

Minutes (Draft)
Bibliographic Standards Committee

ALA Annual Meeting

Friday, June 22, 2018, 2:30 - 3:30 pm

Sheraton New Orleans, Southdown

New Orleans, LA



1. Introduction of members and visitors
2. Rare Materials Ontology (Kovari)

1. Introduction of members and visitors

Members present: Francis Lapka, Yale Center for British Art (chair); Amy Brown, Boston College (ex-officio: Controlled Vocabularies editor); Brenna Bychowski, Beinecke Library, Yale University; Kalan Knudson Davis, University of Minnesota; Elizabeth Hobart, Penn State University; Linda Isaac, Houghton Library, Harvard University; Jason Kovari, Cornell University; Deborah J. Leslie, Folger Shakespeare Library; Michelle Mascaro, University of California San Diego; Kate Moriarty, Saint Louis University (secretary); Iris O'Brien, British Library; Amy Tims, American Antiquarian Society (CC:DA liaison).

Visitors: Jeff Barton, Princeton University; Sherman Clarke; Meredith Hale, University of Tennessee, Knoxville; Carl Horne, Indiana University, Bloomington; Bob Kosovsky, New York Public Library; Martha Lawler, Louisiana State University-Shreveport; Jennifer MacDonald, University of Delaware; Honor Moody, Harvard Library; Margaret Nichols, Cornell University; Audrey Pearson, Beinecke Library, Yale University; Karen Stafford, Art Institute of Chicago.

Members absent: Ellen Cordes, Lewis Walpole Library, Yale University; Brian Stearns, University of Alberta.

2. Rare Materials Ontology

Francis Lapka opened the meeting at 2:30 p.m. with a list of meeting objectives: 1) review the scope of the present phase of Linked Data for Production (LD4P); 2) review the areas modeled in the Art and Rare Materials Ontology Extension (ARM); 3) receive an update on the LD4P recommendations to the Library of Congress (LC); 4) learn about the scope of the next phase of LD4P; 5) discuss options for ARM stewardship going forward; 6) develop a BSC response. He then introduced Jason Kovari, a member of LD4P and team lead of its rare materials group.

Kovari led a discussion on whether or not BSC wants to adopt stewardship of ARM and what that would entail. He started with a brief overview of LD4P and ARM (slides can be accessed at: http://bit.ly/bsc2018_arm). ARM is the art and rare materials ontology extension to BIBFRAME developed by the rare materials and art communities during the first phase of LD4P. Together the two communities modeled 22 areas and created four OWL files, a SHACL application for rare monographs,

and the beginnings of a Vitro existence. The next steps are to submit their recommended BIBFRAME changes to LC and document their work for those who will take on ARM stewardship from here. As LD4P's second phase does not include ontology extensions, it is up to communities of practice to assess and possibly adopt and maintain the extensions created in phase one.

Next steps for stewardship of ARM include:

- Assess the models through input from the wider art and rare materials community.
- Identify a transparent development and maintenance process based in continuous community engagement. Possibly similar to that of the MARC Advisory Committee (MAC), with representatives from various communities.
- Refine the current models and develop new ones as needed.
- Identify a hosting solution. Continue to host it in w3id or would contributing to id.loc.gov be preferable? LC informally stated they would support ARM.
- Identify an editing tool. There currently is ARM code for the VitroLib metadata editor.

Reservations about adopting stewardship of ARM primarily revolved around the significant issue of capacity.

- Do we have the numbers needed to take this on in light of our current projects?
- What about ability as BSC members have historically lacked ontology expertise?
 - Apart from the hosting issue, what is involved in continuing the modeling? Kovari briefly outlined the steps taken by the ARM group, observing that the technical expertise need not be represented in BSC: identify the data needed (what you want to query); draw a model; with ontologist expertise, define all of the data; identify terms based on BIBFRAME and other existing ontologies; create OWL files.

The reasons expressed to adopt stewardship of ARM were numerous.

- There are BSC members who were a part of ARM development who can share and apply their knowledge.
- LC recently announced their commitment to replacing MARC with BIBFRAME. Assuming stewardship of ARM would align BSC with the future data format.
- If BSC does not take up this work, the community may not have what it needs to accurately describe art and rare materials in BIBFRAME. Likewise, other communities will likely fill the gap, possibly without BSC input.
- The more engaged we are in this arena, the more we learn and can be equal partners in the development of linked data and BIBFRAME standards and practices related to art and rare materials.
- It was observed that there is overlap between stewardship of ARM and the work on the RBMS Policy Statements to RDA, particularly with RDA's move to a more data dictionary model. This is an opportunity to create an encoding standard that aligns well with RDA.
- As daunting as the work and learning curve look, this work is essential to fulfilling BSC's charge.

Kovari emphasized the benefits of collaboration. Both he and Lapka publicly recognized the subject expertise, time, and work of the Art Libraries Society (ARLIS) in the development of ARM. Additional possible collaborators are the Society of American Archivists, the Getty, LC (a potential partner with the RBMS Controlled Vocabularies Committee), information scientists, and graduate students with

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ontology expertise. It was agreed that collaboration with ontologists and other communities will be essential to taking on this work.

It was decided that the BSC would assume stewardship of ARM for at least two years and seek collaboration. The following statement of intent received a vote of 11 in favor, 0 against, and 0 abstentions: The Rare Books and Manuscripts Section Bibliographic Standards Committee (RBMS BSC) commits to develop and maintain the Art and Rare Materials BIBFRAME Ontology Extension. We will seek collaboration with communities of shared interest, including subject and technical experts. The RBMS BSC will review work and determine continuation in June 2020.

Lapka expressed his gratitude to the ARM group for their impressive work, to which meeting attendees agreed.

It was mentioned that LC is developing a rare materials profile in the context of their BIBFRAME pilot. LC is part of LD4P but is not engaged with ARM. This may be something we can discuss with the BSC-LC liaison at tomorrow's meeting as LC is an important piece of the puzzle.

At the end of the meeting there was discussion of a possible RBMS conference workshop: MARC/cataloging for curators. The request came from a curator and the topic apparently has also been regularly requested as a Rare Book School course. Two BSC members taught similar content in the past for scholars at their institution.

The meeting closed at 2:30 p.m.

Respectfully submitted June 16, 2018 by Kate Moriarty, RBMS Bibliographic Standards Committee secretary.

