

**Minutes (Draft)**  
**Bibliographic Standards Committee**

ALA Midwinter Conference  
Saturday, February 10, 2018, 8:30 - 11:30 am  
Sheraton Denver Downtown, Room Silver  
Denver, CO



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2. Settlement of the agenda
3. Approval of 2017 Annual minutes
4. Consent agenda (no items)
5. Updates from the BSC Chair
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  - b. Experts Directory status (Lapka for Isaac)
6. DCRM(MSS): Descriptive Cataloging of Rare Materials (Manuscripts) (Nichols)
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11. LD4P Rare Materials Ontology Extension (Pearson)
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Appendix A: Midwinter 2018 Report of the Working Group for the Review of Web Resources for the Rare Materials Cataloger

Appendix B: Minutes of the Jan. 23, 2018 BSC virtual meeting

Appendix C: Standard Citation Forms Editorial Group Report for Midwinter 2018

**1. Introduction of members and visitors**

Members present: Francis Lapka, Yale Center for British Art (chair); Brenna Bychowski, Beinecke Library, Yale; Ellen Cordes, Lewis Walpole Library, Yale; Kalan Knudson Davis, University of Minnesota; Elizabeth Hobart, Penn State; Deborah J. Leslie, Folger Shakespeare Library; Michelle Mascaro, University of California San Diego; Kate Moriarty, Saint Louis University (secretary); Iris O'Brien, British Library; Brian Stearns, University of Alberta; Amy Tims, American Antiquarian Society (CC:DA liaison).

Liaisons: Liz Call, University of Rochester (RBMS Executive Committee).

Visitors: Alison Bridger, Wisconsin Historical Society; Emily Epstein, University of Colorado Health Sciences; Jane Gillis, Beinecke Library, Yale; Nancy Kandoian, New York Public Library; Martha Lawler, Louisiana State University-Shreveport; Erin Leach, University of Georgia; Anne Marie Lyons, Atlas Systems; Arvid Nelson, Southern Methodist University; Jennifer Nelson, Robbins Collection, University of California Berkeley; Margaret Nichols, Cornell University; Phyllis Payne, Boston University; Audrey Pearson, Yale University; Melissa Robohn, U.S. Air Force Academy Special Collections; Noah Sheola, Boston College; Beth Shoemaker, Rose Library, Emory University; Brittney Washington, Folger Shakespeare Library;

Members absent: Amy Brown, Boston College (ex-officio: Controlled Vocabularies editor); Linda Isaac, University of Miami; Jason Kovari, Cornell University.

## **2. Settlement of the agenda**

Alison Bridger will be reporting on DCRM(MSS) for Margaret Nichols, who will be late due to a plane delay.

## **3. Approval of 2017 Annual minutes**

The 2017 Annual minutes were approved unanimously pending minor corrections submitted to the secretary before the meeting.

## **4. Consent agenda**

There were no consent agenda items.

## **5. Updates from the BSC Chair**

### **a. RBMS CC:DA Liaison, call for volunteers**

Prior to the submission of this agenda item, Francis Lapka had sent out a call for volunteers to replace Amy Tims when her liaison term expires after ALA Annual 2018. Lapka has since received interest from a strong candidate but asked anyone else interested to contact him as other opportunities may arise.

### **b. Experts Directory status (Lapka for Isaac)**

Lapka reported that Linda Isaac has been heading up this initiative to provide a resource for catalogers and others seeking long-term engagement with or ongoing advice from an expert. It is not a replacement for the DCRM-L electronic list. The directory has been in development but there is a holdup with the RBMS website. Isaac recommends waiting until the completion of a Web Team project to migrate some archives from the RBMS website before moving forward. There is no timeline at this point.

## **6. DCRM(MSS): Descriptive Cataloging of Rare Materials (Manuscripts) (Nichols)**

Alison Bridger reported for Margaret Nichols. In 2017, the editorial team conducted several workshops on applying DCRM(MSS), including a recent event at The Morgan Library. The ALA-sponsored February 12 workshop at the Denver Public Library is sold out. Upcoming workshops will be conducted for the Society of North Carolina Archivists in Durham in March and the Metropolitan New York Library Council in New York City in May.

The team had submitted the DCRM(MSS) instructions for the RDA-based Bibliographic Standard Record (BSR) Metadata Application Profile but the BSR is frozen until the completion of the RDA 3R project.

