Draft

Minutes (Draft)
Bibliographic Standards Committee
Virtual Meeting
Zoom, Wednesday, August 28, 2019
3:00 - 4:00 pm EDT

1. Approval of BSC meeting minutes, ALA Annual 2019
2. OCLC Member Merge guidelines: revised instructions for rare books (Ryan Hildebrand)
3. Experts Directory (Liz Adams)

Members present: Francis Lapka, Yale Center for British Art (chair); Liz Adams, Duke University; Katelyn Borbely, ProQuest; Amy Brown, Burns Library, Boston College; Brenna Bychowski, Beinecke Library, Yale University (ex-officio: Controlled Vocabularies Editorial Group co-editor); Valerie Buck, Brigham Young University; Kalan Knudson Davis, University of Minnesota; Matthew Ducmanas, Temple University; Alison Greenlee, Wayne State University; Jessica Grzegorski, Newberry Library; Elizabeth Hobart, Pennsylvania State University; Linda Isaac, Houghton Library, Harvard; Deborah J. Leslie, Folger Shakespeare Library; Rafael Linares, La Casa del Libro; Michelle Mascaro, University of California San Diego; Philippe Mongeau, Rare Book School; Honor Moody, Harvard Library (CC:DA liaison); Kate Moriarty, Saint Louis University (secretary); Iris O'Brien, British Library; Lauren Reno, Duke University (ex-officio: Controlled Vocabularies Editorial Group co-editor); Jessie Sherwood, Robbins Collection, University of California Berkeley; Brittney Washington, Harry Ransom Center, University of Texas-Austin.

Visitors: Kira Barnes, Rochester Institute of Technology; Erin Blake, Folger Shakespeare Library; Ruth Carruth, Beinecke Library, Yale University; Ellen Cordes, Lewis Walpole Library, Yale University; Zoe Dobbs, Texas A&M University; Will Evans, Boston Athenaeum; Jane Gillis, Beinecke Library, Yale University; Rebecca Grabie, John Jermain Memorial Library; Ryan Hildebrand, University of Oregon; Eileen Horansky, Lewis Walpole Library, Yale University; Anna Loewenthal, Loyola Notre Dame Library; Jennifer MacDonald, University of Delaware; Danijela Matković, Beinecke Library, Yale University; Martha McTear, UC Santa Barbara; Audrey Pearson, Beinecke Library, Yale University; Treshani Perera, University of Kentucky; Arielle Rambo, Library Company of Philadelphia; Melissa Robohn; Noah Sheola, Burns Library, Boston College.

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

The chair opened the meeting with a welcome and the reminder that we will not have an in-person meeting at Midwinter 2020. The next in-person meeting will be at Annual 2020, prior to which we may have four or five virtual meetings.

The chair also repeated the call for a secretary to start July 2020. Those members with at least two years remaining in their term, or interested individuals who are not yet BSC members, can contact the chair and/or current secretary with questions or expression of interest. We hope to have a volunteer prior to Annual 2020 in order to provide a brief training and orientation.

1. Approval of BSC meeting minutes, ALA Annual 2019

The secretary thanked those who had made comments to the ALA Annual 2019 draft minutes and stated that all suggestions to the Google document were accepted. No additional feedback was given during the meeting. Tomorrow, the chair will post an updated version of the minutes to ALA Connect and call for a vote. [N.B. The updated ALA Annual 2019 minutes were posted to and approved in a vote that took place via ALA Connect between August 29 and September 5, 2019.]

2. OCLC Member Merge guidelines: revised instructions for rare books (Ryan Hildebrand)

This project came about after a few members of the rare materials community participated in OCLC's Member Merge training and noticed inadequate guidance for merging rare-materials records, with the potential consequence of unwarranted merging. When similar concerns were expressed on the DCRM-L list, the Bibliographic Standards Committee (BSC), with the ready agreement of OCLC, formed a group to augment with rare-book guidelines OCLC's training material, Merging duplicate book becords: A field-by-field comparison. The revision group is comprised of Ryan Hildebrand, Erin Blake, Michelle Mascaro, and Robert Maxwell.