Minutes (Draft)
Bibliographic Standards Committee

ALA Annual Meeting

Saturday, June 23, 2018, 8:30 - 11:30 am

Sheraton New Orleans, Oak Alley

New Orleans, LA



1. Introduction of members and visitors
2. Settlement of the agenda
3. Approval of 2018 Midwinter minutes
4. Consent agenda
5. Updates from the BSC Chair
6. Experts Directory (Isaac)
7. DCRM(S): Descriptive Cataloging of Rare Materials (Serials) -- Examples (Gillis)
8. DCRM(MSS): Descriptive Cataloging of Rare Materials (Manuscripts) (Nichols)
9. Controlled Vocabularies Editorial Group (Brown)
10. Web Resources for the Rare Materials Cataloger (Ducmanas)
11. BSC-sponsored RBMS conference programs
 - a. 2018 New Orleans
 - i. Workshop: Cataloging Rare Materials Using RDF (Kovari/Isaac/Pearson)
 - ii. Seminar: RBMS Policy Statements (Lapka)
 - b. 2019 Baltimore
 - i. Workshop proposals
 1. CERL Material Evidence in Incunabula (Lapka)
 - ii. Seminar proposals
12. Report of the RBMS liaison to the Committee on Cataloging: Description and Access (CC:DA) (Tims)
13. RBMS Policy Statements (Mascaro)
14. Standard Citation Forms (Myers)
15. Announcements from the floor
16. Acknowledgements
17. Adjournment

Appendix A: Recommendations of the Controlled Vocabularies Editorial Group

Appendix B: RBMS Policy Statements Progress Report

Appendix C: Standard Citation Forms Report

Appendix D: Minutes of the April 4, 2018 BSC virtual meeting

Appendix E: Minutes of the June 13, 2018 BSC virtual meeting

1. Introduction of members and visitors

Members present: Francis Lapka, Yale Center for British Art (chair); Amy Brown, Boston College (ex-officio: Controlled Vocabularies editor); Brenna Bychowski, Beinecke Library, Yale University; Ellen Cordes, Lewis Walpole Library, Yale University; Kalan Knudson Davis, University of Minnesota;

Elizabeth Hobart, Penn State University; Linda Isaac, Houghton Library, Harvard University; 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 present: Cynthia Becht, Loyola Marymount University (Workshops Committee liaison); Elizabeth Call, University of Rochester (RBMS Executive Committee liaison); Kate James, Policy and Standards Division, Library of Congress.

Visitors present: Colleen Barrett, Philadelphia Rare Books & Manuscripts Company; Alison Bridger, Wisconsin Historical Society; Valerie Buck, Brigham Young University; Deb DeGeorge, Library of Congress; Emily Epstein, University of Colorado Health Sciences Library; Matt Ducmanas, Temple University; Jane Gillis, Beinecke Library, Yale; Matthew Haugen, Columbia University; Sarah Hoover, University of North Carolina-Chapel Hill; Katie Kuntz, Davenport Public Library; Martha Lawler, Louisiana State University-Shreveport; Rafael Linares, La Casa del Libro, San Juan. P.R.; Jennifer MacDonald, University of Delaware; Martha McTear, University of California Santa Barbara; Philippe Mongeau, University of Toronto; Honor Moody, Harvard Library; Ann Myers, Stanford University; Arvid Nelsen, Bridwell Library, Southern Methodist University; Margaret Nichols, Cornell University; Phyllis Payne, Boston University; Audrey Pearson, Beinecke Library, Yale University; Melissa Robohn; Stephen Skuce, MIT (retired); Manon Th  roux, Library of Congress; Brittney Washington, Folger Shakespeare Library; Rebecca Wiederhold, Brigham Young University;

Member excused: Jason Kovari, Cornell University.

Elizabeth Call introduced herself as the RBMS Executive Committee (RBMS Exec) liaison and said she is available to pass on any comments or information to RBMS Exec.

2. Settlement of the agenda

Francis Lapka proposed moving agenda item 7 DCRM(MSS) immediately below 12 RBMS Policy Statements since the two discussions are connected. The change was agreed to by DCRM(MSS) editor Margaret Nichols and other attendees.

3. Approval of 2018 Midwinter minutes

The 2018 Midwinter minutes were approved unanimously pending minor corrections submitted to the secretary before the meeting.

4. Consent agenda

No items.

5. Updates from the BSC Chair

Lapka reported on the status of the Art and Rare Materials Ontology Extension (ARM). As of July 1, 2018 ARM will no longer be tied to the Linked Data for Production project (LD4P) so needs a new steward if work on it is to continue. BSC has been reviewing the ARM models for the past six months and at yesterday's meeting voted to continue developing and maintaining the ontology extension in collaboration with other communities. A broad statement of intent was crafted and will be conveyed to the RBMS Executive Committee for feedback. Following revisions, the BSC will vote on the statement via ALA Connect.

6. Experts Directory

Linda Isaac reported that there are no new developments as we are dependent on the Web Team to finish its migration work. There is no timeline but once the migration is finished, it will be possible to move forward with refining the draft submission form and posting it. It was mentioned that the Standard Citation Forms submission form has undergone a few changes which might be of use to the Experts Directory form.

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

Jane Gillis thanked everyone who participated in the spring's close review of the resource's 50+ examples. Through in-person and weekly online meetings the editorial team finished the revisions from the review. What remains are a few more images, the introduction, and the index. The Library of Congress (LC) will supply the shortcut links. This summer the document will be submitted to LC and the Committee on Cataloging: Description and Access for review. It will also be made available again to BSC in case individuals wish to give it a final review. The team asked for feedback on the number of images and were told to use as many as they want. Lapka thanked Gillis, Stephen Skuce, and Annie Copeland for their work and observed that these examples and those in *Examples to Accompany Descriptive Cataloging of Rare Materials (Books)* should likely be revised and repurposed to illustrate application of the RBMS Policy Statements (RBMS PS), after the PS are published.

Gillis also reported that the work on describing manuscript serials continues.

There was a question regarding reporting suggestions or corrections to *Examples to Accompany DCRM(B)* can be sent to Lapka.

9. Controlled Vocabularies Editorial Group

RBMS Controlled Vocabularies Report

Amy Brown reported that in January, the Controlled Vocabularies Editorial Group (CVEG) submitted a survey to the rare materials community in order to become informed on the ways in which the *RBMS Controlled Vocabularies* (RBMS CV) are being used. The results indicate that the most commonly used vocabularies are Library of Congress Genre/Form Terms (LCGFT) (87% of respondents use), RBMS CV (81%), and Art & Architecture Thesaurus (AAT) (69%). When faced with a duplicate term in multiple vocabularies, respondents' first choice of thesaurus is LCGFT (43%), followed by RBMS CV (39%), then AAT (25%). A report on the results of the survey can be accessed at

http://rbms.info/files/committees/bibliographic_standards/conference-docs/CV_Report_Survey_2018a.pdf. The survey was used to develop a CVEG proposal on the scope of the RBMS CV (see “Proposal 1: Scope of work” below). There was a suggestion to repeat the survey periodically as the RBMS CV integration work progresses.

CVEG Recommendations

CVEG put forth three proposals to BSC. See Appendix A for the full document.

Proposal 1: Scope of work

Lapka read the proposal:

The RBMS Controlled Vocabularies maintains terms specific to the needs of the rare materials community. New terms are added at the request of community members and vetted for inclusion by the Controlled Vocabularies Editorial Group. General terms that are already accessible in other major vocabularies will not be added unless a specific, differentiating rare materials definition exists.