## **7. DCRM(S): Descriptive Cataloging of Rare Materials (Serials) -- Examples (Gillis)**

### *Examples to Accompany Descriptive Cataloging of Rare Materials (Serials)*

Jane Gillis reported that she, Annie Copeland, Stephen Skuce (now retired), and Randy Brandt have been working for a number of years on *Examples to Accompany Descriptive Cataloging of Rare Materials (Serials)*, a draft of which was posted for the meeting:

<http://rbms.info/files/dcrm/dcrms/Examples.pdf>. The Beinecke Library has supported the project throughout with meeting space and the provision of digital images.

The resource consists of 50 example catalog records with images at the end of each example. The final form will mirror that of *Examples to Accompany Descriptive Cataloging of Rare Materials (Books)* (called [DCRM\(B\) Examples](#) in Cataloger's Desktop) and will be hosted by Cataloger's Desktop. The resource will also be freely available but a subscription to Cataloger's Desktop will be required to utilize its hyperlinks. Images that come from the Beinecke Library (roughly 90% of the images) have a URL linking to the Yale Digital Library scan with additional metadata and zoom capability.

The team is asking for a close review of the document. This would include checking links, punctuation, MARC coding, standard citation forms, the correct application of the rules and the correct rules used, and the content of the cataloging. They are not looking for suggestions on revising the DCRM(S) guidelines. If an additional example is needed, contact the editors with the suggestion.

In the discussion, many people expressed their thanks and appreciation for the examples and noted the value of having the images. Lapka reiterated what a terrific resource it is and stated that this is BSC's last AACR2-based resource and that the fully developed examples and rich set of images will not only help the many who currently continue to use DCRM(S) with AACR2 but can be converted to RDA when we make the transition. It was noted that there are a few instances of fields that contain local information but lack the subfield \$5. Based on a suggestion, Gillis will check to see if links to MARC fields could direct to the freely available [MARC 21 Format for Bibliographic Data](#) instead of to MARC within Cataloger's Desktop. Lapka anticipated that the close reading would begin in March. A brainstorm of close-reading procedures followed: small numbers of people examine a few examples; a couple of reviewers commit to reviewing the entire document; reviewers

focus on specific fields across all examples; send an invitation to DCRM-L for non-BSC participants; use Google Docs. Lapka will work with Gillis to develop clear and concise instructions and find the right technology for review and commenting.

### Manuscript serials

The DCRM(S) editors are writing cataloging rules for manuscript serials as an appendix to DCRM(S). They will be working with one of the editors of DCRM(MSS) to help inform the appendix. At this early stage they are focusing on defining and determining what qualifies as a manuscript serial. Discussion included questions and suggestions: is the output of amateur press associations considered a manuscript serial? Typescript serials? Unprinted ship's newspapers? Serials with chronological information but not numeration, such as 17th-century manuscript newsletters, would qualify. Photocopied material will be excluded. The community is encouraged to send photos of possible specimens to the DCRM(S) team for consideration. Copeland will be visiting libraries to view their manuscript serials.

[N.B. Since the meeting, Lapka solicited via DCRM-L volunteers for the review of DCRM(S) examples and sent BSC members and volunteers their assignments.]

## **8. Controlled Vocabularies Editorial Group (Bychowski)**

Brenna Bychowski reported for co-editors Amy Brown and Ryan Hildebrand. In preparation for publishing the [RBMS Controlled Vocabularies](#) as linked open data, the editorial group is conducting a thorough evaluation of the vocabularies. A survey they sent out in January has already received enormous response and will be up for two more weeks. The intention is to create a resource that is useful and does not duplicate other vocabularies. Any major thesaurus decisions will be submitted for feedback.

In response to questions and discussion, Bychowski reported that at the moment, the editorial group is imagining one complete thesaurus and is reconceptualizing the hierarchies. The source code may be "rbms." The current thesauri may remain available with a notice that they are not being updated. There may be a crosswalk to help with the transition to the new vocabularies. The group will tackle the issue of hosting once they have determined the content. Data from the survey will help in determining what terms remain in the thesaurus. For instance, they would consider eliminating many terms from the [Binding Terms](#) thesaurus if most people use Ligatus's [Language of Bindings](#). It was pointed out that retaining some binding terms could cause more work in needing to search both thesauri.

