Draft RBMS Executive Committee Agenda

ALA Midwinter Meeting 2016, Boston, MA

Monday, January 11, 8:30 - 11:30, Westin Copley Plaza, Essex Room South

Please note that chairs of committees, discussion groups, and task forces, as well as liaisons to other groups and organizations give their reports at the RBMS Information Exchange (Sunday, January 10, 4:30 pm – 5:30 pm Boston Convention and Exhibition Center, Room 156C.

However, committee chairs are expected to attend the Executive Committee meeting, and they may present action items for consideration by the Executive Committee. All other members of RBMS are encouraged to attend the meeting and to participate in the discussion.

Please note:

We will break twice during the meeting as scheduled below:

9:00 – 9:15 am Mark Emmons, Associate Dean of Public Services, University of New Mexico and candidate for the position of ACRL Vice President/President Elect.

9:45 – 10:00 am (time approximate) ACRL Liaison, Julia Gelfand report

Draft Agenda

1. Introductions / Attendees

2. Review and finalize agenda (Cherry Williams)

3. Meeting protocol (Cherry Williams)

4. Approval of minutes from ALA Annual 2015 (Cherry Williams)

5. Reminders for committee chairs
   5.1 Meeting schedule, meeting room setups (Cherry Williams)
   5.2 Information Exchange reports (Beth M. Whittaker)
   5.3 Appointment of committee meeting recorders (John Overholt)

6. Consent Agenda

7. Updates from the Executive Committee (Cherry Williams)

8. Old business
   8.1 Role of RBMS Liaisons to external organizations (Cherry Williams)
   8.2 Clarifying and improving communication about expectations of Committee Chairs (Cherry Williams)
8.3 Committee membership requirements -- Alignment of “RBMS Obligations of Committee Members” (http://rbms.info/rbms_manual/standing_committees/ with ALA/ACRL 3.5.3 ACRL Guide to Policies and Procedures. (Cherry Williams)

8.4 Nominating Committee procedures (Fernando Peña)

8.5 Scholarships Committee (Melissa Nykanen)

9. New business

10. Programs and conferences

10.1 2016 Conference Program Planning (Coral Gables) (Lori Dekydtspotter & Aislinn Sotelo)
10.2 2016 Conference Local Arrangements (Coral Gables) (Cristina Favretto)
10.3 2016 Annual Conference Program Planning (Orlando) (Will Hansen)
10.1 2017 Conference Program Planning (Iowa City) (Melissa Hubbard & Julie McLoone)
10.2 2017 Conference Local Arrangements (Iowa City) (Greg Prickman)
10.3 2017 ALA Annual Conference Program Planning (Chicago) (Jason Dean)

11. Task forces

11.1 Task Force on the Development of Standardized Holdings Counts and Measures for Archival Repositories and Special Collections Libraries (Martha O’Hara Conway)
11.2 Task Force on the Development of Standardized Statistical Measures for the Public Services of Archival Repositories and Special Collections Libraries (Christian Y. Dupont)
11.3 Task Force to Review Competencies for Special Collections Professionals (Jennifer MacDonald and Cherry Williams)
11.4 Task Force on the Development of Guidelines for Primary Source Literacy (Heather Smedberg)
11.5 Task Force to Review Guidelines on the Selection and Transfer of Materials from General Collections to Special Collections (Martha O’Hara Conway and Mark Greenberg)
11.6 Descriptive Cataloging for Rare Materials Task Force (Francis Lapka)

12. Publications

12.1 Publications and Communications (Katharine Carrington Chandler)
12.2 RBM (Jennifer K. Sheehan)
12.3 RBMS News Blog (Ethan A. Henderson)
12.4 Web Team (Elspeth Healey, Melanie Griffin, and Alison Clemens)
13. Standing Committees

13.1 Archivist/Records Manager (Marten N. Stromberg)
13.2 Bibliographic Standards (Nina M. Schneider)
13.3 Budget and Development (Mary A. Lacy)
13.4 Conference Development (Henry F. Raine)
13.5 Controlled Vocabularies Editorial Group (Jane F. Carpenter and James Ryan Hildebrand)
13.6 Diversity (Elizabeth Joffrion and Juli Marie McLoone)
13.7 Exhibition Awards (David Faulds)
13.8 Membership and Professional Development: Meghan Read Constantinou & Melanie Jean Meyers
13.9 2016 Nominating (Fernando Peña)
13.10 Scholarships (Melissa Nykanen)
13.11 Security (Lois Fisher Black)
13.11 Seminars (Sarah Horowitz)
13.12 Workshops (Jennifer MacDonald)