Note: This scope applies to the work of the CV after the vote has passed at ALA Annual 2018. It is expected that future vocabulary editors will respect this scope, but understood that as best practices shift the best interest of the community and description of rare materials resources generally is paramount.

Brown explained that new duplicate terms would not be created but current duplicate terms will remain in the RBMS CV. The RBMS CV will be focused on rare-materials terms, however the CVEG would not create new terms that would fit better in another major vocabulary. In the discussion, there was appreciation of the plan to cease creating new duplicate terms. Concern was expressed regarding the decision not to deprecate current duplicate terms, which would continue the need for catalogers to consult multiple thesauri. An issue encountered by CVEG is that many duplicates are broader terms needed for narrower non-duplicate terms. Other feedback included a suggestion to move to LCGFT the RBMS CV genre terms that are not specific to rare materials. In answer to a question regarding the status of the RBMS CV Binding Terms thesaurus (RBMS CV Bindings) vis-à-vis the Language of Bindings Thesaurus, the CVEG is not certain yet if it will continue to develop RBMS CV Bindings. Some responders to the survey expressed that RBMS CV Bindings was easier to use for non-experts. An international perspective was given that, in general, it was easier to point institutions to RBMS CV than to LC.

Lapka read the proposal and a vote was taken to approve it: 12 approved; 0 opposed; 0 abstained.

Proposal 2: New Charge

Lapka read the the proposal:

Proposed: In consultation with the rare materials description community, the Controlled Vocabularies Editorial Group develops and maintains the content of and facilitates access to the RBMS controlled vocabularies.

Current: Under the aegis of the RBMS Bibliographic Standards Committee (BSC), the Controlled Vocabularies Editorial Group is responsible for "Controlled Vocabularies for Use in Rare Book and Special Collections Cataloging." The group will develop and maintain content of and access to the RBMS controlled vocabularies.

Brown pointed out the more high-level changes to the charge: a de-emphasis of the print resource, a recognition that CVEG may not have control of access if, for example, LC hosts the RBMS CV, and a change to "under the aegis" to broaden the scope.

Discussion revealed that there is confusion regarding what "under the aegis of the RBMS Bibliographic Standards Committee" means and the degree of independence that CVEG has. Some BSC members expressed concern with removing the phrase. CVEG reported a lack of clarity surrounding the phrase. Lapka clarified it to mean that BSC would need to vote on or agree to higher-level decisions, such as CVEG's scope and the move to linked data, but that lower-level decisions would be up to CVEG. It was noted that RBMS Exec needs to be involved in changes to committee charges and that the BSC charge is out of date. Updating the charges in tandem with each other was suggested. Lapka stated that we will discuss the issue further over email and vote at a later date.

Proposal 3:

Lapka read the proposal:

Because of the existing technological infrastructure with the RBMS website and its inherent barriers, the Controlled Vocabularies Editorial Group (CVEG) proposes partnering with the Library of Congress' Linked Data Service (LDS) to provide access to the RBMS controlled vocabularies. Notably, the group is still investigating the implementation. Should any of the below project specifications prove invariable or change substantively, the CVEG will reassess before moving forward.

Project specifications:

- CVEG will maintain editorial control of the vocabularies
- CVEG will provide routine data dumps to LC LDS. The frequency of these updates remains to be determined
- Data formats and transformation responsibilities are still in process; tentatively, LC has offered to transform our native XML data (exported from MultiTees, the current database maintenance software) with each update
- LC LDS will provide hosting, including a searchable interface and a linked data service. Concurrently, the existing rbms.info site will cease to exist, avoiding confusion about stable URIs
- Integration and reorganization will continue. Implementation will take place after integration is complete.

Brown explained that hosting and querying the RBMS CV in linked-data form on the current rbms.info site is impossible. We risk getting left behind if we do not find another host and convert our terms to linked data. To that end, CVEG has opened a preliminary conversation with LC, who has been receptive to hosting the RBMS CV for us. CVEG is looking for BSC's level of interest in the possibility of a partnership with LC before directing too much energy in that direction.

The advantages of partnering with LC: the RBMS CV would be in linked-data form. LC has higher visibility and a more robust technological infrastructure which would give the RBMS CV longevity and weight and might facilitate being able to control terms in OCLC. In answer to a question regarding consideration of Open Metadata Registry, CVEG found that the LC site has a better user interface. Disadvantages: rbms.info/vocabularies would cease to exist since we do not have the technology to mirror another site and it is potentially confusing to people for a term to have a URL on one site (rbms.info) and URI on another (id.loc.gov). We would also lose the easy drop-in browse on individual letters and hierarchy browse we currently have. It was pointed out that, if we become a stakeholder in LC LDS, we could push for more viewable hierarchies.

The BSC voted on endorsing CVEG's continuation of the conversation with LC on LC LDS hosting RBMS CV: 11 yes; 0 no; 1 abstention.

Lapka thanked CVEG for their work.

10. Web Resources for the Rare Materials Cataloger

The written report of the Working Group for the Review of Web Resources for the Rare Materials Cataloger can be accessed at:

http://rbms.info/files/committees/bibliographic_standards/conference-docs/Web_Resources_Report_2018a.pdf.

Matt Ducmanas reported that the working group distributed an online survey in March to gather feedback on Web Resources for the Rare Materials Cataloger. Based on responses, it appears that the current scope of the directory is meeting cataloger needs and does not need to be changed. As one-third of respondents had not heard of it, there will be some efforts to increase awareness post-migration. The responses also supported the working group's previous recommendations to update the design and structure in order to better present the content. An outstanding question is whether the directory should exclude general cataloging resources.

Ducmanas then addressed points made at the BSC ALA Midwinter 2018 meeting. Both the working group and survey respondents agree that there should be a search function and the group is exploring how to do this in WordPress. A scope statement to help guide user submissions will be crafted after migration. The working group also supports the suggestion to create a standing committee that could help maintain the directory, evaluate submissions, and conduct outreach efforts to increase the directory's visibility. The group confirmed that the old site will be operational until the migration.

Current work is focused on the structure and design of the directory. Two formats are being considered: a tabbed format and a stand-alone multi-page one similar to [Standard Citation Forms for Rare Materials Cataloging](#), which has some support. Lapka requested that the working group begin designing the directory in WordPress, migrate some content, and share it with BSC prior to a virtual meeting in the fall dedicated to this topic.