The group's planned next step is to finish the evaluation of the individual terms (they are currently in the Cs) then look at the question of deduplication and identify any large batches of terms no longer needed in the thesaurus. Since it is so time-intensive to completely evaluate a thesaurus term by term, the group was encouraged to consider stepping back and looking at the big picture. One idea for consideration was to focus our vocabularies on certain domains and for other domains, propose terms to outside thesauri.

There was general interest in additional discussion. The editorial group was asked to look into developing a few recommendations by the Annual meeting and coordinate with the RBMS Technical Services Discussion Group and BSC to include discussion time on their Annual 2018 agendas.

## **9. Web Resources for the Rare Materials Cataloger (Davis)**

See Appendix A for the written report of the Working Group for the Review of Web Resources for the Rare Materials Cataloger.

Reporting for Working Group chair, Matthew Ducmanas, Kalan Davis provided background on the history of the resource and reviewed the group's task and the recommendations presented in their written report. In its analysis, the group affirmed the resource's continued relevance and recommended migrating it to the RBMS-hosted WordPress page, changing some of the content, making significant updates to its display and navigational structure, and conducting a survey to gain feedback on the issues they are considering. The new resource will have an online form for suggesting additional links/resources.

During the discussion, several attendees expressed their appreciation for both keeping the resource and updating its structure. Finding the right balance between an endless list and too many divisions may be challenging. The group was also asked to consider a search function. Ideas to address the possibility of receiving too many and/or irrelevant submissions for additional content included the development of a scope statement, a standing subcommittee that manages the resource, and/or bringing decisions to the BSC for discussion.

The group is currently finishing the review of the resource's contents. By annual they plan to finish the review, conduct the survey, develop a new structure, and begin filling out the skeleton. Migration to the RBMS server will follow. The group was asked to confirm that the current site, hosted by New Mexico State, will not be taken down before its migration.

## **10. BSC-Sponsored RBMS Conference programs**

### **a. 2018: New Orleans**

#### **i. Workshop: [Cataloging Rare Materials using RDF](#)**

Audrey Pearson reported. The full-day workshop will be lead by Jason Kovari, Linda Isaac, and Audrey Pearson and will be closely tied to the Rare Materials Ontology Extension (RareMat). The first part will give an overview of linked data concepts, general modeling, and RDF followed by a modeling exercise. This will provide the background for the second part, which will go into more detail of and solicit feedback on RareMat. No experience with RDF is needed. A laptop is required and the workshop leaders will reach out to registrants beforehand to make sure they are set up. It was noted that the workshop description does not mention the laptop requirement. Pearson will ask to have that information added. The team is hoping to do a test run at Yale. There was a suggestion to provide registrants with a reading assignment prior to the workshop. [N.B. An instruction to bring a laptop has since been added to the workshop description.]

ii. Seminar: RBMS Policy Statements

Seminar description on the conference website: [From DCRM Manuals to RBMS Policy Statements](#).

The seminar will be convened by Francis Lapka and conducted by Deborah J. Leslie, Audrey Pearson, and Michelle Mascaro. It will address issues such as changes from DCRM to the RBMS policy statements, the technical infrastructure, how the policy statements build off RDA, and the editorial conventions and environment. It was noted that the delay in the 3R project makes the design of the seminar challenging.

b. 2019: TBA

Lapka solicited ideas and noted that the deadlines are soon. He will post a call to DCRM-L and can be emailed directly with more ideas.

Workshop suggestions

- Cataloging rare materials with RDA and the RBMS policy statements. 2019 is too early but we will hold the idea for the future. Would it focus on one format, such as books, or have a wider scope?
- A repeat of the cataloging Latin resources workshop.
- A paleography workshop.
- Training on contributing to CERL's [Material Evidence in Incunabula](#) (MEI). A recent workshop at Columbia University ran for two days. Would they be willing to do an abridged one-day version? Lapka will get in touch with CERL secretary Cristina Dondi.

Seminar suggestions

- Web resources (after the launch of the new Web Resources for the Rare Materials Cataloger)
- A forum on the use of genre/form vocabularies would not have enough of a teaching component to be a seminar but may be added to a Technical Services Discussion Group agenda.