14. Discussion Groups

14.1 Collection Development (Marten N. Stromberg)
14.2 Curators and Conservators (Beth Turcy Kilmarx)
14.3 Digital Special Collections (Melissa Hubbard and Jason Kovari)
14.4 Manuscripts and Other Formats (Lisa Conathan)
14.5 Public Services (Julia Gardner and Sarah Horowitz)
14.6 Technical Services (Ann K. D. Myers and Melissa A. Torres)

15. ACRL

15.1 ACRL Board, Leadership Council (Julia Gelfand / Cherry Williams / John Overholt / Arvid Nelson) – 9:45 a.m.
15.2 ACRL Budget & Finance (E.C. Schroeder)

16. Closing business (Cherry Williams)
RBMS Executive Committee DRAFT Minutes
ALA Midwinter Meeting
Monday, January 11, 2016
8:30 a.m.-11:30 a.m.

Call to order
The RBMS Executive Committee meeting was called to order by Cherry Williams at 8:30 a.m.

1. Introductions / Attendees

Executive Committee
Cherry Williams (Chair, Indiana University), John Overholt (Vice-Chair/Chair Elect; Harvard University), Elizabeth Call (Secretary; Columbia University), Shannon Supple (Member-at-Large; UC-Berkeley), Beth Whittaker (Member-at-Large; University of Kansas), Elizabeth Joffron (Member-at-Large, Western Washington University), Arvid Nelsen (Past-Chair, University of Minnesota).

Guests
Reina Uhler (NEDCC), Carly Sentieri (Miami University of Ohio), Heather Smedberg (University of California, San Diego), Mary Lacy (Library of Congress), Lois Fischer Black (Lehigh University), Juli McLoone (University of Michigan), Melissa Hubbard (Case Western Reserve University), Sarah Horowitz (Haverford College), Jennifer Sheehan (Grolier Club), Anne Bahde (Oregon State University), Meghan Constantinou (Grolier Club), Nina Schneider (UCLA), Amy Brown (Harry Ransom Center, University of Texas), Eric Holzenberg (Grolier Club), Henry Raine (New York Historical Society), David Faulds (UC, Berkeley), Athena Jackson (University of Michigan), Jennifer MacDonald (University of Delaware), Kelli Hansen (University of Montana), Danielle Culpepper (Rare Book School), Deborah J. Leslie ( Folger Shakespeare Library), Jane Gillis (Yale University), Mark Greenberg (Western Washington University), Angela Dressen (Villa I Tatti, Harvard University), Audrey Pearson (Yale University), Lori Dekydstpotter (Indiana University), Jason Dean (Southwestern University), Diane Dias DeFazio (New York Society Library), Amy Tims (American Antiquarian Society), Brenna Bychowski (American Antiquarian Society), Colleen Barrett (Philadelphia Rare Books & Manuscript Company), Veronica Reyes-Escudero (University of Arizona), Jocelyn Karlan (Villa I Tatti, Harvard University), Francis Lapka (Yale University), E.C. Schroeder (Yale University), Christian Dupont (Boston College)

2. Review and finalize
No additions to agenda.
agenda (Williams)

3. Meeting protocol (Williams)

RBMS will use Robert’s Rules of Order.

4. Approval of minutes from ALA Annual 2015 (Williams)

The minutes were approved.

5. Reminders for committee chairs (Williams)

5.1 Meeting Schedule, Meeting room setups (Williams)

Williams asked chairs to report any issues regarding the meeting schedule or meeting room setups to her. There were no issues reported, Skype setups worked overall.

5.2 Information Exchange Reports (Whittaker)

Whittaker asked for Information Exchange reports as soon as possible to be incorporated into the minutes, and reminded chairs that draft or final minutes for ALA Annual meetings are also due to ASAP. RBMS Secretary Elizabeth Call will send a follow up email as a reminder.

5.3 Appointment of committee meeting recorders (Overholt)

Overholt suggested that selection of minute takers be made ahead of time prior to committee meetings versus at the meeting, having it so that the duty is rotated among all committee members. This could be included in the committee chair instructions.

A discussion followed and it was brought up that maybe a secretary role could be created on each of the committees; if duty is rotated it could be done in alphabetically order; and recorders should be identified in advance then day of meeting as to avoid always having the same person recording the minutes. Selection of recorder can be done in one of two ways, leave it to the committee chair or it could be an appointed position (such as secretary). The committee was reminded that if we do make it an official position it should appear on website, which requires setting it up with ACRL.

Action item: Overholt and Williams will come up with potential text for the “Information for Chairs” page on the RBMS website (http://rbms.info/committees/information_for_chairs/)
6. Consent Agenda (Williams)  
There were no Consent Agendas to approve.

