

Minutes (Draft)
Bibliographic Standards Committee

ALA Annual Meeting

Saturday, June 22, 2019, 8:30 AM - 11:30 AM

Washington Hilton, Room Columbia 9 & 10

Washington, DC



Agenda

1. Introduction of members and visitors
2. Settlement of the agenda
3. Approval of BSC meeting minutes
4. Consent agenda
5. Updates from the BSC Chair
6. BSC Program Planning Group (Bychowski)
7. Art & Rare Materials BIBFRAME Ontology Extension (Kovari)
8. LD4P2: Rare Materials Affinity Group (Pearson / Washington)
9. *Examples to Accompany Descriptive Cataloging of Rare Materials (Serials)* (Copeland / Gillis)
- 9a. Manufacturing information and *Descriptive Cataloging of Rare Materials (Books)* (Leslie)
10. Report of the RBMS Liaison to the Committee on Cataloging: Description and Access (CC:DA) (Moody)
11. RBMS Policy Statements Editorial Group (Mascaro)
12. *Descriptive Cataloging of Rare Materials (Manuscripts)* and *Descriptive Cataloging of Ancient, Medieval, Renaissance, and Early Modern Manuscripts* (AMREMM) (MacDonald)
13. Announcements from the floor
14. Acknowledgements
15. Adjournment

Appendix A: RBMS 2020 Session Proposals

Appendix B: Discussion of Next Steps for the RBMS Policy Statements to RDA

Appendix C: AMREMM/DCRM(MSS) Review Group

Appendix D: BSC Minutes 2019-05-01

[Draft agenda](#) (information from the draft agenda is incorporated into the notes below)

The chair opened the Bibliographic Standards Committee (BSC) meeting at 8:30 a.m. This was the BSC's first hybrid meeting, with virtual attendees participating via Zoom.

1. Introduction of members and visitors

Members present

Francis Lapka, Yale Center for British Art (chair); Katelyn Borbely, ProQuest; Amy Brown, Burns Library, Boston College (RBMS Controlled Vocabularies co-editor); Brenna Bychowski, Beinecke Library, Yale University; Kalan Knudson Davis, University of Minnesota; Alison Greenlee, Wayne State University (attended virtually); Ryan Hildebrand (RBMS Controlled Vocabularies co-editor, attended virtually); 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; Honor Moody, Harvard Library (CC:DA liaison); Kate Moriarty, Saint Louis University (secretary); Iris O'Brien, British Library; Brian Stearns, University of Alberta; Amy Tims, American Antiquarian Society.

Liaison present

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

Visitors present

Erin Blake, Folger Shakespeare Library; Valerie Buck, Brigham Young University; Ruth Carruth, Beinecke Library, Yale University; Annie Copeland, Penn State University; Ellen Cordes, Lewis Walpole Library, Yale University; Maren Cornett, University of Delaware; Zoe Dobbs, Texas A&M University; Matt Ducmanas, Temple University; Emily Epstein, University of Colorado Health Sciences; Jane Gillis, Beinecke Library, Yale University; Jessica Grzegorski, Newberry Library; Sarah Hamerman, Princeton University; Matthew Haugen, Columbia University Libraries; Nancy Kandoian, New York Public Library; Megan Kelly, Newberry Library; Mary Lacy, Library of Congress; Martha Lawler, Louisiana State University-Shreveport; Jennifer MacDonald, University of Delaware; Danijela Matković, Beinecke Library, Yale University; Philippe Mongeau, Rare Book School (attended virtually); Ann Myers, Stanford University; Jennifer Nelson, Robbins Collection, University of California Berkeley; Margaret Nichols, Cornell University; Jackie Parascandola (University of Pennsylvania); Audrey Pearson, Beinecke Library, Yale University; Beth Shoemaker, Rose Library, Emory University; Brittney Washington, Harry Ransom Center; Chela Weber, OCLC.

The RBMS Executive Committee liaison encouraged the BSC to submit session proposals for the 2020 RBMS conference and invited all interested to attend the RBMS 2020 Conference Program Planning Committee at 11:30 a.m. Sunday at the George Washington University Gelman Library, room 219.

2. Settlement of the agenda

There were two changes to the agenda. Agenda item 9, *Examples to Accompany Descriptive Cataloging of Rare Materials (Serials)*, was moved to follow item 5. Agenda item 9a, Manufacturing information in *Descriptive Cataloging of Rare Materials (Books)*, was added.

The chair noted the committee activities that will not be reported on at this meeting: Experts Directory; OCLC Member Merge Working Group; *Standard Citation Forms* Editorial Group; and *Web Resources for the Rare Materials Cataloger* Editorial Group. The Experts Directory and OCLC Member Merge Working Group will be featured at the next virtual meeting.

The chair also encouraged anyone available to attend the *RBMS Controlled Vocabularies* Editorial Group (CVEG) meeting later this afternoon. CVEG Co-Editor Amy Brown gave a preview of discussion items: a final discussion of the CVEG subdivision policy, with the hope to vote on and pass it; and review of the first draft of the prefatory material for the introduction of the new vocabularies. There will be an option for attending virtually.

3. Approval of BSC meeting minutes

Members voted to approve the ALA 2019 Midwinter Meeting minutes and the 2019 May 1 virtual meeting minutes (see Appendix D).

The chair has started to think about succession planning for the BSC secretary position as the current secretary's term ends June 2020. He asked current and incoming BSC members to contact him and/or the current secretary if interested. The hope is to incorporate a training period before the new secretary starts.

4. Consent agenda

Following discussion at the May 1, 2019 virtual meeting, we voted unanimously via ALA Connect to pass the committee's revised charge. At this meeting, the consent agenda was ratified by a vote of 15 in favor, 0 opposed.

5. Updates from the BSC Chair

The Web Team Liaison position is open to interested BSC members. The duties include posting meeting documents to rbms.info and revising the content of the BSC [web page](#). The time commitment is roughly five to ten hours per year. The current liaison, Randy Brandt, is available to train the incoming liaison. Contact the BSC chair if interested. [N.B. After the meeting, Jessica Grzegorsky volunteered for and was appointed to the position.]

9. Examples to Accompany Descriptive Cataloging of Rare Materials (Serials) (Gillis)

In May, BSC members reviewed the second draft of the introduction, the examples, and the index. The next steps are 1) Library of Congress (LC) review and consideration and incorporation of LC revisions; 2) BSC approval; 3) RBMS Executive Committee approval. The editors are also meeting with LC's Ivey Glendon to ensure a smooth incorporation of the publication into *Cataloger's Desktop*, since *Examples* will be the first new work added to *Cataloger's Desktop* after its move to a new platform.