Participant-driven suggestions

- Last year's item-specific metadata/institution records proposal was rejected as not participatory enough.

## 11. LD4P Rare Materials Ontology Extension (Pearson)

See Appendix B for the minutes of the January 23 BSC virtual meeting on the LD4P Rare Materials Ontology Extension (RareMat) and access to the slides from Jason Kovari's presentation.

Audrey Pearson recapped the January 23 virtual meeting and reported that the team is currently finishing the modeling and writing the OWL ontology. Following that they will develop an application profile for the rare books format and issue their recommendations. LD4P ends June 30 but the work to develop a rare materials ontology extension will not be over. In addition to the BSC review of RareMat,

feedback will be solicited at the June 19 [Cataloging Rare Materials using RDF](#) workshop for future follow-up.

Discussion included a recommendation to consider representing elements that are DCRM-compliant in the use cases. Pearson stated that specific cataloging standards are used more in the development of application profiles than use cases but will relay the recommendation to the RareMat team. In answer to a question, Pearson also believes that the forthcoming RareMat OWL files will be able to be loaded into the Vitro editor. Regarding BSC review of the RareMat model, there was a request for information on how to read Turtle files.

Lapka thanked the RareMat team and expressed his appreciation for the amount and quality of their work. He will develop assignments for BSC members to review and provide feedback on the individual models, probably after the close reading of the DCRM(S) examples.

## **12. Report of the RBMS Liaison to the Committee on Cataloging: Description and Access (CC:DA) (Tims)**

Amy Tims reported that CC:DA activity continues to be quiet due to the RDA 3R project and that most of the work is being done by a core group. The date of the 3R release is June 13, 2018. Several changes to RDA governance are in process. Kathy Glennan was elected chair-elect and will replace chair Gordon Dunsire in January 2019. Pursuant to the goal to make RDA an international standard, changes in structural governance mean that ALA will no longer have a direct line to the RDA Steering Committee. There will be an RDA North American Committee on which ALA will have a representative. Tims is on a recently-formed task force for the review of the Chinese cataloging guidelines and welcomes insights and opinions from those with knowledge of the history of the book in China. The next CC:DA meeting is Monday, 8:30-11:30 in Sheraton Ballroom F.

## **13. RBMS Policy Statements (Mascaro)**

### Activity since Annual

Michelle Mascaro thanked Pearson, Lapka, and Tims for their work in cleaning up the initial policy statement (PS) drafts for community review and Davis for re-formatting the documents. Elizabeth Hobart was also recognized for her work in completing the policy statements for music. The group working on the examples has gotten to RDA chapter 3 and will have the examples ready by Annual. The initial community review has been started by posting several broad-issue questions to DCRM-L.

### Remaining work

#### Outstanding sections

The two outstanding sections are cartographics and graphics. The cartographics group is in conversation with MAGIRT on an outstanding issue but is otherwise mostly finished. A small group was recently formed to draft text for recently proposed solutions to the remaining graphics areas.

Work to be addressed after the RDA 3R completion

The relationship chapters will remain on hold until after the 3R is complete and the current draft PSs will need to be updated based on the 3R changes. There will then be a close review of the updated PSs and some sort of public hearing.

Discussion ensued on the form of the public hearing. Mascaro reported that ACRL still requires a public hearing but has widened the definition to demonstrating that public comment was solicited from beyond the group that authored the resource. This can take the form of the ALA Annual and Midwinter in-person public hearings BSC editors have conducted in the past, a webinar, dedicating time for public discussion at a BSC meeting, or soliciting comments on a discussion list or blog. There was agreement on the value of public hearings in providing both community feedback and buy-in. It was also noted that we will need to strike a balance between engaging the wider community and publishing the PSs in a timely manner. Between face-to-face and online venues, we have multiple options for engaging the community. There was general support for having an in-person public hearing, preferably at Annual versus Midwinter due to better attendance, and a virtual forum, either by live streaming the in-person hearing or holding a separate, online hearing.

#### Publication timeline

The 3R project will be completed in June. Since most of the remaining PS work cannot begin until the completion of the 3R, the PSs will not be ready for the August RDA Toolkit release. The date of the next Toolkit release will not be determined until the October RDA Steering Committee meeting. We will need to build in the time it takes to code our text in the Toolkit before the release.