7. Updates from Executive Committee (Williams)  
There were no updates from Executive Committee.

8. Old Business  

8.1 Role of RBMS Liaisons to external organizations (Williams)  
Williams will be following up on evaluating how RBMS Liaisons to external organizations are selected.

Discussion: It was asked whether we needed to start allotting more time for Information Exchange. However it is not as easy as that as it is a time slot issue on the ALA schedule. At Midwinter this year the shuttle buses stopped running at 6pm, which could have caused attendees to be stranded. It was asked whether Information Exchange could start at 4pm instead. Could it be that there were too many groups reporting at Information Exchange? It might be worth looking closely at the reporting mechanism, relaying more heavily on the minutes for these groups and focus more on the business of the section. Brief announcements could be made and the report could be put on the website. It was suggested that guidelines could be issued on how to report at Information Exchange to make reporting more focused and concise. Guidelines could also include in any guidelines that no dates be given in oral report. It was suggested that people could write reports that will appear in the minutes and have them only give a short summary at the Information Exchange with no more than two minutes each to cover a couple of highlights.
Action item: When Whittaker sends out draft agenda she will send out a bolded comment: “If you are reporting at Information Exchange these are the protocols we would like you to follow…” and then at Information Exchange we will keep time for each reportee.

8.2 Clarifying and improving communication about expectations of Committee Chairs (Williams)

Williams requested that the manuals be updated to add that ??????

It was stressed that to update the RBMS section manual was hard for one person, and that it might be better to have a group of people involved to share the work load as the section manual has not been updated for a number of years and is a big job. Work might be cut down if this was made an annual thing that committee chairs did and having the changes go through the Web Team versus going through the Vice Chair, which would make the changes timelier.

Discussion: Wording changes should come to the Executive Committee not to Web Team and recorded in the minutes. One example cited was when the Executive Committee expanded what could be done with the Leab money; another example was when the RBMS preconference became a conference as this affected a number of committees. It was pointed out that changes already approved by the Executive Committee can be made by committee chairs.

8.3 Committee membership requirements – Alignment of “RBMS Obligations of Committee Members” with ALA/ACRL 3.5.3 ACRL Guide to Policies and Procedures (Williams)

ALA policy states that to be on committees you do not have to have physical attendance at meetings but some RBMS committees require physical attendance at meetings. We need to align our committee obligations with what ALA is doing. It was asked what ALA’s specific language was regarding the attendance policy. ALA Language was reviewed (http://www.ala.org/acrl/resources/policies/chapter3#3.5.3):

3.5.3 Committee appointee responsibilities

- Be familiar with and understand the committee charge.
• Maintain membership with ALA and ACRL.
• Be willing and able to participate in the activities of the committee, support its mission or concern, and carry out assignments in a timely manner.

Williams stated that it was her understanding that attendance cannot be a requirement and asked whether there was a virtual member check box in the volunteer form.

In the past it was difficult to request Skype kits but that process seems easier, thereby making virtual attendance a real possibility. It was asked what would happen if all committee chairs requested Skype kits as a matter of course, would ACRL be able to support this? Whose budget does it come from?

Williams said that the process for requesting Skype kits is very easy and is done when we put in for room assignments.

Nelsen stated that Skype kits should not be a funding issue and does not come from the RBMS budget. One thing we do have limits on are microphones but has never seen a limit on Skype kits for a section. We might bump into something if all committees are requesting them, however it is worth trying.

It was asked whether we needed to keep the virtual category if we are moving to a virtual/physical environment.

*Action item:* Williams will ask about Skype kits and see what accommodations they can make for us and will follow up on the ALA language. She would like committee chairs to let her know, other than Leab, if physical attendance to meetings was needed and why.

It was pointed out that there are some instances where an official vote needs to be taken and a quorum reached, while this can be done virtually, it should be kept in mind.

It was stressed that language around attendance be made as clear as possible as it seems that most assume physical attendance is required and this could discourage those interested in becoming involved in the section who might not have funding to attend the meetings in person. Once it is clear what the policy is, this information should be communicated to the section as to dispel misinformation making it clear about attendance.
Nelsen on behalf of Pena: There was a call put out for individuals to nominate themselves or others, only two names were submitted that way. One of Pena’s suggestions was to send out emails earlier publicizing that we will be encouraging people to either self-nominate or nominate others in order to raise the profile that the Nominating Committee was looking for names this way.

It was commented that it was not surprising that only a few names came that way this first time as it will take a while.

The practice was commended and it was asked whether this nomination process should be documented somewhere.

It was recommended for people to draft language changes to document the new process and that the charge of the Nominating Committee might not have to be changed.

The committee was reminded that it could be presented in the charge as an option not as a requirement.

Action item: Nelsen will email an announcement about this process and requesting the call earlier, following Fernando’s suggestions. Nelsen will also make an announcement to this effect at Info Exchange in June.