6. BSC Program Planning Group (Bychowski)

2019 Baltimore, review

1. Workshop: Introduction to Rare Materials Cataloging for the Non-Cataloger:

<https://sched.co/KfQW>

This workshop, planned and taught by Brenna Bychowski and Amy Tims at the 2019 RBMS Conference, was attended by 22 curators and public services librarians from both large and small institutions. The evaluations were uniformly positive with one attendee

asking if the presenters would be willing to conduct a two-day workshop. Anyone who would like a copy of the slides can contact Bychowski and Tims.

2020 Bloomington, proposals

The Program Planning Group (PPG) submitted a slate of six proposals (two papers/panels, two participatory sessions, one seminar, and one workshop) to BSC for consideration as BSC-sponsored sessions at the RBMS 2020 conference. Once a proposal is approved by BSC, the PPG helps proposers with the RBMS submission process. If it is determined at this meeting that a proposal needs to be revised, BSC can vote on it at a later date. Each proposal was briefly introduced by its organizer, if present, followed by a facilitated discussion by Bychowski, and a vote by BSC members. These notes focus on feedback and discussion. For a full description of the proposals, see “RBMS 2020 Session Proposals” in Appendix A.

Proposal 1 (Papers/Panels): Culturally Competent Description in the Library Catalog

Feedback on the proposal was very positive. Suggestions included considering the ethics of catalogers hiding material considered objectionable, negotiating old terminology with new, and ensuring representation on the panel of communities under discussion. The proposal passed with 14 in favor, 0 opposed.

Proposal 2 (Papers/Panels): Mitigating Pejorative Terminology in LCSH

Suggestions included incorporating a significant amount of time for discussion, facilitated by a strong moderator who could deeply engage attendees; and possibly co-sponsoring the session with another ALA group to which one of the presenters belongs.

Reservations included

- A concern that the selecting committee might consider the topics of our two paper/panel proposals to be too similar to accept both - should we prioritize them?
- Is this more appropriate for a discussion format?
- LCSH is not really in BSC's domain
- Some of the papers recommend non-standard practices. By sponsoring this session, are we backing away from our commitment to national standards? Do we need a session on the pros and cons of including non-standard subject access points?
- This is an area where there has already been some conversation
- A request for clarity on the place of linked data in the paper: linked data, retention of librarians of marginalized communities, and the effect on description.

Expressions of support included

- An interest in the specific topic of LCSH terminology
- An observation that this panel is differentiated from the Culturally Competent Description in the Library Catalog proposal by its separate content, such as local vocabularies to represent indigenous people

- Sponsoring the session would likely send a signal that these are potential ways to support both national standards and equitable description and access
- This panel would engage with the conference theme, Power, Resistance, and Leadership
- An observation that designating this proposal as a discussion session also requires prioritization as there are already two discussion/participatory session proposals
- An appreciation for the diversity represented in the panel

The proposal was tabled. The PPG will communicate the comments to the session planners and ask them to reformulate the session. The PPG will then return to the BSC with a revised session on which to vote.

Proposal 3 (Participatory Session): “My Favorite Mistake: Technical Services Edition”

The tentative format of this session is six brief presentations followed by small break-out discussion sessions (with white board), each moderated by one of the presenters. Participants would rotate among the tables. The proposal passed with 14 in favor, 0 opposed.

Proposal 4 (Participatory Session): Conversations between Rare Materials Catalogers and Non-Catalogers

There was a suggestion to adjust the description and focus of the session so that the conversation is two-way, rather than the current emphasis on non-catalogers asking catalogers questions. Possibilities include co-sponsoring with a group that is focused on outreach and curatorial work and having four speakers: two catalogers, two non-catalogers from the co-sponsoring group. The session organizer agreed to these changes and the proposal passed with 12 in favor, 1 opposed.

Proposal 5 (Seminar): LD4P2 and Rare Materials: Reports from the Field

The two suggestions pertained to the session description: include brief descriptions of LD4P2 (and its relation to LD4P) and the cohort model. The proposal passed with 14 in favor, 0 opposed.

Proposal 6 (Workshop): Cataloging Artists’ Books

Depending on the accessibility of the Lilly Library’s artists’ books collection (the library will be undergoing renovations at the time), the workshop leaders are hoping to use actual artists’ books in the session. In response to a question regarding the use in the workshop of the DCRM module rather than RDA, it was noted that catalogers have been interested in learning how to apply DCRM to more contemporary materials. There were suggestions to include in the proposal the qualifications of the workshop leaders and to make a working knowledge of at least one DCRM module a requirement. With the understanding that the suggestions would be adopted, the proposal passed with 13 in favor, 0 opposed.

Bychowski thanked the PPG and BSC for their work in developing the proposals.

7. Art & Rare Materials BIBFRAME Ontology Extension (Kovari)

The ACRL/RBMS-ARLIS/NA-SAA Joint Task Force on Development of the Art and Rare Materials BIBFRAME Ontology Extension (ARM TF) began their work in the spring to publish and refine a BIBFRAME ontology extension for the description of special collections materials. As the Society of American Archivists (SAA) was not involved in the initial development of the Art & Rare Materials BIBFRAME Ontology Extension (ARM), one of the activities was to review the foundations of ARM with the SAA members, who then developed and submitted their use cases to the ARM TF. The next steps are to review and modify the current modeling, model the SAA use cases, and develop any needed new modeling. Drafts of models will be presented to the ARM TF's three parent organizations for review, discussion, and eventual approval, at which point issues such as hosting will be considered.

8. LD4P2: Rare Materials Affinity Group (Pearson / Washington)

Information on the LD4P2 Rare Materials Affinity Group, including potential projects, can be found at <https://wiki.duraspace.org/display/LD4P2/Rare+Materials+Affinity+Group>.

The affinity group co-conveners reported at this meeting to give BSC members an opportunity to learn more about the group, ask questions, and discuss ways in which the BSC can work with the affinity group during the remaining year of the grant. One of the group's projects is to develop and compare an application profile based on ARM with LC's rare materials profile. The group is also looking for someone who has experience/interest in developing manuscripts or other non-printed-book application profiles to join the group. It was generally agreed that the work of the affinity group will help inform what BSC's work is. Those interested in attending the monthly Zoom meetings can contact the co-conveners.