#### Soliciting review

Since response to questions posted on DCRM-L have been limited (several people realized later that their posts did not get published due to changes in their email addresses; DCRM-L does not notify when posts are dropped), Mascaro asked for ideas on better soliciting community review. It was decided that for broad-issue questions, BSC will hold one or two virtual meetings following Midwinter. For questions requiring a yes/no answer, a poll will be conducted via ALA Connect or another tool with commenting functionality and community access to poll results. There was also a question on posting to RDA-L to get more feedback.

#### Rare materials provisions in the BSR

Currently the BSR has provisions for rare materials. The PCC Standing Committee on Policy is currently examining the question of updating the BSR once the RBMS PSs are released and whenever RBMS PS changes are made. Should the provisions for rare materials be removed and replaced with a reference to the RBMS PSs? A brief discussion yielded varied opinions and it was decided that further discussion would take place online after we hear the PCC decision. One concern expressed with removing the rare-materials provisions is that the BSR can serve as a cheat sheet.

#### Responses to questions posted to DCRM-L

Mascaro reported that she has created and shared with the BSC, Google docs that compile the responses to each of the questions posted to DCRM-L between November 2017 and January 2018.



She will send out the link after the meeting. So far, the feedback does not indicate significant changes are needed to the PS recommendations.

Q1: Core elements.

Consensus is to not make item-level elements core. The proposed list of core elements needs clarification on whether an element is “core” or “core if” and further discussion is needed on whether to retain in our core list all of the LC-PCC core elements.

Q2: Transcription.

There was varied response to the issue of correcting inaccuracies in transcription fields. The proposed outcome is to keep the current compromise which provides two options (either follow RDA or correct inaccuracies in the transcription field) but add to the PS that those following RDA should generally correct the inaccuracy in a note.

Regarding normalization, the RBMS PS’s default is to normalize text in transcription fields but offers an alternative to follow RDA in retaining punctuation and spelling. This question also engendered varied response so Mascaro asked for a straw poll to see how many would choose the RBMS PS alternative to follow RDA. The poll: a) I would faithfully transcribe punctuation and capitalization: 0 votes; b) I would transcribe according to RDA if the requirement to transcribe punctuation were omitted: 3 votes; c) I would not choose the RBMS PS alternative to follow RDA: 11+ votes.

Q3: Sources of information. There were no responses.

[N.B. Since the meeting, Mascaro sent an email to the RBMS-PS list with links to the DCRM-RDA folder which contains the Google docs on the recent DCRM-L questions. Mascaro also reposted Q3 to DCRM-L.]

#### **14. Standard Citation Forms (Moriarty / Cordes)**

See Appendix C for the written report of the Standard Citation Forms editorial group (SCF).

On behalf of the SCF editorial group, Kate Moriarty thanked Marcia Barrett, who rotated off after Annual 2017, for her leadership and work in directing the major editing and revision of SCF and transitioning SCF to an online resource. After reporting on the 59 new citation forms created since Annual 2017, Moriarty stated that the editorial group is looking for new members and that she and Ellen Cordes will lead a demonstration of the citation form-creation workflow following this meeting. Moriarty then facilitated a discussion on the SCF written report’s three questions.

Question 1: Group structure. There was general agreement that SCF should remain a subcommittee of the BSC and that the editor and vice-editor (if there is one) be BSC members but that the rest of the subcommittee could be composed of BSC and non-BSC members. Maintaining SCF’s openness to non-BSC members gives an entry to potential BSC members. Lapka pointed out that that this model could be applied to a future RBMS PS group and if BSC forms a group to support ontology extension.

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Lapka will be in touch with SCF chair Ann Myers regarding additional details of the subcommittee's structure.

Question 2: Site issues: multiple search boxes or single? With the latest WordPress upgrade, the SCF site lost its multiple search boxes (title, author, previous citation form, citation number), limiting search options to keyword only. The discussion yielded information that, if the Web Team is able to find a solution, many people still find the multiple search options desirable.

Question 3: Citations for uncataloged online resources. The SCF group is increasingly seeing citation form proposals for uncataloged online bibliographies. After discussion, the BSC agreed that the SCF group can create citation forms without first cataloging the online resource. An additional issue was raised that many SCF forms were based on AACR2 records so are out of date.