Action item: Nelsen and Supple to review the language and present at ALA Annual.

Supple on behalf of Nykanen: She is grateful for the support of the Executive Committee in the revision of the process for selecting scholarship recipients. The Scholarships Committee is submitting two documents, “Guidelines for Selection of Conference Scholarships Recipients” and proposed changes for the conference scholarships portion of the RBMS website to be considered by the Executive Committee. There were four main areas where discussion happened among the Scholarship Committee: assessment of methodology; point system for diversity options (half point for identity and half for affiliation, a total of one additional point is possible) – at least 20 percent diverse members; LGBT consideration, overall committee felt racial and ethnic diversity should be kept for now; early career focus – mid to late career also welcome to apply if they meet the requirements – early career removed from language, should
emphasis be stronger on early or mid to late career – committee will review.

It was asked if the Scholarships Committee wanted the Executive Committee to move on this ASAP or would the committee prefer a public review. Supple responded by saying that the Scholarships Committee would like the Executive Committee to approve the changes because they need to move quickly to get ready for the RBMS 2016 Conference website and this cycle of the scholarships process. Williams pointed out that the RBMS Conference website goes live on January 24th so this should be voted on now by the Executive Committee.

*Supple made a motion to approve the two documents from the Scholarships Committee. Whittaker seconded. Motion was approved unanimously.*

The agenda was paused to hear the report from Julia Gelfand.

Gelfand reported on ACRL Leadership Council outcomes. They celebrated a successful ACRL 2015 conference, that contributed to a big spike in the membership and the budget, which seems to be part of a pattern where odd years are good, even years not as good. Budget and Finance and the Board need to study the issue of membership and how this could be made a more stable situation versus having spikes and low points – it is a two-pronged issue of recruitment and retention. Recently had a consultant meet with them and looked at from various perspectives in order to try and get at an answer of why people join organizations. ACRL both suffers and is strengthened by its affiliation with ALA. At the Leadership Council it was announced after the Board met that the national conference scholarships were successful in pushing the enrollment to 3,400 plus the virtual committees. The goal for this year’s national conference in Baltimore because of location is between 3,800 and 4,000. Feedback received from 2015 scholarship recipients made it clear that two things needed to be done, one was to make awards $100 higher (with a cap of $735) and an equal number of scholarships will need to be made in 2016 as were made in 2015 – there will be an increase in the cost of registration, it has not been determined exactly how much but it needs to happen in order to make these two things happen. ACRL congratulates RBMS on its successful scholarship fundraising and hopes we can do what we did last year.
The 2017 ACRL Planning Committee met yesterday under Jim Neal, the conference chair, and will soon be making a call for preconferences. Preconferences will be one full day, no longer a half day as it has been in the past. If RBMS wants to make a proposal we are invited to consider. Registration will start in the summer.

ACRL announced a new relationship with SpringShare, the LibGuide software, which will be rolled out in coming weeks. ACRL Sections will have assigned space. ACRL is currently creating procedures.

ACRL Editor of Choice has announced that there will be changes down the line and has unveiled a number of opportunities for publishers.

ACRL is noticing an update on job announcements, public and private institutions are posting jobs. Some are newly created positions and others replacements.

Gelfand apologized for errors made on the RBMS candidate slate, changes need to be made but print was already released. The ballot will be corrected.

Jackson, who is on the 2017 ACRL Planning Committee, will be at the conference in Baltimore and will be happy to report on that conference to the section as necessary. If the section would like to have a bigger presence to let her know.

Gelfand welcomed further comments or questions from others via email.

9. New Business

No new business.
10. Programs and Conferences

10.1 2016 Conference Program Planning (Coral Gables) (Lori Dekydtspotter and Aislinn Sotelo)
No report.

10.2 2016 Conference Local Arrangements (Coral Gables) (Cristina Favretto)
No report.

10.3 2016 Annual Conference Program Planning (Orlando) (Will Hansen)
No report.

10.4 2017 Conference Program Planning (Iowa City) (Melissa Hubbard and Julie McLoone)
No report.

10.5 2017 Conference Local Arrangements (Iowa City) (Greg Prickman)
No report.

10.6 2017 Annual Conference Program Planning (Chicago) (Jason Dean)
No report.

11. Task Forces

11.1 Task Force on the Development of Standardized Holdings Counts and Measures for Archival Repositories and Special Collections Libraries (Martha O’Hara Conway)
Rachel D’Agostino for Conway reported that the task force will be submitting a request to extend the task force at ALA Annual, they have already told SAA Council and a formal request will be made in May.