9a. Manufacturing information and *Descriptive Cataloging of Rare Materials (Books)* (Leslie)

As *Descriptive Cataloging of Rare Materials (Books)* (DCRM(B)) was published before the existence of the MARC 264 field, it instructs catalogers to append in parentheses grammatically separate manifestation statements to publication information. This results in unwieldy statements in the MARC 260 field. Now that we have the ability to encode manufacture statements in a separate MARC 264 field, the forthcoming version of DCRM(B) will add instructions to record separate manufacture statements. The request made at this meeting was for approval of implementing and teaching the practice now, allowing the cataloger to code the MARC 040 subfield \$e as "dcrmb." There was general approval of the request.

10. Report of the RBMS Liaison to the Committee on Cataloging: Description and Access (CC:DA) (Moody)

On a question of communication, it was agreed that the liaison to the Committee on Cataloging: Description and Access (CC:DA) will distribute to the DCRM-L list CC:DA agendas and reports relevant to the rare materials community as they become available, and, when possible, provide a summary. The liaison is also available for questions.

The liaison gave highlights from the CC:DA 3R Project Task Force [report](#). Among other things, the task force has recommended to the RDA Steering Committee (RSC) and identified as possible future CC:DA work: 1) developing a guideline or an application profile on the provision of access points, 2) helping the RSC in their project to merge guidelines on pseudo-elements (elements for specialized works, such as musical and religious works) with the main guidelines, 3) developing guidelines for choosing the preferred title for an expression, 4) determining whether the summarization of content should be done at the work or expression level, and 5) addressing the cardinality issues involved in the work-expression-manifestation (WEM) lock for diachronic works and the WE lock for aggregating works.

Other relevant CC:DA conference activities are also RDA-related and include a presentation by the RSC, both general information on and the British Library's perspective of policy statement development, a discussion of non-human personages, and general continued discussion on RDA.

The CC:DA liaison received a round of applause for her recent appointment as RDA Examples Editor, which begins January 2020. She will implement the provision of examples in context and hopes to institute examples in compliance with some of the policy statements.

11. RBMS Policy Statements Editorial Group (Mascaro)

The RBMS Policy Statements (RBMS PS) editor announced that Elizabeth Hobart will come on as co-editor July 1 for a transition year, after which she will become editor.

In April, the stabilized English text of the revised *Resource Description & Access* (RDA) was published in the RDA Toolkit, revealing substantial changes to its structure, content, and language. The consequence is that the RBMS PS require extensive revision as well as additional guidance for the new RDA elements. Before beginning, the editorial group wanted to use the occasion to reassess the format that RBMS guidance should take. Feedback and ideas were sought at this meeting and will also be received at Sunday's RBMS Policy Statements Editorial Group meeting and RBMS Technical Services Discussion Group session. There will be additional opportunities at a later date to weigh in virtually. For a detailed treatment of the history of the RBMS PS, the issues we currently face, and potential options for moving forward, see the editorial group's report, "Discussion of Next Steps for the RBMS Policy Statements to RDA," in Appendix B.

The editor outlined three possible formats for RBMS guidance and solicited ideas for additional forms. The three formats presented and discussed were 1) revised RDA policy statements, 2) a revised Descriptive Cataloging of Rare Materials (DCRM) suite, and 3) a rare materials application profile. Recognizing that there are still numerous unknowns with the RDA Toolkit, the general feeling of the meeting was to use RDA policy statements that link to an external revised DCRM manual. This would

accommodate the decentralized nature of the Toolkit for those who catalog mostly in the Toolkit and allow for more detailed and coherent instructions that would be freely available. [N.B. Following discussion at the Editorial Group meeting on Sunday morning, a decision was made to rewrite the DCRM manuals as an integrating resource, which will be freely available online. The Editorial Group will then construct policy statements to incorporate in the RDA Toolkit, which will link out to the more complete instructions in the manual.]

It was noted that, since the submission of the report in Appendix B, the Toolkit has expanded referencing/linking capability to “options” (formerly the function was limited to the broader guidance category, “conditions”).

12. *Descriptive Cataloging of Rare Materials (Manuscripts) and Descriptive Cataloging of Ancient, Medieval, Renaissance, and Early Modern Manuscripts (AMREMM) (MacDonald)*

Charged with assessing and making recommendations on the future of AMREMM and *Descriptive Cataloging of Rare Materials (MSS)* (DCRM(MSS)), the AMREMM/DCRM(MSS) Review Group began with a thorough comparison of the two standards and determined that it would be feasible to combine them into one standard for describing manuscripts at the item level. The comparison document will be appended to the review group’s final report. They recommend including in the successor standard more guidance on discoverability, such as through the use of genre and form terms and other access points. Recommendations on alignment with the other DCRM modules will be made once the RDA PS Editorial Group settles on a format for rare materials RDA guidance. Another model to which the new manuscripts standard could align is the [CIDOC Conceptual Reference Model](#). In order to ensure that the new manuscripts standard meets the needs of users (catalogers, scholars, etc.), a [user-needs survey](#) was distributed to 10 electronic lists. Almost 150 responses have been received already. The last day to respond is July 9, 2019. The review group also recommends considering drawing on the expertise of specialists in non-Western and non-Roman-script manuscripts to expand the scope of the successor standard.

For additional information, see the review group’s report in Appendix C.

13. Announcements from the floor

Yale University’s Beinecke Library is hiring a catalog/metadata librarian (librarian rank 1 or 2). Experience in non-monographic formats is a plus.

Yale University’s Lewis Walpole Library has a three-year term opening for a project archivist/manuscript cataloger.

14. Acknowledgements

The chair welcomed the new members who will join the committee July 1: Liz Adams, Valerie Buck, Matthew Ducmanas, Jessica Grzegorski, Rafael Antonio Linares Blasini, Philippe Mongeau, Jessie Sherwood, and Brittney Washington.

He extended his appreciation to those members renewing for another two-year term: Kalan Knudson Davis, Elizabeth Hobart, Linda Isaac, Francis Lapka, Deborah J. Leslie, Michelle Mascaro, Iris O'Brien, and Brian Stearns.

Welcomed to the committee were our two new ex-officio members, Brenna Bychowski and Lauren Reno, the incoming co-editors of the Controlled Vocabularies Editorial Group. The outgoing co-editors, Amy Brown and Ryan Hildebrand were thanked for an incredible job over the last several years.