[N.B. Immediately following the meeting, Moriarty and Cordes demonstrated the process of creating citation forms. Since the meeting, Lapka has followed up with Myers on the subcommittee structure.]

### **15. Announcements from the floor**

Announcements were made regarding openings for a rare book cataloger at the University of Miami, a cataloger at the Noel Foundation, and a cartographic metadata librarian at the University of Minnesota. The Beinecke Library is accepting applications for three summer student internships, one of which will be working with the Otto Ege manuscripts.

### **16. Acknowledgements**

Lapka acknowledged Marcia Barrett's many years of leadership of the Standard Citation Forms editorial group. Barrett was given a round of applause.

### **17. Adjournment**

Lapka adjourned the meeting at 11:40 a.m.

Respectfully submitted March 6, 2018 by Kate Moriarty, RBMS Bibliographic Standards Committee secretary.

## Appendix A

# Report of the Working Group for the Review of Web Resources for the Rare Materials Cataloger

Submitted January 2018 to the ALA/ACRL/RBMS Bibliographic Standards Committee

At the request of the Bibliographic Standards Committee, the Working Group for the Review of Web Resources for the Rare Materials Cataloger generally considered the scope and form of the directory in its current state and opportunities to increase its usefulness.

### Overview

The Working Group agrees that the Web Resources for the Rare Materials Cataloger directory remains a useful tool and should continue to be maintained going forward. While the Group finds no need to alter the scope of the directory, we recognize there are significant opportunities to improve the navigability and organization of the site, expand coverage in some of its categories, and increase cataloger awareness of the resource.

### Recommendations

1. The Working Group reaffirms the continued usefulness of the directory and the plans to relocate it from the nmsu.edu server to [rbms.info](http://rbms.info).

*The Working Group discussed the continued merits of maintaining the directory given the improvements in web searching since its inception in 1997. We concluded that it remains a useful resource and should continue to be sustained and improved in its new location on the RBMS website. The web team has created the url [rbms.info/cat\\_resources](http://rbms.info/cat_resources) for this purpose.*

2. There is currently no need to alter the existing content or overall scope of the directory. However, the Working Group does recommend further consideration be given to the possible addition or expansion of some of the web resource categories or the weeding or removal of others.

*We concluded that the current scope of the directory is satisfactory but that this is a good opportunity to identify any additional categories that should be added (either immediately or as a longer term goal) or if any should be removed or reduced (prior to migrating). Ongoing solicitation of feedback from the cataloging community will be particularly helpful in considering additions/removals. Possible categories to either expand or create may include contemporary special collections materials (artists' books, fine press, zines, e-resources, etc.), archival collections, online communities (Listservs, pertinent social media, etc.), music, graphics, and linked data/BIBFRAME. In addition to possible additions, the Working Group has nearly completed an initial survey of the existing content to identify possible links for removal. This conservative weeding was mainly to gather any broken links or clearly outdated resources.*

3. The directory should no longer be presented as a single webpage and instead a more dynamic display and navigational structure should be developed. Further consideration of the current conceptual organization of the directory should be undertaken as part of this process.

*The display and navigation of the directory was an area in which the Working Group agreed significant improvements could be made. Though further examination of this is necessary, the most straightforward (and easy to implement) alternative would be to have a main page with each top-level category be represented by a menu-link that would lead to separate pages (similar to the layout of the Standard Citations Forms site<sup>1</sup>). Another similar possibility would be to utilize a series of category tabs that would expand to display each subcategory below (see screenshot example of mockup<sup>2</sup>). This development should be paired with a reexamination of the existing categories and subcategories to ensure a logical and consistent structure.*

4. The Working Group recommends an online survey be created and shared to capture structured feedback on the directory from the cataloging community.

*The survey should be distributed to the Bibliographic Standards Committee, relevant Listservs, and social media and should solicit feedback on the same aspects considered by the Working Group. This will help ensure that any changes to the scope or form of the directory will be beneficial to the community.*

5. Additional efforts can and should be made to increase cataloger awareness of the directory and facilitate the addition of new resources to the site.