11.2 Task Force on the...
Development of Standardized Statistical Measures for the Public Services of Archival Repositories and Special Collections Libraries (Christian Dupont)

11.3 Task Force to Review Competencies for Special Collections Professionals (Jennifer MacDonald and Cherry Williams)

11.4 Task Force on the Development of Guidelines for Primary Source Literacy (Heather Smedberg)

11.5 Task Force to Review Guidelines on the Selection and Transfer of Materials from General Collections to Special Collections (Martha O’Hara Conway and Mark Greenberg)

11.6 Descriptive Cataloging for Rare Materials Task Force (Francis Lapka)

extension of their terms, and will also be making the same request to SAA Council in May. Drafts will be available for comment this summer for ALA Annual and SAA Annual.

MacDonald reported that the document will go to Executive Committee before handing it over to ACRL Standards Committee. MacDonald asked for a time Executive Committee would like to see something by. Williams asked for it by the end of March.

No report.

Greenberg submitted the revised Guidelines on behalf of the Task Force, with a request that the Executive Committee conduct its vote as soon as it has had an opportunity to review the document.

Lapka reported that the task force will be requesting an extension.

12. Publications & Communications

12.1 Publications & Communications Committee (Katharine Carrington Chandler)

12.2 RBM (Jennifer K. Sheehan)

No report.

Sheehan reported that there have been low submissions and low subscriptions. RBM is moving forward with open access with
PCC now and will work its way down the line. She is concerned with what open access will do to print subscriptions (only have 390 subscribers now, 2/3rds of which are institutions). While they have a small budget from ACRL to help, how low is too low for print? ACRL has said that as long as print itself is self-sustaining with advertising they will allow us to continue producing print copies.

It was asked what the process was for new subscriptions to RBM. Sheehan said that ACRL can’t do anything currently to make the process for subscribing smoother, but they are working on it.

12.3 RBMS News Blog (Ethan A. Henderson)
No report

12.4 Web Team (Elspeth Healey, Melanie Griffin, and Alison Clemens)
Full report is online under Publications and Communications Committee, Web Team: http://rbms.info/committees/minutes/

13. Standing Committees

13.1 Archivist/Records Manager (Marten Stromberg)
No report.

13.2 Bibliographic Standards (Nina Schneider)
Schneider reported that they will be requesting money for indexing the two manuals coming out (cartographic and manuscripts)

13.3 Budget and Development (Mary Lacy)
The committee recommended funding added costs for the RBMS website to use HTTPs rather than HTTP, linked data hosting for Controlled Vocabularies, and additional postcard printing for the Diversity Committee, and to set aside funds from the section budget and profit shares towards the reprinting of Your Old Books once the final cost is known.

Nelsen made a motion to approve their requests, motion was seconded by Overholt. Vote in favor was unanimous. Motion passed.
The Budget and Development Committee started the discussion regarding a possible fundraising subcommittee.

**13.4 Conference Development**  
*(Henry Raine)*

The conversation about a possible fundraising subcommittee was also brought by Raine. Historically development is part of the Budget and Development Committee’s charge but wondered if it made sense to appoint a subcommittee.

Discussion: It was pointed out that there are a couple of different kinds of fundraising that needs to get done. There could be a subcommittee but it could be a lot of work if it encompasses all of those things. It was stated that this is the role that Budget and Development was charged with as part of its responsibility to think about financial issues of the section and fundraising is but one of them. An idea of a subcommittee is an important one as fundraising has become more and more important over the years. The role of a subcommittee is to support and coordinate between efforts and provide continuity of efforts and does not see a subcommittee as taking away from fundraising by other individuals, if help is needed the support function of a subcommittee is helpful. It was suggested that it might not need to be a subcommittee as much as a reoccurring line on the agenda. It was asked whether subcommittees had charges. Nelsen responded that subcommittees could have charges. Nelsen added that wording would be important and that we would need a charge if we were to move forward and suggested that this be made an agenda item for Annual.

There was a reminder that subcommittee charges do not have to be approved by the Executive Committee but can be submitted for evaluation and feedback.

Lacy will identify individuals already on the Budget and Development Committee if subcommittee was to be formed and solicit RBMS members with an interest fundraising who can then be brought into Budget and Development Committee. This will be an item on the Budget and Development Committee agenda and will report to the Executive Committee on how they think things are going.
13.5 Controlled Vocabularies Editorial Group (Jane Carpenter and James Ryan Hildebrand)  
As a member of the group working on a project to publish the RBMS Controlled Vocabularies as linked open data, Amy Brown represented the Controlled Vocabularies Editorial Group at the Midwinter Executive Meeting in Boston. She and two other CV members, Allison O’Dell and Amber Billey, are testing two possible content management systems as part of the project, one of which required asking the Executive Committee to approve funding for it ($10/month ongoing)–which the Executive Committee did earlier in the meeting. The group will be testing the two options this spring, and expects to be able to publish the Vocabularies as linked open data by Annual or late summer 2016.

