

**Minutes (Draft)**  
**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 statement 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 A

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

## Appendix B

### Report of the Web Resources for the Rare Materials Cataloger Editorial Group - May 2019 Virtual Meeting

Submitted April 2019 to the ALA/ACRL/RBMS Bibliographic Standards Committee

#### Update

The Editorial Group is pleased to announce the completion of a beta version of the redesigned Web Resources for the Rare Materials Cataloger site. This draft is available for review at:

<http://rbms.info/cat-resources/>

The Editorial Group welcomes any and all feedback from BSC members on this new version (design, usability, organization, etc.). Once the feedback is incorporated and BSC approval is granted, the new site can “go live” and the former site (<http://lib.nmsu.edu/rarecat/>) can be retired.

#### Ongoing work

The Editorial Group views this beta version as just an initial step and has identified a number of immediate tasks to further develop the resource. As some of these will require a fair deal of time to complete, it was considered advantageous to approach them after the initial migration rather than to prolonging the process further.

- Editorial guidelines. The Editorial Group recognizes the need to establish basic editorial guidelines for the site. Naming conventions for the text of the links will be established, applied to existing content, and will serve as a way to encourage consistency going forward. Similarly, the editorial comments that appear in the resource will be revisited and guidelines will be created for when, or if, to add these.
- Scope statement. A scope statement will be created to establish criteria for when and what kinds of additional web resources are added. The creation of this statement will then allow the Editorial Group to create a submission process for users to recommend new content.
- Link order. Consideration will be given to the order in which the links appear in each sub-category. This section-by-section review will hopefully improve usability and result in higher visibility of the more useful links.
- Search functionality. The site is currently utilizing the default Wordpress search functionality. However, a keyword query in the search box simply returns the top-level name of the page in which the term(s) appear. While this may not be a significant issue when searching for a specific resource (e.g. *Inkunablenzensus Oesterreich*), it is somewhat less useful when querying words that appear on multiple pages (e.g. *bindings*). At our request, the Web Team is investigating whether

there are any options available to customize this feature. Specifically, if it would be possible to include a snippet view of where the keyword(s) appear on the page in order to provide more context.

**Web Resources for the Rare Materials Cataloger Editorial Group:**

- Katelyn Borbely
- Laurence Creider (Advisory Member)
- Matthew Ducmanas (Editor)
- Brittney Washington (Advisory Member)

## Appendix C

### Revised BSC Charge

Clean copy (incorporating most suggestions in the marked-up copy, as of April 25)

[http://rbms.info/rbms\\_manual/standing\\_committees/#bibliographic\\_standards](http://rbms.info/rbms_manual/standing_committees/#bibliographic_standards)

## 2. Bibliographic Standards Committee

*Charge:*

- To serve as the ALA representative of rare book, manuscript, and other special collections librarians and curators in all matters involving standards for providing intellectual access to and bibliographic description of those collections;
- to provide a centralized forum for discussion of issues relating to special collections technical processing, such as description, cataloging, and provision of intellectual access;
- to propose and/or develop necessary standards, best practices, and tools to support these activities;
- to develop ALA positions on, and provide a continuing review of, bibliographic standards for special collections;
- to serve as the formal liaison between the special collections community and appropriate units within ALA as well as organizations outside ALA, such as bibliographical networks, for the establishment of bibliographic standards whereby the unique requirements of special collections may be addressed;
- to disseminate information pertinent to librarians and others responsible for providing intellectual access to special collections.

*Comment:*

The Bibliographic Standards Committee provides aegis to and works in concert with the RBMS Controlled Vocabularies Editorial Group, which maintains the content of and facilitates access to the RBMS Controlled Vocabularies. The Bibliographic Standards Committee and the Controlled Vocabularies Editorial Group work together to reach agreement on the major issues that CVEG identifies for discussion. The chair(s) of the Bibliographic Standards Committee serve as ex officio member(s) of the Controlled Vocabularies Editorial Group, and the chair(s) of the Controlled Vocabularies Editorial Group serve as ex officio member(s) of the Bibliographic Standards Committee.

In order to work effectively, it is important that this committee maintain active communication with bibliographic utilities (e.g., OCLC, SkyRiver, etc.), with comparable committees in other professional societies (e.g., the Society of American Archivists and the CILIP Rare Books and Special Collections Group), with other persons and groups who develop thesauri and other



cataloging standards for special materials, and with the Program for Cooperative Cataloging and various offices at the Library of Congress.

*Coordination:*

- With the RDA Steering Committee (RSC) and the ALA Committee on Cataloging: Description and Access about development of RDA guidelines, RBMS Policy Statements for RDA, or RDA application profiles.
- With ACRL about the publication of RBMS/BSC cataloging standards.
- With persons and groups responsible for developing and maintaining encoding standards for bibliographic metadata (e.g., the MARC Advisory Committee, the Library of Congress, and the ACRL/RBMS-ARLIS/NA-SAA Joint Task Force on Development of the Art and Rare Materials BIBFRAME Ontology Extension).
- With the Library of Congress about hosting Descriptive Cataloging of Rare Materials in Cataloger's Desktop.