The chair also thanked those members completing service: Randy Brandt for 10 years as the Web Team liaison; Amy Tims, who rolls off the committee in July; Linda Isaac and Ann Myers for their work on the Experts Directory and a thank-you to Liz Adams for assuming leadership of that project; and a special thanks to Ann Myers for her instrumental work over the years on *Standard Citation Forms*, with a thank-you to Valerie Buck and Jessie Sherwood for picking up the co-editorship.

The chair recognized Jane Gillis who retires in September after 50 years of service to Yale.

15. Adjournment

The chair encouraged everyone to attend tomorrow's RBMS PS Editorial Group and closed the meeting at 11:33 a.m.

Respectfully submitted July 1, 2019 by Kate Moriarty, RBMS Bibliographic Standards Committee secretary.

Appendix A. RBMS 2020 Session Proposals

Report submitted for discussion at the Bibliographic Standards Meeting at ALA Annual, Washington, D.C., June 2019, on behalf of the Program Planning Subgroup:

Brenna Bychowski, lead
Katelyn Borbely
Francis Lapka

The following six proposals (2 papers/panels; 2 participatory sessions; 1 seminar; 1 workshop) for sessions to be held at the RBMS 2020 conference in Bloomington, Indiana have been prepared for review by BSC to determine BSC sponsorship of the sessions. The Program Planning Subgroup would like to thank everyone involved in the preparation of these proposals for their hard work over the past months.

Proposal 1 (Papers/Panels)

Title: Culturally Competent Description in the Library Catalog

Organizer: Elizabeth Hobart

Summary: Cataloging is not a neutral act. Describing and classifying resources, assigning subject headings, and establishing authorized name forms all require catalogers to make judgment calls. At the same time, dominant narratives around librarianship ask librarians to maintain neutrality. Too often, these attempts at neutrality have led to enforcing the status quo, which have the effect of preserving systems of privilege existing within society. As librarians begin to realize the ways in which catalog descriptions have harmed or marginalized underrepresented groups, catalogers are beginning to move toward more culturally competent descriptions and re-descriptions. Inspired by a conference session from SAA 2018, this session will look at the work of catalogers and other information professionals to create or revise catalog records with greater cultural competency awareness.

Confirmed Speakers and Topics:

Ethics of zine cataloging – Joshua Barton and Tad Boehmer

Creator terms, LCDGT, and ethics of describing people – Elizabeth Hobart

Racist imagery and description of special collections resources – Maurice B. Wheeler

Names, Titles, Emails and Affiliations of presenters:

Joshua Barton, Head of Cataloging and Metadata Services and Zine Librarian, bartonjp@msu.edu, Michigan State University

Tad Boehmer, Curator of Rare Books and Special Collections Cataloging, boehmer6@msu.edu, Michigan State University

Elizabeth Hobart, Special Collections Cataloging Librarian, efh7@psu.edu, Pennsylvania State University

Dr. Maurice B. Wheeler, Association Professor, Maurice.Wheeler@unt.edu, Department of Information Science, University of North Texas

Proposal 2 (Papers/Panels)

Title: Mitigating Pejorative Terminology in LCSH

Organizers: Christian Lash and Sata Prescott (both Northern Illinois University)

Summary: Library of Congress Subject Headings were initially developed in 1898 with the purpose of a narrow field of description. LCSH has since been a widely used basis for a number of other organizational systems, and has expanded in order to fulfill the needs of a much broader audience. Given their date of creation and slow rate of change, LCSH inevitably contains many biases and terminologies which are insulting, unused, or simply confusing. As in almost every arena, these biases have an outsized impact on marginalized communities. This panel will showcase issues of biased and pejorative language in LCSH and discuss some of the methods used at local, connected, and higher levels to rephrase insulting wordage and improve access for patrons.

Tentative Speakers and Topics:

Christian Lash and Sata Prescott (Northern Illinois University): Introduction to biases in subject headings, using the Johannsen Digitization Project of dime novels as a case study

KR Roberto (University of Illinois) (speaker not yet confirmed): added local vocabularies and tags to supplement LCSH headings (Focus on indigenous populations and/or LGBTQ+)

Amber Billey (Bard): locally replacing subject headings with strategies should they change; specifically work with “Illegal aliens,” LGBTQ+ headings, and gender terminology

Tiffany Henry (University of North Carolina Greensboro): linked data? Work with headings dealing with race. Recruitment and retention of librarians from marginalized communities, and how that affects description.

Proposal 3 (Participatory Session)

Title: “My Favorite Mistake: Technical Services Edition”

Organizer: Amy Brown

Structure: 7 lightning talks, 6 minutes each; 45 minute discussion

Summary: Under the guiding principle that we can learn as much (if not more) from our failures as our successes, this session will gather special collections technical services librarians from various stages in their careers to give brief lightning talks on an elucidating error from their career. Presenters will

explain how strategy, tragedy, luck, exasperation, effort, colleagues and collaboration enabled them to recover from or survive the outcomes of their mistake. A slightly longer-than-usual 45 minute discussion period will provide an opportunity for audience members to ask questions or volunteer their own stories of blunder or miscalculation in a safe space.

Modeled after a similar session at SAA 2018, this panel aims to normalize the inevitability and recognize the resulting value inherent in the mistakes we make throughout our professional careers, rather than focusing exclusively on highly successful, completed projects. This is particularly relevant given the session's technical services focus, where a culture of perfection is somewhat prevalent.

This session is envisioned as a hybrid between a panel and participant-driven session. There is a large component of audience participation, but a number of panel speakers as well. In order to ensure that the desired safety of the space is realized, this session should not be recorded.

Proposal 4 (Participatory Session)

Title: Conversations Between Rare Materials Catalogers and Non-Catalogers

Organizer: Kalan Knudson Davis

Summary: At the RBMS 2019 Conference in Baltimore, Maryland, Amy Tims and Brenna Bychowski co-lead a Bibliographic Standards Committee sponsored workshop with the goal of introducing rare materials cataloging for special collections practitioners who never, or rarely, find themselves creating cataloging records. This participatory session is an extension of the questions raised and conversations started during this workshop.

The library catalog is a ubiquitous and essential tool in any special collections library. Changes in cataloging practice through the years, the specialized lingo that catalogers use, and the type of information included (and not included) in cataloging records can cause confusion between special collections staff and their catalogers. This participatory session aims to fill in the gaps and facilitate communication as we work together towards our shared goals of helping patrons (and each other) find and access materials.