*The Working Group identified a number of possible outreach efforts to boost visibility of the site and regularly gather new resources for inclusion:*

*a. Create an online form available as part of the directory in which one may submit a link/resource for consideration or general suggestions. This would be similar to the SCF's 'Submit Proposals for New Citation Forms' section.<sup>3</sup>*

*b. Periodically post calls for suggested online resources to relevant Listservs (DCRM-L, EXLIBRIS, etc.) and social media. This would link back to the directory and the submission form.*

*c. Highlight existing links or new additions to the directory via Twitter or other social media on a weekly basis to increase awareness of the site. Additionally, an occasional short post of new content could be submitted for inclusion on the RBMS News blog. When new content is added to the directory a visual indicator can be added to that link to reflect that status for a period of time.*

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<sup>1</sup> <https://rbms.info/scf/>

<sup>2</sup> <https://docs.google.com/document/d/1GzwPWxOVDeZUbYTROi16WmlCHnWkeFXyEU7R0BTL4bU/edit?usp=sharing>

<sup>3</sup> <https://rbms.info/scf/submit-proposals-for-new-citation-forms/>

**Working Group members:**

Matthew Ducmanas (editor, Web Resources for the Rare Materials Cataloger)

Larry Creider (former editor, volunteer)

Kalan Davis (volunteer)

## Appendix B

### Minutes (Draft)

#### Bibliographic Standards Committee

Virtual Meeting: Rare Materials Ontology Discussion

Zoom, Tuesday, January 23, 2018

3:00-4:30 pm Eastern Time (US and Canada)



Roughly 50 people attended a virtual meeting held to discuss the ([Linked Data for Production \(LD4P\) Rare Materials Ontology Extension \(RareMat\)](#)). The meeting consisted of an introduction to and update on RareMat, questions regarding it, and a discussion of next steps for the RareMat team and the BSC.

Francis Lapka opened the meeting by introducing Jason Kovari, who led the update and discussion, assisted by other members of the RareMat team. Kovari explained that the project is a collaboration between the BSC and the RareMat team. Its goals are to present a model that extends BIBFRAME for the description of rare materials; provide fodder for discussion of RDF models within the BSC; and provide training for members of the BSC around modeling and ontology development. Kovari noted that the goal is not to produce a complete, 100% model. He then reviewed the 10 completed models, some of which were developed in collaboration with the ArtFrame team (Accession Number; Bibliographic Citation; Custodial History; Fonts, Handwriting Types and Notations, Limitation Statement; Materials; Measurements of Part, Whole and Arrangement; Pagination and Foliation; Physical Condition; Signature Statements) and mentioned the five models still in progress: Bindings; Carriers/Bound-withs; Exhibitions; Markings; and Resource-to-Relationship mapping. He will announce on DCRM-L when the in-progress models are completed. Full documentation of the models can be accessed from the [RareMat](#) web page.

The slides from Kovari's presentation can be accessed at

[http://rbms.info/files/committees/bibliographic\\_standards/conference-docs/BSC\\_RareMat\\_update\\_20180123.pdf](http://rbms.info/files/committees/bibliographic_standards/conference-docs/BSC_RareMat_update_20180123.pdf).

Lapka thanked the RareMat team for the tremendous work and intelligent modeling they are producing. He noted that several of the topics the RareMat team tackled were also treated by the RDA Steering Committee's Rare Materials Working Group and that the RareMat modeling will help that parallel work with RDA. Additional discussion brought up potential areas for future work such as the incorporation of broad terms for typefaces (e.g. black letter) into the Fonts, Handwriting & Notation model; and exploring use cases for a model similar to the Physical Condition one that incorporates actions on a resource other than conservation, for example, "Cataloged."

Both Lapka and Kovari reiterated that this project is just the beginning of modeling linked data for rare materials. The BSC's task now is to consider and evaluate the model. Lapka will be in contact with BSC members as to the procedure of review but individuals can also provide feedback preferably by creating an issue in GitHub (<https://help.github.com/articles/creating-an-issue/>) or via DCRM-L. As the

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project concludes June 30, the team will not be able to incorporate most feedback into models at this time but the ideas will be retained for future modeling.

If the model is adopted, future BSC discussion could involve questions of the reuse of existing ontologies, such as bibliotek-o; determining if additional modeling is needed; administration and maintenance of the ontology; and collaboration with other communities.

Respectfully submitted March 6, 2018 by Kate Moriarty, RBMS Bibliographic Standards Committee secretary.