11. BSC-sponsored RBMS conference programs

a. 2018 New Orleans

i. Workshop: [Cataloging Rare Materials Using RDF: The Rare Materials Ontology Extension](#)

Audrey Pearson reported that twenty-three participants attended the workshop presented by Jason Kovari, Linda Isaac, and Pearson. A brief glance at the evaluations determined they were positive. Meeting attendees who were at the workshop also gave positive reviews. Pearson thanked the Beinecke Library for providing the support to do a preview workshop and the Beinecke attendees for their valuable feedback.

ii. Seminar: [From DCRM Manuals to RBMS Policy Statements](#)

Lapka moderated this seminar attended by 110 people. The panelists were Deborah J. Leslie, Michelle Mascaro, and Audrey Pearson. Lapka reported that it was a challenge since the revision of RDA was expected to be much further along but it appeared to be helpful, especially to those who had not followed BSC discussions closely.

b. 2019 Baltimore

i. Workshop proposals

1. CERL Material Evidence in Incunabula

Lapka asked for feedback on the proposal circulated prior to the meeting. It was solicited following discussion at Midwinter with the possibility of BSC being a co-sponsor. Both interest in the workshop and BSC co-sponsorship and hesitation at co-sponsoring a session over which BSC has little involvement in the content were expressed.

Other workshop ideas discussed:

- An introduction to MARC for curators/non-catalogers
- Cataloging materials that cross formats

The Workshops Committee liaison mentioned that they are always interested in proposals from BSC and try to make space for BSC workshops as often as possible. Based on the success of the Midwinter 2018 DCRM(MSS) workshop, they are hoping to start regularly offering workshops at Midwinter meetings.

Due to time constraints, the rest of the discussion will take place over email in time to submit a BSC proposal by the August deadline.

ii. Seminar proposals

- Cataloging volumes that have been extra-illustrated with a variety of media. This may substitute for the workshop suggestion above, Cataloging materials that cross formats.
- A second seminar on the RBMS PS since things are changing so quickly

12. Report of the RBMS liaison to the Committee on Cataloging: Description and Access (CC:DA)

Amy Tims reported that CC:DA has been discussing its role in RDA development in light of the RDA Steering Committee's new governance configuration, and as a resource to communities following RDA's move to a data dictionary model with the subsequent expectation of community-developed application profiles and policy statements. As BSC is participating in policy statement and ontology development, this may be an opportunity for RBMS to actively contribute to CC:DA initiatives. CC:DA meets Saturday and Monday at ALA but the Monday meeting was cancelled in lieu of a discussion on the impact of RDA changes on MARC 21 development.

Lapka announced that Amy Tims is rotating off as CC:DA liaison and thanked her for her service. Honor Moody will be the new CC:DA liaison.

13. RBMS Policy Statements

Michelle Mascaro's written progress report can be found in Appendix B. Since submission of the report, there has been one RBMS PS virtual meeting regarding the remaining questions recently posted to DCRM-L. The minutes of that meeting can be found in Appendix E and Mascaro will be summarizing outcomes in the corresponding Google documents.

Mascaro reported that the changes to the RDA Toolkit were more significant than anticipated. Now that everything is optional there will be a heavy reliance on policy statements, making the RBMS PS work all the more imperative. Mascaro presented a plan for the work going forward.

1. Suspend work on the RBMS PS until the September Toolkit release so that we know our decisions will align with RDA.
2. During that time, form a subgroup of 5-6 people who will be in charge of revising the RBMS PS. Prior to the September release, the members would familiarize themselves with the Toolkit and the current RBMS PS. Mascaro will be putting out an open call for members.
3. Do an initial release of the books and serials formats while continuing to work with communities on finishing the cartographics, graphics, and music formats. [N.B. Based on additional information presented at CC:DA regarding further work needed on serial guidelines in the new RDA toolkit, RBMS PS for serials may also not be part of the initial release.]
4. As part of the review process, release a gamma version of the RBMS PS within the Toolkit for public comment.

Mascaro opened the floor for discussion. There was positive feedback on the first and third proposals. In answer to a question regarding the second proposal, Mascaro explained that the reason for forming a

subgroup is to have a core group of people who commit to responding to RBMS PS issues. There was both support for and concern about the fourth proposal, to release the draft RBMS PS within the Toolkit for public review. The advantages include the ability to assess both the content and the functionality of the RBMS PS in context. The disadvantage is that users may confuse the gamma RBMS PS version for the final version. The logistics/feasibility of releasing a gamma version will also need to be discussed with ALA Publishing.

There was a question on whether the glossary group should continue work on the books and serials formats. Mascaro suggested a pause on the group's activities but offered to talk with them further.

The project's timeline will need to be revised. It may not be possible to have the updated RBMS PS ready in time for a fall BSC virtual meeting. The Midwinter 2019 public hearing may also need to be pushed back.

8. DCRM(MSS): Descriptive Cataloging of Rare Materials (Manuscripts)

The discussion on AMREMM and DCRM(MSS) was tabled; the topic will be discussed in a BSC virtual meeting in the fall.

14. Standard Citation Forms

Ann Myers's written report can be found in Appendix C. Myers reported that since Midwinter, the Standard Citation Forms (SCF) editorial team has welcomed two new members: Martha Lawler and Jessie Sherwood. The team created 42 new citation forms in that time (announced on the DCRM-L list) and site usage remains steady. The SCF team is working with the Web Team to streamline its workflow through the use of a new submission form. As there will be slight changes to the public submission form, it will be sent to BSC members to test once ready. Myers thanked Kelli Hansen for the tremendous work she has done for SCF. The team also worked closely with the music cataloging community and the international office of Répertoire International des Sources Musicales (RISM) to update the RISM citation. The change in citation form was announced on DCRM-L and added to the SCF [conversion spreadsheet](#). Myers thanked Jane Carpenter and Kate Moriarty for their work on the citation.

There was an observation that citation forms are based on OCLC records and that an AACR2 and RDA OCLC record can result in different citation forms, possibly prompting a citation change request in the future. Changing an AACR2 OCLC record to an RDA one prior to submitting a citation form request eliminates the problem. The question was asked, how set-in-stone are the citation forms? Myers replied that though the ideal is to create a citation form based on a resource in hand, often SCF editorial team members do not have access to the various works for which proposals are submitted. Thus, the SCF [working principles](#) guide submitters and team members to OCLC records as the best alternative. If an OCLC record gets updated in a way that no longer matches the citation form in the SCF database, and if brought to the attention of the SCF team, the team would revisit the citation form. However, the hope is to not be in an iterative process for too many citation forms.

15. Announcements from the floor

Announcements were made on job openings for a rare book cataloger at the Houghton Library, Harvard, and this year's Nadia Sophie Seiler Rare Materials Residency at the Folger Shakespeare Library. There was also a reminder of the RBMS Technical Services Discussion Group meeting, Sunday June 24 at 10 :30 a.m. Topics were generated from the BSC Midwinter 2018 meeting. Lapka announced that there will be virtual BSC meetings between now and Midwinter 2019.

16. Acknowledgements

Lapka thanked Amy Tims for her service as CC:DA liaison and outgoing BSC member, Ellen Cordes. He announced two renewing members, Jason Kovari and Kate Moriarty, and four incoming members: Katelyn Borbely, Amy Brown, Alison Greenlee, and Honor Moody.

17. Adjournment

Lapka adjourned the meeting at 11:30 a.m.

Respectfully submitted June 16, 2018 by Kate Moriarty, RBMS Bibliographic Standards Committee secretary.