Session leaders will share first hand accounts of their successes and struggles followed by focused, interactive discussion groups that will give attendees a chance to raise concerns and share ideas. Discussions will explore ideas for the following topic areas:

- Creating and communication of rare materials local cataloging policy
- Recording local and copy-specific data for rare materials in the catalog
- Why is rare materials cataloging important to you?
- In what way is rare materials cataloging confusing to you?
- What common goals do special collections staff and rare materials catalogers share together?

- What makes rare materials cataloging “quality” ?

We hope to facilitate productive and friendly conversations between cataloging and non-cataloging professionals at all career levels and paths, from recent graduates to seasoned professionals.

Tentative Speakers and Topics:

Amy Tims, Cataloging Initiatives Librarian, American Antiquarian Society

Brenna Bychowski, Catalog/Metadata Librarian, Beinecke Library, Yale University

Kalan Knudson Davis, Special Collections Metadata Librarian, University of Minnesota

[A fourth cataloger?]

Proposal 5 (Seminar)

Title: LD4P2 and Rare Materials: Reports from the Field

Organizer: Audrey Pearson

Summary: The second phase of the Linked Data for Production (LD4P) project will conclude on June 30, 2020. This seminar will be a chance for the broader RBMS community to hear reports from those institutions that cataloged rare materials and special collections as part of their LD4P projects. Seminar presenters will describe the scope of their projects, the workflows that were developed, successes and failures, and will take a look ahead to what they see as the viability of and needed developments for an RDF-based future for cataloging to work for the RBMS community. This seminar will also touch on the developments of the ARLIS-RBMS-SAA Art & Rare Materials Ontology Extension Task Force, and how the LD4P participants used the ARM Ontology Extension to build more robust application profiles in the Sinopia editor.

This seminar will be of interest to technical services staff to see how metadata practice is developing, to administrators who will need to plan for upcoming changes, to reference and access services staff who will need to interact with the data and with users of the data, and generally to anyone who uses library metadata for discovery of materials.

Moderator:

Audrey Pearson, Beinecke Library, Yale University

Participants:

Linda Isaac, Houghton Library, Harvard University

Christine DeZelar-Tiedman, University of Minnesota

Paloma Graciani Picardo, Harry Ransom Center, University of Texas at Austin

Brittney Washington, Harry Ransom Center, University of Texas at Austin

Required Technology: Powerpoint, computer, projector, screen, microphones

Proposal 6 (Workshop)

Title: Cataloging Artists' Books

Organizer: Ann Myers

Summary: Artists' books are notoriously difficult to catalog, due in part to the nature of their production and the complexity of materials and construction, and the uniqueness of each copy. This workshop will include an introduction to some of the common challenges for describing artists' books, discussion of different cataloging standards to apply and the decision-making process for when to apply what standard, discussion of considerations in developing local artists' book cataloging policies and workflows, and will provide hands-on examples and guidance for cataloging artists' books according to Descriptive Cataloging of Rare Materials (DCRM).

Learning Outcomes: Participants will gain an understanding of the considerations involved in cataloging artists' books, and will gain practice in applying DCRM standards to the cataloging of different types of artists' books commonly found in special collections using provided examples. Handouts with examples and references to useful resources will be provided. Participants should have experience in MARC cataloging; familiarity with DCRM will be helpful.

Leaders (Tentative):

Ann Myers (Stanford University)

Nina Schneider (Clark Library, UCLA)

Whitney Buccicone (University of Washington)

Timeline:

9:00-9:30: Welcome and introductions

9:30-10:15: Introduction to artists' books, challenges, and different cataloging standards

10:15-10:30: Break

10:30-11:00: Exercise: When to use what standard and why; assessing initial challenges (lack of title page, etc.)

11:00-12:00: Physical description

12:00-1:00: Lunch

1:00-1:30: Exercise: physical description

1:30-2:30: Controlled vocabularies and subject headings

2:30-2:45: Break

2:45-3:15: Exercise: Controlled vocabularies and subject headings

3:15-3:45: Wrap up, questions and answers

3:45-4:00: Evaluations

Equipment:

If participants can bring laptops to access DCRM manuals, RBMS Controlled Vocabularies, AAT, etc. that will be helpful but not required

Moveable chairs and desks/tables that can be arranged for small groups

Whiteboard, markers, and erasers

Internet access - ideally wifi

Power cords/outlets

Projector to connect to laptop and screen (also a laptop?)

Handouts - annotated list of standard sources (controlled vocabularies, subject headings), example records

Books or facsimiles for hands-on exercises

Appendix B. Discussion of Next Steps for the RBMS Policy Statements to RDA

Submitted to RBMS Bibliographic Standards Committee for ALA Annual
by Michelle Mascaro, RBMS PS editor, on June 6, 2019.

Background

At ALA Annual 2017, the Descriptive Cataloging of Rare Materials Task Force completed an initial draft of the RBMS Policy Statement to RDA and disbanded. These draft policy statements documented the task force's consensus on the preferred cataloging outcomes for rare materials (with the exception of a few outstanding format specifics for still image and cartographics that warrant additional input from that specialist community). In the vast majority of cases, the task force upheld the cataloging outcome specified in the DCRM suite, with some occasional minor tweaks to conform with RDA formatting (e.g., policy statements adopted the RDA convention the specify a volume is incomplete with "incomplete" versus "+"). The policy statements were also written to mirror RDA's structure and language to support the possibility of a rare materials Toolkit view where the select text of RDA proper would be replaced with the text of the RBMS PS to emulate a consolidated manual.

With the task force disbanded, the Bibliographic Standards Committee assumed the task of shepherding the publication of the policy statements into the RDA Toolkit. However, the completion of the DCRM Task Force's work corresponded with the start of the RDA Steering Committee's RDA Toolkit Redesign and Restructure Project (a.k.a 3R Project), putting the work of finishing the policy statements on hold until the RSC released a stabilized revised English RDA text. While initially expected in June 2018, the stabilized English was finally released on April 30, 2019. At the time of submitting this report, ALA publishing has not provided the BSC with best practices and instructions for adding policy statements to the new Toolkit. (Jamie Hennley hopes to do so by Annual). The couple of placeholder policy statements currently available in the Beta Toolkit are very bare bones, so we do not have a complete picture of how policy statements will ultimately display/function and what functionality (such as images) will be supported.

The Beta RDA Toolkit implemented some significant changes warranting an re-examination of what would be the best format for future rare materials cataloging guidance to take. The purpose of this paper is to outline the situation and spark further discussion versus advocating for one solution or another.