13.6 Diversity (Elizabeth Joffrion and Juli McLoone)  
No report.

13.7 Exhibition Awards (David Faulds)  
No report.

13.8 Membership and Professional Development (Meghan Read Constantinou and Melanie Jean Meyers)  
Constantinou reported that the Membership and Professional Development Committee will be hosting at the RBMS 2016 Conference the RBMS Conference Orientation, New Members Meetup, and the Brownbag Lunch.

Constantinou shared highlights from the committee’s meeting at Midwinter.

13.9 2015 Nominating (Fernando Peña)  
No report.

13.10 Scholarships (Melissa Nykanen)  
No report.

13.11 Security (Lois Fischer Black)  
No report.

13.12 Seminars (Sarah Horowitz)  
No report.

13.13 Workshops (Jennifer MacDonald)  
No report.
14. Discussion groups

14.1 Collection Development (Marten N. Stromberg) No report.

14.2 Curators and Conservators (Beth Turcy Kilmarx) No report.

14.3 Digital Special Collections (Melissa Hubbard and Jason Kovari) No report.

14.4 Manuscripts and Other Formats (Erin Blake) No report.

14.5 Public Services (Julia Gardner and Sarah Horowitz) No report.

14.6 Technical Services (Ann K.D. Myers and Melissa A. Torres) No report.

15. ACRL

15.1 ACRL Board, Leadership Council (Julia Gelfand) Reported by Julia Gelfand above.

15.2 ACRL Budget and Finance (E.C. Schroeder) Reported by Julia Gelfand above.

16. Closing business None
The meeting adjourned at 11:15 am.
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Information Exchange

ALA Midwinter | Boston, MA
Sunday, January 10, 2016 | 4:30-5:30
Boston Convention and Exposition Center 156C

Moderator:
Beth M. Whittaker
RBMS Member-at-Large

Secretary’s Announcements
All who report at Information Exchange are asked to submit their reports to Elizabeth Call (elizabeth.call@columbia.edu) as soon as possible for inclusion in the Executive Committee minutes.

Chairs are also asked to submit draft or final minutes from ALA Midwinter 2016 by February 12, 2016.

Programming

2016 Conference (Miami) Lori Dekydtspotter and Aislinn Catherine Sotelo

2016 Annual Conference Program Planning (Orlando): William M. Hansen

Title: #BlackLivesMatter: Documenting a Digital Protest Movement

-Description: This program will focus on the #BlackLivesMatter movement, spurred by police shootings and other incidents across the country. This is a "hybrid" grassroots movement, with robust digital and physical presences. Documenting such movements for both short-term use by students and scholars and long-term preservation is a serious challenge for 21st-century libraries and archives. The program will explore the ways that activists, academics, archivists, and librarians are collecting and providing access to the history unfolding today.

-Moderator and speakers:

-Meredith Evans, Director, Carter Presidential Library and Museum
(Moderator)
-Meredith Clark, Assistant Professor, U. of North Texas, OR a co-investigator (Deen Freelon or Charlton McIlwain)
-Jarrett M. Drake, Digital Archivist, Seeley G. Mudd Manuscript Library, Princeton U.
-Makiba J. Foster, Subject Librarian for American History, American Culture Studies, Sociology, and Women, Gender, & Sexuality Studies, Washington U. in St. Louis
-Bergis Jules, University and Political Papers Archivist, U. of California-Riverside
-Budget: approved by ACRL; no additional funds requested from RBMS
-Co-sponsors: ALA Committee on Diversity; ALCTS Digital Preservation Interest Group
-Time: TBD; either Sunday, June 26, 1:00-2:30PM (preferred), or Saturday, June 25, 1:00-2:30PM (backup)

2017 Conference Program Planning (Iowa City): Melissa Hubbard and Juli McLoone

The 2017 RBMS Conference Planning committee held its first meeting at Midwinter, which was very productive. The theme for the 2017 conference is storytelling, and the tentative title is “The Stories We Tell.” The committee is still developing a vision for the conference, but it will certainly include an emphasis on experiencing Iowa City, taking advantage of its status as a UNESCO City of Literature, with such programs as the Center for the Book and the Iowa Writers’ Workshop. We are looking forward to developing this conference with the great local arrangements team at the University of Iowa, and we invite all section members to continue sharing their ideas with us.

2017 Conference Local Arrangements (Iowa City): Greg Prickman

Nothing to report.

2017 Annual Conference Program Planning (Chicago): Jason Dean

NEED REPORT
Committees & Task Forces

Archivist/Record Manager: Marten Stromberg

Bibliographic Standards: Nina Schneider

No report.