Appendix A

Recommendations (for consideration at ALA Annual 2018)

Proposal 1: Scope of work

The RBMS Controlled Vocabularies maintains terms specific to the needs of the rare materials community. New terms are added at the request of community members and vetted for inclusion by the Controlled Vocabularies Editorial Group. General terms that are already accessible in other major vocabularies will not be added unless a specific, differentiating rare materials definition exists.

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Proposal 2: New charge

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Current:

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Proposal 3: Linked Open Data

Because of the existing technological infrastructure with the RBMS website and its inherent barriers, the Controlled Vocabularies Editorial Group (CVEG) proposes partnering with the Library of Congress' Linked Data Service (LDS) to provide access to the RBMS controlled vocabularies. Notably, the group is still investigating the implementation. Should any of the below project specifications prove infeasible or change substantively, the CVEG will reassess before moving forward.

Project specifications:

- CVEG will maintain editorial control of the vocabularies
- CVEG will provide routine data dumps to LC LDS. The frequency of these updates remains to be determined
- Data formats and transformation responsibilities are still in process; tentatively, LC has offered to transform our native XML data (exported from MultiTes, the current database maintenance software) with each update

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- LC LDS will provide hosting, including a searchable interface and a linked data service. Concurrently, the existing rbms.info site will cease to exist, avoiding confusion about stable URIs
- Integration and reorganization will continue. Implementation will take place after integration is complete.

Appendix B

RBMS Policy Statements Progress Report to the RBMS Bibliographic Standards Committee for ALA Annual 2018 (New Orleans)

Progress since Midwinter

The RBMS Policy Statement (RBMS PS) Editor set the following goals to be complete between Midwinter and ALA Annual 2018:

Hold Two Virtual Meetings to Continue Discussion of RBMS PS

The first virtual meeting was held on April 4 and attended by 35 people (including guests). The focus of the meeting was an overview of the project and its current status and some discussion on the future relationship between the LC-PCC Policy Statements and the BIBCO Standard Record (BSR) and CONSER Standard Record (CSR) and the RBMS PS. Complete minutes of the meeting will be attached to the BSC ALA Annual Minutes as an appendix.

The second virtual meeting was originally scheduled May 30, but delayed until June 13 due to personal illness. The meeting will discuss the outcomes to the review questions posted to DCRM-L between Nov. and May. Minutes will be made available.

Post Remaining Initial Discussion Questions to DCRM-L

The last remaining discussion questions (regarding extent) were posted to DCRM-L in April/May. We had a lively discussion on DCRM-L regarding using square brackets to denote unnumbered pages as well as the use of Latin abbreviations i.e. and sic (versus spelling them out in the language of the cataloging agency), in transcriptions in general.

A complete summary of all the DCRM-L discussion questions is publicly available on [Google Drive](#). The BSC will discuss proposed outcomes at their upcoming virtual meeting on June 13th.

Complete Outstanding Graphics Sections

Ellen Cordes and Liz O'Keefe submitted recommendations on how to resolve the outstanding issues related to Graphics instructions in early April. Michelle Mascaro made an initial pass at drafting appropriate RBMS PS. These recommendations are being currently being wordsmithed by Francis Lapka, Ms. Mascaro, and Amy Tims and should be complete slightly before RBMS.

Form a Task Group to Work on the RBMS PS Glossary

Valerie Buck, Kalan Davis, and Sarah Hoover were appointed to finish the work of comparing glossary definitions between RDA and DCRM modules and identify other terms that need to be added to the glossary. They have made significant progress and will continue.

Finish Identifying Examples for the RBMS PS

The DCRM Task Force Examples Group (Ellen Cordes, Lori Dekydsporter, Linda Issac, Iris O'Brien, and Catherine Uecker) continues its work on sleuthing out examples for sections of RDA. There remain

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approximately 25 sections to be reviewed with 13 additional areas that have been referred to format specific specialists.

Draft Game Plan for Tackling Post 3R Revisions

Following the beta release of the revised Toolkit on June 13, the editor will begin to assess what/how much revision is needed to the current RBMS PS drafts to be 3R compliant. This is will be a discussion item at BSC's meeting at ALA Annual.

Next Steps

- Make necessary revisions to the drafts to be in line with 3R.
- Draft RBMS PS for relationship chapters
- Hold a public hearing at ALA Midwinter
- Conduct a close reading of the drafts

An updated version of the project timeline shared during the April 3, BSC virtual meeting is attached.

Respectfully submitted by Michelle Mascaro, RBMS PS editor, June 7, 2018

Timeline: RBMS PS Work By Date

(updated June 7, 2018)

Between now and Annual 2018

- Week of March 26 resume discussion questions on DCRM-L with extent (task completed)
- April 2 Ellen and Liz complete drafts of outstanding Graphics section (task completed)
- April 4 Hold first RBMS PS virtual meeting (task completed)
- Mid-April Form small group to draft glossary definitions (task completed)
- Week May 14 or 21: Hold second RBMS PS virtual meeting (meeting delayed due to illness, rescheduled for June 13)
- June 1
 - Wordsmithing team completes review of Graphics sections (delayed: Wordsmithing will wrap prior to annual)
- Annual 2018
 - Complete draft of glossary definitions (in progress, will continue post annual)
 - Goal examples finished (in progress, will continue post annual)
 - Draft game plan for tackling 3R revisions (assuming the 3R June 13 reveal is achieved)

Other ongoing activities: soliciting feedback on remaining review questions

Between Annual 2018 and Midwinter 2019

- Post 3R launch (July 2018)
 - Commence drafting of RBMS PS for relationship chapters
 - Start work on any necessary 3R revisions to the RBMS PS
 - September 2018 RBMS PS for relationship chapters complete (tent.)
- Post RSC meeting (October 2018?) Flesh out completion timeline for RBMS PS based on RDA publishing schedule
- Thanksgiving 2018 RBMS PS fully revised according to 3R (tent.)
- December 2018 Release draft PS for public comment/closing reading
- Midwinter 2019 Hold public hearing on RBMS PS

Between Midwinter 2019 and Annual 2019

- February 2019 Close reading/public comment closes
- Spring 2019 Revise RBMS PS based on feedback

? enter PS in Toolkit

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Appendix C

Standard Citation Forms Report for Bibliographic Standards Committee Annual 2018

New members

Since Midwinter we have welcomed two new members, Martha Lawler and Jessie Sherwood.

Statistics

The SCF Editorial Team has created 42 new citation forms based on submitted proposals since Midwinter. 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 1217 sessions and 505 users per month, which is comparable to earlier periods.

Workflow Improvements

We have been testing a new submission form for citation form proposals that will hopefully streamline some of our back-end processes. We will make further announcements when the new form is ready to go live. Many thanks to Kelli Hansen for working with us on this project!