Significant Changes in the New Toolkit

One of the most significant changes in the new RDA is the number of elements has grown exponentially, and at times represents varying degrees of granularity. (For example, an edition statement in a parallel language or script, can be recorded as an additional value in "designation of edition" or separately as a "parallel designation of edition.") The new RDA also has new sections on

[diachronic works](#) and [aggregates](#) that represent a significant model shift from the current Toolkit.* In this new structure, instructions that were previously together are now dispersed. (For example, guidelines on sources of information are under “data provenance” versus appearing with each element.) The new RDA proper does not designate any elements as core, leaving it up to cataloging communities to develop application profiles that specify which elements are core for their applications.

The new RDA guidelines are also designed to accommodate the practices of a variety of international cataloging communities, including facilitating acceptance of vendor generated data, and are less prescriptive than the current Toolkit. “There is no one right way to catalog,” as stated by RDA Technical Team Liaison Officer, Gordon Dunsire. All instructions are presented as a series of options, which depending on the context may or may not be mutually exclusive. There are also conditions with only one option, which are the equivalent of “if considered important” instructions in the current Toolkit. Guidance in some cases is more generalized than the current Toolkit (e.g, in the case of multiple values of an elements one of the standard options is to “record one or more values separately in the order indicated by the sequence, layout, or typography of the source of information.”). There is also quite a bit of boilerplate language repeated between each element.

Ultimately, the new RDA Toolkit text essentially supports all the same cataloging outcomes as the current Toolkit, as well as introduces additional options to support future linked data applications. At this point, it is not anticipated that there will be any significant changes in practices for creating MARC descriptions (or metadata works to use the new Toolkit terminology). Being an extremely flexible standard, the revised RDA is not incompatible for cataloging rare materials, but on its own lacks the detailed guidance for creating rare materials metadata works that the DCRM suite offers.

The revised structure of RDA is significant enough that the current draft policy statements would need significant revisions before being added to the Toolkit, even if ultimately the cataloging outcomes would not change. Specifics that were previously stated directly in the RDA proper are now gone and would have to be specified in the policy statements or in some sort of application profile. Additional policy statements will also need to be written for several of the new RDA elements.

Potential Formats for Rare Materials Guidance

Given the significant changes to RDA, it is worth considering whether creating policy statements best meets the needs of the cataloging community. Sustainability and the timeliness that a product can be completed are also considerations that need to be taken into account for any solution. (Writing cataloging standards is time consuming, and as an example, the average length of time to write each individual DCRM module was about eight years.) The following are some potential options, with some highlighted pros and cons to each approach.

RDA Policy Statements

One of the main advantages for continuing the policy statement route is the fact that by placing rare materials guidance directly in the main cataloging standard they would be more visible to catalogers, who only occasionally catalog rare materials. Additionally, the creation of policy statements would support institutions who have mandates (such as the Library of Congress) to do all cataloging in RDA and need to make RDA descriptions for rare materials.

However, one of the main challenges of the entire RBMS PS project has been attempting to write policy statements for RDA text that is constantly changing, an issue which the 3R project was highlighted further. Maintaining the policy statements would be an ongoing project even after initial publication.

Revise DCRM Suite

Another potential option is to commence a revision of the DCRM suite and provide an appendix mapping instructions to the RDA element set. Some advantages to this approach is that writers would have more freedom in how to structure rules and no longer limited by the structure of the Toolkit (such a potential lack of support for images). In particular, policy statement writers have found it difficult to replicate the detailed guidance currently within the DCRM manuals as policy statements. Additionally, unlike policy statements, a revised suite of DCRM manuals would not be behind a paywall.

Disadvantages to this approach is institutions with policies to do all cataloging in accordance with RDA may not find a map to the RDA element set sufficient to meet their needs. Also by maintaining a separate standard there is a danger for rare materials cataloging practice to get out of sync with the general cataloging community, which can be a challenge for shared databases. Stand alone manuals are also not as easily updated as policy statements to changes in cataloging landscape, such as moving from MARC to BIBFRAME.

Create a RDA Rare Materials Application Profile

The RDA Beta Toolkit provides some guidance for developing [application profiles](#) * for creating RDA descriptions for a particular community, including specifying which RDA elements to include. While policy statements are a type of application profiles, there are other forms that application profiles can take. The BIBCO Standard Record (BSR) is a commonly known RDA application profile and currently used by members of the rare materials community to create RDA compliant DCRM descriptions.

However, there is a limit to how much specific guidance non-policy statement application profile can reasonably include, particularly those that reside outside of the Toolkit. In the current Toolkit architecture, external referencing is at the condition versus the individual option level, so there is no neat way to specify apply option X for condition A in an external application profile.

One option would be to create application profile that provides a “quick reference” of the RDA elements that should be used in rare materials descriptions to complement additional guidance found in a set of policy statements or revised DCRM manuals.

Other Options

There may be additional options that have not previously been identified. RBMS PS subgroup of the Bibliographic Standards Committee is open to any suggestions.

Next Steps

The new RDA, while essentially supporting the same cataloging options, is a very different product than the one the DCRM task force based the draft RBMS PS on. At this point, members of the RBMS PS subgroup would like to solicit general input from the rare cataloging community on what form they would want future rare materials guidance to take. We will be soliciting feedback during ALA at the Bibliographic Standards Committee: RBMS Policy Statements Editorial Group Meeting (Sunday June 23, 8:30-10:00 AM at the Marriott Marquis, Salon 13) and during the Technical Services Discussion Group (Sunday June 23, 2:30-3:30 PM at the Marriott Marquis, Dupont Circle). Anyone who is unable to make either meeting on Sunday may send feedback directly to RBMS PS editor, Michelle Mascaro, (mmascaro@ucsd.edu) and incoming co-editor, Elizabeth Hobart, (efh7@psu.edu). There will be additional virtual opportunities to provide feedback following the conference.

Appendix C. AMREMM/DCRM(MSS) Review Group

Status report, June 7, 2019

The AMREMM/DCRM(MSS) Review Group first met in March 2019 to consider a number of different aspects related to the future of AMREMM in the context of DCRM standards.

1. Comparison of AMREMM and DCRM(MSS)

The Review Group carried out a full comparison of the two standards, parsing out which instructions were essentially the same, which were contradictory, and which were in only one standard. Based on this comparison, the group concluded that combining the two standards is feasible. Places where the rules contradict one another tend to highlight older practices in AMREMM that are no longer consistent with current practices. Going forward, catalog descriptions of pre-modern manuscripts should focus less on transcription and more on discoverability. The comparison is being worked into a single document to be included as an appendix to the final report. Additionally, with discoverability in mind, the Review Group recommends that future editors consider the inclusion of guidelines on access points and form and genre terms.