The Bibliographic Standards Committee met, as usual, on Saturday morning [January 9, 2016] with a total of 38 members and guests.

Descriptive Cataloging of Rare Materials (Cartographic) (DCRM(C)) is on the threshold of publication. A few minor corrections need to be made and the cover image and cover color need to be determined. We will likely approve the final publication before the end of this month and send it to Exec for a vote shortly afterwards.

DCRM for Music (DCRM(M)) is expected to be ready for a final, close reading by BSC by the end of the month so that it can be given to MLA (the Music Library Association) for the same. We will likely approve the final publication before the end of March and send it to Exec for a vote shortly afterwards.

DCRM for Manuscripts (DCRM(MSS)) is expected to be ready for a final vote – resulting in publication shortly thereafter – by Annual 2016.

Standard Citation Forms Used in Rare Materials Cataloging Subcommittee has received 13 new citation form proposals since Annual 2015. They have been tracking activity on the site and are happy to report that there have been over 2000 page views in that same period.

BSC is sponsoring 1 full-day workshop at the 2016 RBMS Conference: Applying DCRM(C) to rare cartographic materials, and 2 seminars: “Succession Planning for Rare Materials Cataloging: Challenges and Strategies” and succession planning and “Using RBMS Publications as Linked Data: An Introduction and How-To.”

Budget & Development: Mary Lacy

The Budget and Development committee met Saturday afternoon. We heard good news regarding the profit share from the 2015 Oakland conference (over $13,000!), and had a number of lively discussions, particularly regarding our continuing support of RBMS conference scholarships and possible expansion of the scope and extent of the scholarships. We will
continue a pattern of robust fundraising for scholarships, remembering that the money in our scholarship funds can continue from year to year, unlike the money from the profit share (and from the section's budget) which must be used up each year. We are aiming to raise $5000 from section members for scholarships, which benefits the section and the profession.

The committee recommended funding added costs for the RBMS website to use HTTPs rather than HTTP, linked data hosting for Controlled Vocabularies, and additional postcard printing for the Diversity Committee. It is expected that revisions to the Your Old Books pamphlet will be completed this year (with input from ABAA) and both ABAA and Rare Book school will be contributing to funding the next print run. The committee will recommend to Exec that $1000 from the section basic service funds and $1000 from the profit share be set aside for RBMS's share of the printing costs, as we await a request where the final costs are set forward.

In light of ongoing discussions about providing stable sources of funding for the ongoing needs of RBMS scholarships, conference funding, and other section needs which rely on more than the basic section budget, profit share, and the generosity of RBMS members, the committee will be initiating a discussion at the Executive Committee meeting regarding the establishment of a fundraising subcommittee.

The Conference Development Committee met on Sunday morning, with 24 people in attendance. The Committee is seeking proposals for the 2018 RBMS Conference, when ALA Annual will be in New Orleans. Although the Committee is particularly interested in proposals from New Orleans institutions or from institutions in the region, it will gladly accept and review proposals from institutions anywhere in the United States. Anyone who might be interested in hosting the 2018 Conference should contact Conference Development Committee Chair Henry Raine (henry.raine@nyhistory.org), who will gladly work with the proposing institution to develop a strong proposal for review by the Committee. During its meeting, the Committee also discussed procedures for revising and maintaining the RBMS Conference Planning Manual to make it more useful and easier to navigate by anyone involved in future conference planning.

The Controlled Vocabularies Editorial Group met Saturday, January 9, 2016 from 1:00 to 5:30 PM at the Westin Copley Place Hotel. Members Jane Carpenter (Co-Chair), Amy Brown, Amber Billey, Martha Lawler, Allison O’Dell, and Nina Schneider were present, as were volunteers Amy Tims and Brenna Bychowski.

The first portion of the meeting, which drew an audience of 30 Midwinter
attendees, consisted of a special presentation by committee members Allison O’Dell, Amber Billey, and Amy Brown on their project to publish the RBMS Controlled Vocabularies as linked open data, in which they discussed the publishing options they explored, drawbacks and merits of each, and proposed strategy for moving forward. O’Dell, Billey, and Brown have chosen two content management systems, TemaTres or Vitro, to test this spring, and since both systems are fairly similar, will make their selection based on usability factors. If selected, the Vitro option will require a $10/month ongoing charge, and the group’s request to the RBMS Budget and Development Committee for funding has been approved. The publication of Controlled Vocabularies as linked open data is expected to be completed by Annual 2016.