RISM

After consultation with the music cataloging community and the RISM editorial office, we have settled upon a new citation form for RISM. The citation has changed from International inventory of musical sources to RISM (Répertoire international des sources musicales). This will apply to both the print and online versions of RISM; the distinction between them will be made in the \$c, as the print version will include series and volume (i.e. Series B, volume III, page 87) while the online version will simply be a numerical string. Thanks to Jane Carpenter and Kate Moriarty for leading the work on making this change.

Submitted by the Standard Citation Forms Editorial Team:

Valerie Buck
Jane Carpenter
Ellen Cordes (Advisory Member)
Emily Epstein
Martha Lawler
Kate Moriarty
Ann Myers (Editor)
Jessie Sherwood

Appendix D

Minutes (Draft)

Bibliographic Standards Committee

Virtual Meeting: RBMS Policy Statements

Zoom, Wednesday, April 4, 2018

8:00 - 9:00 am PDT



1. Introduction (what are the RBMS PS) and project status
2. Proposed timeline for completion/next steps
3. Discussion item: Relationship of RBMS PS to LC-PCC PS and BIBCO Standard Record (BSR) and CONSER Standard Record (CSR)
4. Summary of DCRM-L discussion questions (Time permitting)

Members present: Francis Lapka, Yale Center for British Art (chair); Amy Brown, Boston College (ex-officio: Controlled Vocabularies editor); Brenna Bychowski, Beinecke Library, Yale University; Ellen Cordes, Lewis Walpole Library, Yale University; Kalan Knudson Davis, University of Minnesota; Elizabeth Hobart, Penn State University; Linda Isaac, Harvard University, Houghton Library; Michelle Mascaro, University of California San Diego; Kate Moriarty, Saint Louis University (secretary); Iris O'Brien, British Library; Amy Tims, American Antiquarian Society (CC:DA liaison).

Visitors: Liz Adams, Duke University; Jeff Barton, Princeton University; Erin Blake, Folger Shakespeare Library; Katelyn Borbely, ProQuest; Whitney Buccicone, University of Washington; Adelaida Caro, National Library of Spain; Adriana Celmare, Princeton University; Deanna Chavez, Library of Virginia; Stephanie Fell, Duke University; Todd Fell, Beinecke Library, Yale University; Alison Greenlee, Wayne State University; Matthew Haugen, Columbia University; Paul Hessling, University of North Carolina-Greensboro; Sarah Hoover, University of North Carolina-Chapel Hill; Anna Loewenthal, Folger Shakespeare Library; Danijela Matkovic, Beinecke Library, Yale University; Kathleen Medicus, Kent State University; Honor Moody, Harvard Library; Maria Oldal, Morgan Library & Museum; Audrey Pearson, Beinecke Library, Yale University; Melissa Robohn; Christopher Smith, Beinecke Library, Yale University; Stephen Young, Beinecke Library, Yale University; Brittney Washington, Folger Shakespeare Library.

Members absent: Jason Kovari, Cornell University; Deborah J. Leslie, Folger Shakespeare Library; Brian Stearns, University of Alberta.

1. Introduction (what are the RBMS PS) and project status

Francis Lapka started the meeting at 8 a.m. and went over a few housekeeping details, including that comments are welcome from all attendees and that the recording from this meeting will be made publicly available. He reviewed a few of the acronyms that will come up in the discussion: RDA = *Resource Description and Access*; DCRM = Descriptive Cataloging of Rare Materials, or, the six AACR2-based manuals published by the RBMS Bibliographic Standards Committee (BSC); RBMS PS = RBMS's policy statements for RDA, currently under development; BSR = BIBCO Standard Record RDA

Metadata Application Profile; CSR = CONSER Standard Record RDA Metadata Application Profile. Lapka thanked those who participated in the recent close reading of *Examples to Accompany Descriptive Cataloging of Rare Materials (Serials)* and announced the upcoming 2018 RBMS Conference seminar, [From DCRM Manuals to RBMS Policy Statements](#), and that another virtual BSC meeting will take place in May. He then introduced RBMS Policy Statements Editor Michelle Mascaro, who led the rest of the meeting.

Mascaro gave the following context and history of the RBMS Policy Statements.

- **Oct. 2012** The DCRM-RDA Task Force issues their final report, recommending the creation of a *DCRM(B)* that is RDA-compatible.
- **Jan. 2013** The DCRM(B) for RDA Revision Group is formed.
- **June 2013** Change of approach: decision to create a consolidated DCRM based on RDA.
- **June 2014** Decision to, instead of creating a standalone DCRM for RDA, create a series of policy statements to RDA, consisting of rules for rare materials cataloging only where deviation from RDA is necessary or where RDA requires elaboration.
- **Fall 2014** The DCRM Task Force (DCRM TF) is formally formed. This is the group that did the bulk of the RBMS PS writing.
- **Nov. 2015** The Joint Steering Committee for Development of RDA (JSC) invites the DCRM TF to their annual meeting in Edinburgh to discuss rare materials. In conjunction with the Edinburgh JSC meeting, DCRM Task Force members co-present at the “RDA & Rare Materials Seminar.”
- **2016** The RDA Steering Committee Rare Materials Working Group, an international group specific to revising RDA proper and evaluating its examples, is formed as a result of the JSC Nov. 2015 Edinburgh meeting. There is overlap between this group and the DCRM TF but members are careful to keep their work separate.
- **2016** The DCRM Task force formally names the guidelines the RBMS Policy Statements (RBMS PS), in alignment with the naming conventions of other RDA policy statements.
- **2017** The RDA Toolkit content is frozen as part of the 3R Design. Unable to finish the RBMS PS until the new RDA is released.
- **June 2017** The DCRM Task Force completes its charge of creating an initial draft of the RBMS PS; final work of shepherding the RBMS PS to publication is absorbed by the RBMS Bibliographic Standards Committee (BSC). Some members of the DCRM TF continue to be involved.
- **Fall 2017** Initial community review begins via a series of questions on DCRM-L.

[N.B. The recording of the meeting was corrupted and will not be available].

2. Proposed timeline for completion/next steps

Mascaro had sent two timeline documents in advance of the meeting: Timeline by Date (see Appendix A) and Timeline by Task (see Appendix B). Mascaro reported that the 3R project and the freezing of the RDA Toolkit continue to be a challenge but that we want to move forward as much as possible before the June release of the new Toolkit. The goal is to finish the RBMS PS in two years (June 2017-June 2019), which coincides with the end of Mascaro's appointed editorship.

Broad RBMS PS questions: Discussion of the remaining broad questions has resumed on DCRM-L.

Graphics: Ellen Cordes reported that she and Lapka had directed eight questions to the DCRM(Graphics) editors to resolve outstanding issues. Cordes and Liz O'Keefe recently finished analyzing the responses and uploaded a draft of their recommendations to the shared DCRM-RDA Google Drive folder. Mascaro thanked Cordes and O'Keefe for their work.