2. Review of potential alignments

Because the RBMS Policy Statements Editorial Group has many issues to resolve concerning IFLA and RDA, the discussion of how a new standard for single item manuscript description would align with the rest of the DCRM modules has been postponed until the Policy Statements Editorial Group completes its work. However, we did review two other conceptual models: RiC and CIDOC-CRM. Note that neither of these models adequately addresses the idea of a work, which is central to the description of many types of manuscripts.

Records in Context (RiC): in development by the International Council on Archives Expert Group on Archival Description (ICA EGAD). RiC builds on the ICA's existing standards. It is concerned with moving from hierarchy and the "multilevel description" of ISAD(G) to a "multidimensional description" in the form of a graph or network. Much of this is tied to the different ways individuals and groups interact with collections and parts of collections and focuses on bringing out relationships among/between collections and/or parts of collections. Progress on this standard has been difficult to gauge, and the group developing it has not engaged much with SAA. Some aspects of the model, such as those related to administration, access, and use, are applicable to the description of individual manuscripts, but overall it doesn't seem suitable in its current iteration. We will need watch for a new iteration to be released, whenever that might be. <https://web.esrc.unimelb.edu.au/ICAD/biogs/E000219b.htm>

CIDOC Conceptual Reference Model: CIDOC is the International Committee for Documentation of the International Council of Museums (ICOM). Their Conceptual Reference Model (CRM) is not a metadata standard but rather an organized system for programmers seeking to ingest and integrate data about different types of information from inconsistent sources, such as records from aggregated metadata or those from collections with

widely different types of information objects such as those held by museums. CIDOC-CRM addresses the disuse of controlled vocabularies and authority files, but at the programming level, not the cataloging level. If IFLA and RiC end up being unsuitable for the description of manuscripts, this is a model generic enough to support our work.

<http://www.cidoc-crm.org/>

3. Survey of user needs

The Review Group will post a Google Forms survey by June 14, 2019 on appropriate lists, including DCRM-L, aimed at those who describe and/or search for single item manuscripts. Anyone involved in describing or researching single item manuscripts of any kind is encouraged to take the survey, but **please hold off until June 14, 2019**. Any responses made before that date are subject to deletion. The last date for accepting completed surveys is July 9, 2019. The survey will be available here: <https://forms.gle/RzERYUbkirFV7Y1n8>

4. Non-Western/non-Roman script manuscripts

The question of whether the new standard could or should encompass non-Western manuscripts and/or manuscripts in non-Roman scripts came up in some initial discussions. Expanding a merged AMREMM-DCRM(MSS) or a successor standard to AMREMM to encompass non-Western manuscripts and/or manuscripts in non-Roman scripts, however, will likely require both effort and expertise to develop instructions and examples. AMREMM's existing scope is predominantly western European manuscripts written prior to 1600 and in Roman scripts. More comprehensively incorporating non-Western manuscripts should entail: 1) addressing non-Roman scripts more specifically, including their transcription, transliteration, and various modes of writing; 2) acknowledging other manuscript cultures and conventions; and 3) recognizing other materials and formats, such as tree bark and palm manuscripts, orihon and fukurotoji books. It should involve consulting with and/or including specialists in various non-Western languages and manuscript traditions in order to determine how much specialized guidance is needed or desired, and what can and should fall within the scope of the merged or successor standard.

Appendix D. BSC Minutes 2019-05-01

Minutes

Bibliographic Standards Committee

Virtual Meeting

Zoom, Wednesday, May 1, 2019

12:00 - 1:30 pm EDT



1. Standard Citation Forms Editorial Team Report
2. Web Resources for the Rare Materials Cataloger Editorial Group Report
3. BSC Charge Revision

Appendix A: Standard Citation Forms Editorial Team Report

Appendix B: Report of the Web Resources for the Rare Materials Cataloger Editorial Group

Appendix C: Revised BSC Charge

Members present: Francis Lapka, Yale Center for British Art (chair); Katelyn Borbely, ProQuest; Amy Brown, Burns Library, Boston College (Controlled Vocabularies Editorial Group co-editor); Brenna Bychowski, Beinecke Library, Yale University; Kalan Knudson Davis, University of Minnesota; Ryan Hildebrand (ex-officio: Controlled Vocabularies Editorial Group co-editor); Linda Isaac, Houghton Library; 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; Brian Stearns, University of Alberta.

Visitors: Liz Adams, Duke University; Jeff Barton, Princeton University; Courtney Brombosz, University of Nevada, Las Vegas; Matthew Ducmanas, Temple University; Jane Gillis, Beinecke Library, Yale University; Matthew Haugen, Columbia University; Eileen Horansky, Lewis Walpole Library, Yale University; Martha McTear, UC Santa Barbara; Ann Myers, Stanford University; Audrey Pearson, Beinecke Library, Yale University; Felicia Piscitelli, Texas A&M University; Brittney Washington, Harry Ransom Center, University of Texas-Austin.

Members absent: Alison Greenlee, Wayne State University; Elizabeth Hobart, Pennsylvania State University; Honor Moody, Harvard Library (CC:DA liaison); Amy Tims, American Antiquarian Society.

The chair opened the meeting by welcoming attendees and noting that we may have one more virtual meeting before ALA Annual. [N.B. Since then, it was determined that there will be no virtual meeting prior to ALA Annual.] The chair will also shortly send members the annual survey of Bibliographic Standards Committee (BSC) activity interest.

1. Standard Citation Forms Editorial Team Report

See Appendix A for the Standard Citation Forms Editorial Team's written report.

Announcement of new co-editors

The Standard Citation Forms (SCF) editor announced that Valerie Buck and Jessie Sherwood are the incoming SCF co-editors, starting July 1. The current editor will shift to an advisory role.

New submission form

In an effort to streamline its workflow and increase its response time, the SCF team submitted for BSC review in September a draft revised submission form that would populate the WordPress citation record directly, eliminating the current two-step process involved in transferring information from a proposal to a citation record. The team incorporated as much of BSC's feedback as possible within WordPress limitations and re-presented the form at this meeting for final review and approval. Changes include more instructions and the addition of examples.