Additional information was provided by those who participated in the training. Member Merge is a relatively new program whereby OCLC trains and authorizes individuals in merging duplicate bibliographic records. Up to 10 records at a time can be merged, with the former OCLC numbers included in the MARC 019 field of the retained record. One's institution forms part of a training cohort whose staff may get trained on one or more formats (books, cartographic resources, visual, etc.). Following training, a reviewer evaluates an institution's merges of at least 100 examples per format, after which the institution's staff has the authorization to conduct merges. Currently, OCLC permissions are not sophisticated enough to distinguish between formats, so an OCLC authorization with merge privileges can merge any format, regardless of degree of cataloger training across formats. It is up to individual institutions to regulate who may merge records for which formats and materials.

Prior to this meeting, the group submitted for comment to DCRM-L their Draft rare OCLC merge guidelines (see the August 28, 2019 version), based on the relevant sections of OCLC's Merging duplicate book becords: A field-by-field comparison. At this meeting, we were able to discuss some of the issues raised before running out of time.

Alerting participants to the need for rare-book experience. The revision group will explore the possibility of including a statement at the beginning of the document that alerts catalogers to the Rare Materials (pre-1801) provisions in the Exceptions section of the document. In the "Rare Materials (pre-1801)" section, they will add information on the need for familiarity with rare materials and rare materials cataloging in accurately determining whether two bibliographic records represent the same or different manifestations. There was also a recommendation to replace the section's first two phrases with "In these guidelines, rare materials are defined as books published before 1801 or books for which various rare materials cataloging rules are recorded as a code in 040 $e (e.g., bdrb, dcrb, or dcrmb)."

<u>Issues, states, and printings</u>. We may revisit this in a different forum but sentiment was leaning towards omitting any mention of issues, states, and printings. Since we would not be explaining the terms in any depth, they may be more confusing than helpful. Instead, we will rely on the merge instructions for the 250 field and the document's emphasis on reviewing note fields when making merge determinations. OCLC has given permission to consider separate printings as separate manifestations so it is possible that we will request a rare-materials exception to OCLC's Bibliographic Formats and Standards, chapter 4 [When to Input a New Record](#).

<u>Same manifestation, multiple records based on format</u>. We considered adding a guideline regarding a manifestation that has more than one bibliographic record due to different interpretations of its format. For example, a record for a manifestation described using DCRM(B) rules and the Books workform and a separate record describing the same manifestation using DCRM(G) rules and the Visual Materials workform. We decided not to include this information as OCLC does not allow multiple records for the same manifestation.

<u>MARC 245</u>

We will suggest the following changes to the existing language: 1) transcriptions in $a and $b should match in words and spelling; 2) different cataloger decisions regarding where the title proper ends does not disqualify records from being merged; 3) change "author(s)" to "name(s)" in the instruction on $c to read "Subfield $c, if present, should have the same names(s)."

In the added "Rare books" section, we will clarify that early printed materials often have misprints in the material itself, which means it is not safe to assume that what may look like a cataloger's typo, is indeed a cataloger's typo.

<u>MARC 250</u>. We will suggest the following change to the existing language: Change "Should match exactly" to "Should match, but allow that practices regarding abbreviation have changed over time." We did not quite finish the discussion on the instruction regarding named editions (second bullet point) but so far are leaning towards leaving the instruction as is and trusting that information disqualifying a merge would be captured elsewhere in the record.

The chair noted the complexity and importance of this project and thanked the revision group for its work. BSC will continue engagement on the draft in the near future. Until then, we were asked to consider whether we want to contribute to other Member Merge guidelines for which a DCRM module exists. Additional Member Merge guidelines can be found [here](#).

3. Experts Directory (Liz Adams)

The following report was submitted for discussion at this meeting: https://drive.google.com/file/d/1w8yYJzEF0pF5k3Le1PGd0XtZG4KmmV4h/view. However, due to time constraints, discussion was postponed until the next meeting.

The chair extended the length of the meeting by 15 minutes for those who could stay. The meeting closed at 4:15 pm EDT.

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