Glossary definitions: Valerie Buck had made a first pass at the glossary, comparing definitions between DCRM modules and RDA. Mascaro issued a call for three to four volunteers to form an editorial group that would make the final recommendations on definitions by Annual. Lapka and Mascaro emphasized that volunteers do not have to have been a member of the DCRM TF or be a BSC member. It can be a good opportunity to explore and express interest in the RBMS PS and BSC. Those interested should email Mascaro.

Goals by ALA Annual 2018: Finish the glossary, examples, and a draft plan on how to tackle 3R revisions.

Between ALA Annual 2018 and Midwinter 2019: Immediately following the release of the new Toolkit, any necessary 3R revisions to the RBMS PS will be made and work will begin on the RBMS PS for relationship chapters - the largest outstanding portion of the RBMS PS. Though at the last BSC meeting a preference was expressed to hold a public hearing at an ALA annual meeting, in order to stick with the timeline, the hearing will need to take place at the ALA Midwinter 2019 meeting. Lapka added that there may be a series of virtual public hearing-like meetings to accommodate those who cannot attend Midwinter 2019.

Between ALA Midwinter 2019 and Annual 2019: A close reading of the RBMS PS - similar to that for *Examples to Accompany Descriptive Cataloging of Rare Materials (Serials)* - will take place followed by revision based on feedback and additional public comment as warranted.

3. Discussion item: Relationship of RBMS PS to LC-PCC PS and BIBCO Standard Record (BSR) and CONSER Standard Record (CSR)

The current drafts of the RBMS PS do not assume application of LC-PCC PS. When the same outcome as the LC-PCC PS is desired, the RBMS PS either provide similar instruction or, in situations in which the RBMS PS will always follow the LC-PCC PS (such as with encoding issues), reference the LC-PCC PS. This saves us the work of monitoring LC-PCC PS changes.

The current BSR and CSR include rare-materials cataloging provisions that serve as a cheat sheet for creating hybrid DCRM/RDA records. Lapka and Mascaro started discussion with PCC about whether to maintain rare material cataloging provisions within the BSR and CSR proper once the RBMS PS are complete. At this point, the PCC Standing Committee on Standards would like to keep options open and not make any final decisions until seeing the completed RBMS PS.

Mascaro asked attendees for thoughts on the relationship between the RBMS PS and the BSR and CSR. Once the RBMS PS are published, retaining rare-materials provisions in the BSR/CSR would require the BSC to both maintain the RBMS PS and coordinate any changes to the RBMS PS provisions in the BSR/CSR with the PCC. A concern raised with removing the RBMS PS, is the low publicity regarding RDA's 2016 decision to allow application of instructions for early printed resources to any material that requires more detailed description (see RDA 1.12). Without that knowledge and RBMS PS instructions in the BSR/CSR, a metadata specialist might not apply RBMS PS to 19th-century material that might warrant it. Since the cheat-sheet nature of the BSR/CSR is so helpful, there was a suggestion, in the event that the RBMS PS are removed, to create something similar, possibly a workflow in the RDA Toolkit. To accommodate institutions without access to the Toolkit, we might also consider creating a freely accessible cheat sheet.

Three straw polls were taken via the meeting attendance sheet; both BSC members and visitors participated.

1. Currently the draft of RBMS PS says RBMS PS do not assume additional application of LC-PCC PS as a default. That means you apply LC-PCC PS only when RBMS PS echo or refer to them. Do you agree with that approach?
 - a. Straw poll result: 28 yes; 2 undecided/conflicted; 5 abstentions.
2. Currently the BSR and CSR includes instructions for the treatment of rare materials largely based on DCRM. Going forward, do we continue to include RBMS PS provisions in the BSR and CSR?
 - a. Straw poll result: 9 yes; 10 no; 10 undecided/conflicted; 7 abstentions.
3. Lapka asked for thoughts on rare-materials instruction in the BSR/CSR that are based on LC-PCC PS, not the RBMS PS.
 - a. Straw poll result: There were 17 responses, 18 abstentions. Most of the responses urged consistent guidance (i.e., do not add LC-PCC PS rare-materials instructions to the BSR/CSR) and noted the potential for confusion if there were two sets of guidelines. A few expressed the opinion that it is up to LC and PCC libraries and that, as RDA currently has guidelines on early printed resources, different instructions already exist.

4. Summary of DCRM-L discussion questions (Time permitting)

We did not have time to discuss this item but a compilation and summary of DCRM-L discussion questions can be accessed at: [RBMS PS Review Google Drive Folder](#). Mascaro will send the link to DCRM-L and encouraged everyone to review the documents and continue engagement on DCRM-L.

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Both she and Lapka reiterated the value of feedback from those who did not serve on the DCRM Task Force.

The meeting closed at 9 a.m.

Respectfully submitted April 19, 2018 by Kate Moriarty, RBMS Bibliographic Standards Committee secretary.

Appendix E

Minutes (Draft)

Bibliographic Standards Committee

Virtual Meeting: RBMS Policy Statements

Zoom, Wednesday, June 13, 2018

9:00 - 10:00 am PDT



1. Introductions
2. Project updates since last virtual meeting
3. Discussion of DCRM-L questions
 - a. Q1 Core Elements
 - b. Q2 Transcription
 - i. Transcription of “VV”
 - ii. Nonnormalized transcription
 - iii. Transcription of inaccuracies (including use of sic and i.e., see Q4 discussion)
 - c. Q3 Sources of information
 - d. Q4 Extent of text
 - i. Use of square brackets to denote unnumbered pages/leaves
 - ii. Recording individual pagination of individual volumes of multi-volume works
 - iii. Recording unnumbered plates

Members present: Francis Lapka, Yale Center for British Art (chair); Amy Brown, Burns Library, Boston College (ex-officio: Controlled Vocabularies editor); Brenna Bychowski, Beinecke Library, Yale University; Ellen Cordes, Lewis Walpole Library, Yale University; Kalan Knudson Davis, University of Minnesota; Elizabeth Hobart, Penn State University; Linda Isaac, Houghton Library, Harvard University; Deborah J. Leslie, Folger Shakespeare Library; Michelle Mascaro, University of California San Diego; Kate Moriarty, Saint Louis University (secretary); Iris O’Brien, British Library; Amy Tims, American Antiquarian Society (CC:DA liaison).

Visitors: Daniel Axmacher, Boston Athanaeum, Jeff Barton, Princeton University; Erin Blake, Folger Shakespeare Library; Whitney Buccicone, University of Washington; Adriana Celmare, Princeton University; Abigail Connick; Alison Greenlee, Wayne State University; Sarah Hamerman; Matthew Haugen, Columbia University; Sarah Hoover, University of North Carolina-Chapel Hill; Sarah Hovde, Folger Shakespeare Library; Anna Loewenthal, Folger Shakespeare Library; Audrey Pearson, Beinecke Library, Yale University; Felicia Piscitelli, Texas A&M University; Arielle Rambo, Library Company of Philadelphia; Melissa Robohn, Noah Sheola, Burns Library, Boston College; Graham Skinner, Boston Athanaeum; Brittney Washington, Folger Shakespeare Library; Anna Sophia Zingarelli-Sweet, California State University, Northridge.