It was observed that though the number of required fields remains the same, the revised submission form is significantly longer and possibly daunting because of the inability to hide fields in WordPress. A suggestion was made and accepted to eliminate "but encouraged" from the form's introductory wording, "Fields marked with an asterisk are required; the rest are optional but encouraged." It was also suggested that the team note the baseline current proposal rate of 7-10 citations per month to track whether proposals drop off with the introduction of the new form. Another WordPress limitation is the inability to change its indexes, such as programming the authors index to accommodate three authors/indexes per record. A final suggestion was made and accepted to tweak the "Previous citation form" label to include variant forms of citations.

The form was approved via an informal vote in the Zoom chat function. An announcement will be posted to DCRM-L when the form is ready to go live. The BSC chair thanked the editorial team.

WordPress Issues

There was discussion on how to address current SCF issues, such as indexing, in light of the Web Team's report of significant problems with the two WordPress plugins used by SCF. The plugins, which have known security issues and have been deprecated, currently function but will need to be replaced - work which is beyond the capacity of the Web Team. BSC intends to form a working group to review SCF in light of linked data principles and the model for bibliographic citations drafted for the Art & Rare Materials BIBFRAME Ontology Extension (ARM); a note of caution was expressed regarding investing too many resources in addressing the WordPress issues before this higher-level evaluation of the resource is conducted. However, the plugin issues may affect the construction of another BSC initiative, the Experts Directory, which was going to use a similar architecture. The SCF team will get more detailed information on the extent of work needed to address the plugin problems as well as possible funding sources.

2. Web Resources for the Rare Materials Cataloger Editorial Group Report

See Appendix B for the Web Resources for the Rare Materials Cataloger Editorial Group's written report.

A beta version of the redesigned Web Resources for the Rare Materials Cataloger is now available at <http://rbms.info/cat-resources/>. The editorial group thanked the Web Team for its work in creating the site and requested feedback from the BSC. Reactions during the meeting were very positive and included appreciation of the site's appearance, organization, and ease of use as well as a recognition of its value to the rare materials cataloging community. Discussion then turned to timeline. Before going public, the editorial group will, within the next few months: craft the scope statement to guide future submissions; put in place a redirect from the old resource; send the resource to BSC for final review. After the public launch, the group will direct its attention to the following ongoing tasks: incorporate BSC feedback; craft editorial guidelines to increase consistency across the site, including the development of link naming conventions and guidelines for editorial comments; evaluate the link order within categories; and explore improving the search functionality, such as including more context in results lists. There was a suggestion to make clear on the website which aspects are still undergoing refinement. The BSC chair thanked the editorial group for its work.

3. BSC Charge Revision

The BSC submitted a revised charge to the RBMS Executive Committee (Exec) at ALA Midwinter 2019. The BSC chair acknowledged that this submission was premature, as the chair did not give BSC adequate time to discuss the revisions and BSC did not conduct a formal vote. Prior to this meeting, the BSC chair recirculated for discussion the working document used in the fall to revise the charge, along with a clean version of the charge. See Appendix C for the clean version. Few substantive changes had been made in the fall. Discussion at this meeting primarily focused on the Comment section's somewhat unusual phrasing, "provides aegis to" in reference to the BSC's relationship with the Controlled Vocabularies Editorial Group (CVEG). As the CVEG charge includes the language, "Under the aegis of the RBMS Bibliographic Standards Committee," it was ultimately decided that consistency in language across the two charges regarding the relationship between the committees was critical enough to warrant keeping the "provides aegis to" phrase in the BSC charge.

The chair noted that we will resume use of ALA Connect for formal virtual votes. He will call for a vote of the BSC charge on ALA Connect following the meeting. [N.B. The subsequent vote on ALA Connect ("Do you approve the revised BSC charge and RBMS manual revisions?") was 17-0 in favor.]

There was a question about approving the Midwinter 2019 minutes. The omission of minutes approval on this meeting's agenda was not noticed until shortly before the meeting so the decision was made to approve them at the next meeting. [N.B. Following the meeting, the chair decided that all draft minutes will be approved at the following meeting, whether in-person or virtual.]

Before closing, the chair reminded attendees of the ALA Annual 2019 meeting and that the survey on BSC activity preferences will be sent to members in the near future.

The meeting closed at 1:15 p.m.

Respectfully submitted May 13, 2019 by Kate Moriarty, RBMS Bibliographic Standards Committee secretary.

Appendix D1. Standard Citation Forms Editorial Team Report

Standard Citation Forms Editorial Team report
Bibliographic Standards Committee
May 1, 2019 virtual meeting

1. Announcement of new Co-Editors

Valerie Buck and Jessie Sherwood will be taking over as Co-Editors as of July 1, 2019. Ann Myers will shift to an advisory role on the Editorial Team.

2. New submission form

Our new submission form is ready to go live, pending BSC approval: <https://rbms.info/scf/submit/>

We made some changes in response to the feedback we got in the September 20, 2018 virtual meeting, including the addition of more instructions and examples for each field. Due to the current limitations of WordPress, we were unable to accommodate some of the formatting suggestions, like hiding duplicate fields, and we are limited in how we can format the text of the examples. We were also unable to add a third Author/Editor field because it could not be indexed properly.

We would like to implement this as soon as possible, and will make an announcement on DCRM-L when it goes live.

Question: Can we move forward with releasing the new submission form to the public?

3. WordPress issues

Kelli Hansen, our WordPress guru, has reported some concerning issues with how SCF is currently running. The plugins that make the SCF site work (Custom Content Type Manager and Shortcode Exec PHP) are both deprecated and have some known security issues. Both are still functioning right now, but will need to be replaced. Kelli is no longer able to access Shortcode Exec PHP through the admin interface, so we cannot make changes to the indexes such as adding a third Author/Editor field, or correcting issues with diacritics. Replacing these plugins might entail redeveloping the site, since the Custom Content Type Manager contains much of the data for the SCF pages. This would be beyond what the Web Team can handle themselves, but they are willing to work with us on finding the best solution.

We may want to look into hiring a WordPress developer since it's such a large project. The Web Team reports that the Instruction and Outreach Committee was at one point (and perhaps still is) interested in hiring a developer to help with the TPS Collective site. They were also interested in seeking grant funding to help support the work, so it may be worth reaching out to them if we want to consider this option. The Web Team has also indicated that they are willing to help us appeal to Budget and Development if we decide we need additional development funding.

Question: How do we want to address these development needs for the SCF site?

Submitted by the Standard Citation Forms Editorial Team:

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