## Appendix C

### Standard Citation Forms Report for Bibliographic Standards Committee Midwinter 2018

First, we would like to formally acknowledge the work and leadership of Marcia Barrett, who rotated off the editorial team after Annual 2017. She had been our chair since 2011, and led us through the major editing and revision of Standard Citation Forms and our transition to being an online resource. We thank her for her commitment and leadership on this project.

#### Standard Citation Forms group structure

So far our group structure has been pretty informal. We've had a chair with no defined term length or limit, an informal vice-chair helping with administrative matters, and volunteers who work on creating new citation forms and discussing larger issues that arise. Most of our current volunteers have been part of this group for 6 or more years. We feel that a more formal structure would be beneficial to prevent burn-out, provide accountability, and allow more turnover in membership.

The general structure we've been discussing is to have a Chair or Editor with defined term length and limit, a Vice-Chair or Assistant Editor also with defined term length and limit, Active Members with defined term length, and Advisory Members, who are past Active Members available to help with larger issues as they arise. Three options for accomplishing this are:

1. The Chair/Editor, and possibly the Vice-Chair/Assistant Editor, are members of BSC. Active Members need not be BSC members, and could be open to anyone looking to get a little committee experience. This would be similar to how the Controlled Vocabularies group has operated.
2. The operation of SCF would fall entirely to BSC members. The Chair/Editor and Vice Chair/Assistant Editor would share administrative duties, and other BSC members would be assigned to work on SCF. This would be similar to how the RBMS Policy Statements are now managed.
3. A combination of options 1 and 2. The Chair/Editor and Vice-Chair/Assistant Editor would be BSC members, and the Active Members would include a small number of BSC members, but non-BSC members could still volunteer as well.

Current SCF group members strongly favor the options which allow for volunteers from outside BSC, as this can be a great way for new professionals to get started with BSC and RBMS.

**Question 1:** Which option do you prefer? Are there other options to consider? Whatever option we go with, we are looking for more new members, including someone willing to serve as Vice Chair/Assistant Editor!

#### Statistics



The SCF Editorial Team has created 59 new citation forms based on submitted proposals since Annual. All have been added to the [Standard Citation Forms database](#). New terms are announced semi-regularly on DCRM-L, and can always be found on the [SCF wiki](#).

The site averaged 1071 sessions and 532 users per month, which is fairly steady compared to earlier periods.

### Site issues

The plug-ins used to allow searching of the SCF database seem to run into problems every time WordPress is upgraded. The most recent upgrade turned out to be completely incompatible with the plug-in we had been using. The Web Team implemented a temporary fix which allows a single keyword search box; more research into other available plug-ins will be required to restore the multiple search boxes we had before.

**Question 2:** Are multiple search boxes still desirable/needed? (As a reminder, they provided more targeted search options including title, author, previous citation form, and citation number.) Is keyword searching sufficient, or should we continue to pursue other avenues?

### Question about online resources

We are getting an increasing number of submissions for online resources which may or may not have a catalog record. Our Working Principles state that we will base our citation forms on a catalog record. We have been struggling with what to do in these cases, as it is not practical for us to do the cataloging ourselves. We could require the proposer of the citation form to catalog the resource, but not all proposers are catalogers. In cases where there is no catalog record, we are inclined to create a citation form based on the online resource itself. However, this does leave us open to inconsistencies in how these citation forms are structured depending on how different online resources present themselves, and potential issues in the future if the resource is ever cataloged with headings that differ from our citation form.

**Question 3:** Is it acceptable to create citation forms for online resources that do not have a catalog record based on the online resource, rather than first cataloging the resource? Should we require submitters to catalog the resource in question? Is there another solution? There are already a few online resources in the SCF database that do not have a catalog record; see for example [Verzeichnis der Drucke 16. / 17. Jahrhunderts \(VD 16 / VD 17\)](#)

### RISM

We have gotten feedback from both the music cataloging community and the RISM editorial office that our Working Principles resulted in an unacceptable citation form for this resource. It was formerly cited as “RISM,” “RISM A,” or “RISM B.” Following our Working Principles this changed to “International inventory of musical sources,” which the music cataloging community feels is inappropriate, preferring something that still includes “RISM”. We have been investigating possible

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alternatives and are in communication with the music cataloging community to resolve this issue. More on this in the coming months.

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