Members absent: Jason Kovari, Cornell University; Brian Stearns, University of Alberta.

1. Introductions

Francis Lapka opened the meeting at 9 a.m. with a brief overview of the RBMS Policy Statements (RBMS PS), which are guidelines for cataloging rare materials in a variety of formats, using RDA. The RBMS PS will replace the AACR2-based Descriptive Cataloging of Rare Materials (DCRM) modules. Lapka then turned the meeting over to RBMS Policy Statements Editor Michelle Mascaro.

2. Project updates since last virtual meeting

A [full report](#) of recent activity has been appended to the BSC ALA Annual 2018 meeting agenda.

Highlights include:

- Formation of the glossary group: Valerie Buck, Kalan Davis, and Sarah Hoover were appointed and have made significant progress.
- Outstanding issues for graphic material: Mascaro thanked Elizabeth O’Keefe and Ellen Cordes for their review of and recommendations on outstanding issues. The wordsmithing group (Mascaro, Lapka, and Amy Tims) made their initial pass and are discussing a few issues with graphic experts.
- 3R release and next steps: The RDA Restructure and Redesign Project (3R) beta release is tomorrow. No one has seen the draft so the first step is to review the new Toolkit to determine needed RBMS PS changes.

3. Discussion of DCRM-L questions

A series of discussion questions were posted to DCRM-L to solicit community feedback on areas where the RBMS PS differ from RDA. Summaries, proposed resolutions, and next steps were posted prior to today’s meeting for discussion and final determination.

3.a. DCRM-L Question 1: Core Elements

This question, which elements should be core, branched into two threads.

Thread #1: Should provenance be a core element? Based on DCRM-L discussion, Mascaro proposed that provenance and other item elements should not be core. Meeting discussion and a straw poll revealed most people were in agreement.

Straw poll statement: Item-specific elements should be core.

Straw poll result: Yes: 0; No: 24; Abstain: 8.

Thread #2: Definition of core; DCRM-L feedback on the RBMS PS proposed list of core elements. Mascaro proposed 1) adding language to 0.6 clarifying the different ways core elements are treated in the RBMS PS and the level of core treatment that applies to different elements; 2) correcting and clarifying when only the first instance of an element is required; and 3) following up with DCRM(Serials) editors and other stakeholders on applicable DCRM-L feedback. There was no disagreement.

As RDA will no longer have core elements it will be up to individual communities to identify what is core. This work will commence after the 3R release.

3.b. DCRM-L Question 2: Transcription

3.b.i. Transcription of “VV”

Due to a lack of non-letterpress examples to the contrary, the RBMS PS will continue to instruct treating “VV” as any other approximate character and transcribe as “W.”

3.b.ii. Nonnormalized transcription

The default transcription approach in the RBMS PS is to normalize transcription but provides an alternative for nonnormalized transcription of punctuation and capitalization. BSC discussion at ALA Midwinter 2018 revealed that in applying the alternative, institutions want to faithfully transcribe punctuation but not capitalization. Following a review of the 3R transcription guidelines, the RBMS PS alternative will be revised to primarily address punctuation transcription.

3.b.iii. Transcription of inaccuracies

RDA’s guideline is to transcribe inaccuracies and place corrections in a note, if considered important. The RBMS PS follows RDA and offers an alternative to correct the inaccuracy within the element. The discussion addressed whether we have a rare materials reason to deviate from RDA and make the in-element correction the RBMS PS default rather than an alternative. Points against in-element corrections included: placing corrections in a note may be less confusing to users; interpolations can cause difficulties in digital asset management systems. Points in favor of in-element corrections: rare materials have a higher frequency of inaccuracies; in a linked-data world we are no longer dealing with records but elements so a correction in a note would not necessarily be harvested along with the element carrying the inaccuracy; with 3R, RDA is introducing the addition of manifestation statements, which are rigorous transcribe-only elements, potentially loosening other transcription elements to a combination of transcription and recording.

A straw poll was taken: For the correction of inaccuracies in transcription, should the default instruction be to correct the inaccuracy (A) within the element or (B) in a note or access point?

Straw poll result: A: 23; B: 2; Unsure: 2 Abstain: 5.

3c. DCRM-L Question 3: Sources of information

The RBMS PS differs from RDA 2.2 in its order of sources of information. For the most part, the DCRM-L discussion agreed with the RBMS PS. There was no additional discussion at this meeting. No changes will be made to the RBMS PS.

3d. DCRM-L Question 4: Extent of text

3d1. Use of square brackets to denote unnumbered pages/leaves

The RBMS PS continues the default DCRM convention to use square brackets for unnumbered pages/leaves (as opposed to RDA's guideline to spell out "unnumbered pages") because, since all pages must be accounted for, extent statements can get complicated. The vast majority of DCRM-L respondents preferred the continued use of square brackets but there were minority opinions. Discussion at this meeting included accessibility issues: some screen readers ignore the square brackets but voice the content of the brackets, thereby giving the impression that they are numbered pages. Square brackets are also removed in some institutions' digital assets management software.

A two-part straw poll was taken on a proposal to use square brackets with the option to follow RDA for short extent statements.

1. Should there be an option to permit institutions to opt to either use square brackets or spell out 'unnumbered pages'?
 - a. Straw poll result: Yes: 17; No: 8; Abstain: 7.
2. Should the RBMS PS default be to (A) use square brackets or (B) spell out 'unnumbered pages'?
 - a. Straw poll result: A: 18; B: 4; Abstain: 10.

3d2. Recording pagination of individual volumes of multi-volume works

Discussion on DCRM-L and during this meeting was limited. Most respondents were of the opinion that recording pagination of individual volumes of multi-volume works should be treated as "if considered important." However, it was pointed out that recording pagination is important for security reasons, particularly when plates are present. It was decided that the RBMS PS will remain as is: recording pagination of individual volumes of multi-volume works is not mandatory but institutions have the option to do so.

3d3. Recording unnumbered plates

The RBMS PS carried over a provision from DCRB and DCRM that if there is a combination of unnumbered pages and leaves of plates, the cataloger records the number either as pages or leaves. Should the RBMS PS instead instruct to record both unnumbered pages and unnumbered leaves of plates when both are present? There was limited DCRM-L and meeting discussion so the RBMS PS will remain unchanged: no differentiation between unnumbered pages and unnumbered leaves of plates.

Lapka closed the meeting by recommending BSC members review the beta version of the new RDA Toolkit and reminded those going to the RBMS 2018 Conference that there will be a seminar on the RBMS PS and that there will be two BSC meetings at the ALA 2018 Annual Meeting. He thanked Mascaro for leading the meeting and Kate Moriarty for taking minutes.

The meeting closed at 10 a.m.

Respectfully submitted June 16, 2018 by Kate Moriarty, RBMS Bibliographic Standards Committee secretary.