced that all terms referring to FRBR Group 2 entities would be in masculine form only (Goldsmith & Adler, 2014). The colleges, which had long used the AACR2 option of crediting illustrators and translators and used gendered language to do so, objected to this policy.

The subsequent debate invoked everything from feminist politics to cataloguing tradition, from international standards to modern Hebrew grammar. The distinction between men and women filling the same role is "an important distinction," said one ICC cataloguing department manager. Since authority records in most Israeli academic libraries are not greatly detailed and have limited public access, the ICC libraries feared losing the semantic distinction between male and female would mean important data would no longer be available to patrons.

In June, 2014, the ICC cataloguing committee decided to allow libraries freedom of action. Those who wished to follow the IUCC ruling could and those who chose to use gendered language were free to do so. Some ICC directors condemned the decision; one stated, "Decisions taken in contradiction to those of the university cataloguing committee are inappropriate and weaken the professional status of librarians. It is embarrassing and confusing to have the ICC make announcements which contradict the national cataloguing committee. I suggest that at this stage we relinquish our creativity and our principles, as important as they may be."

Many colleges, bolstered by the realization that the weekly national union catalogue testing does not look at content, took advantage of the opportunity to diverge from IUCC practice in other areas as well. What in the past was matter of error now became a matter of principle. Some colleges decided to implement RDA only partially and create all manner of hybrid records while others decided not to implement RDA at all.

The future of RDA implementation in Israel

Despite the flawed management of implementation, Israeli cataloguing records are of a quality comparable to those of other countries, and NLI was picked to be the first non-Anglophone NACO member. How can this be explained?

One possibility is suggested by Jean Harden's study of inadvertent RDA (2012): because cataloguers receive little academic training (one semester for certified librarians, none for paraprofessionals) and because Israeli rules are infrequently revised and are poorly communicated, cataloguers may have already been creating RDA-type records while AACR2 was still the standard. If this is the case, bibliographic records could be improved by bringing veteran cataloguers into the decision-making process and allowing them to review guidelines and terminology based on their intuition.

Another possibility is that in a world with an increasing percentage of copied cataloguing records, not every cataloguer need know cataloguing guidelines.

What is certain is the need for faster implementation decisions and better top-down communication. Cataloguers cannot be relied upon to accidentally create quality RDA records which can be shared on the national and international level.

Unlike the Library of Congress (Morris & Wiggins, 2016), Israeli libraries have not assigned staff members to the localization of RDA. Those involved in the implementation are management-level and often have no choice but to use personal time for RDA work, leading to significant lags in the workflow. If the IUCC wishes to regain the supremacy it once held and to mandate compliance with national and international standards, it must widen the power base and allow cataloguers with specialized expertise and the desire to make a difference to participate, even if they are employed outside the circle of universities.

Acknowledgments

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