The remaining portions of the meeting were devoted to discussion of 20 new genre term scope notes, which will now be posted on the Controlled Vocabularies Discussion Blog for feedback from the rare materials community, and pending final review, will be added to the Controlled Vocabularies in the next web update. Since summer 2015, the CV team has added 122 new scope notes to the Genre Terms vocabulary, with 140 additional scope notes expected to be completed by summer 2016, for a total of some 260 new terms. Completed at Midwinter 2016 were scope notes for:

- Anti-Masonic literature
- Apocalyptic sermons
- Artillery election sermons
- Autobiographies
- Books for the visually impaired
- Captivity narratives
- Chants
- Christmas sermons
- Clippings
- Comedies
- Anti-Semitic literature
- Appointment books
- Auction catalogs
- Awards
- Broadside poems
- Carol books
- Charters
- Class notes
- Coloring books
- Comic books

Carpenter reported that after many years of discussion, the integration of the six thesauri, a project led by Co-Chair Ryan Hildebrand, is expected to finally be completed by summer 2016.

Carpenter also reminded Info Exchange attendees that the Controlled Vocabularies Editorial Group is now an independent RBMS standing committee, and no longer a subcommittee of Bibliographic Standards Committee, although CV continues to work closely in conjunction with BSC.

*The Descriptive Cataloging of Rare Materials Task Force met three times since Annual 2015: in November, in a brief special session held in conjunction with the annual meeting of the Joint Steering Committee for*
**Task Force: Francis Lapka**

Development of RDA, in Edinburgh; in December, for three days at the Lewis Walpole Library, Yale University; and three days at Midwinter, the first two of which were hosted by the Houghton Library, Harvard University. Though there remains considerable work still to do, the task force has probably now passed the halfway mark in its development of RDA-compatible guidelines for rare materials.

**Diversity: Elizabeth Joffrion**

1. Announced the Diversity 2016 Seminar Proposal was accepted. The session entitled, “Whose History Is It Anyway: Diversity and Outreach in Miami-area Collections” will focus on developing community partnerships related to Cuban, African American, and other communities.

2. The Diversity Committee engaged in a lively discussion related to the Scholarship Committee’s revised guidelines proposal. The committee was pleased to participate in the discussion leading up to the revisions and remains committed to support for expanding representation of underrepresented groups in RBMS through the scholarships process.

3. Announced that the Diversity Postcards were distributed to book fairs for a second year. A request was submitted to the Budget Committee to support additional distribution to library schools.

4. Seeking volunteers to implement priorities identified at ALA Annual 2015
   - Coordinate with ALA for career support and awareness (ex. Are there collaborative
   - Information programming opportunities for ALA that RBMS?)
   - Reach out to scholarship recipients and RBS fellows.
   - Create a Diversity Blog (or feature diversity on RBMS blog)
   - Site visits to MLIS programs in conference region. Reactivate Diversity Toolkit
   - Organize service projects.
   - Publicize the Diversity Committee beyond RBMS. Publicize Diversity statement

**Exhibition Awards: David Faulds**

The RBMS Exhibition Awards committee met to judge this year’s excellent group of submissions for the annual awards. Winners will be announced in the next few months. Attendees will be able to see all submissions at the RBMS Conference in Coral Gables while the awards will be presented in Orlando before Information Exchange. There are several openings on the committee this year so please apply if you are interested in serving.

**Membership & Professional**

The Membership and Professional Development Committee met with 24 committee members and guests at 8:30 am on Saturday morning. M&PD
Development: Meghan Constantinou and Melanie Meyers

will again sponsor the RBMS Conference Orientation in 2016, which will be similar to last year’s speed-dating format; as well as the brown bag lunch, co-sponsored with the Diversity Committee. Due to the nature of the venue, this year’s brown bag lunch will take the form of a few specially reserved tables at the boxed lunch scheduled for Wednesday afternoon.

We also discussed the status of our many ongoing projects. In particular, we discussed how we might archive and distribute the data collected by our recent member survey; made plans to review an updated version of the Career FAQ; and received comments on our new Dropped Member survey. Finally, we are pleased to report that, for the first time in recent history, we have a surplus of Mentors. Our mentee applications are down from last year, so we ask and encourage all RBMS members to spread the word.

Nominating 2016: Fernando Peña

The 2016 Nominating Committee is pleased to announce the following slate of candidates for RBMS leadership positions in the upcoming ALA and ACRL elections this April:

For RBMS Vice-Chair/Chair Elect:
Danielle Culpepper (Director of Budget and Finance, Rare Book School)
Athena N. Jackson (Associate Director, Special Collections Library, University of Michigan)

For RBMS Member-at-Large:
Katie Henningsen (Archivist and Special Collections Librarian, University of Puget Sound)
Heather Smedberg (Reference and Instruction Coordinator, Special Collections and Archives, UC San Diego)

The Committee would like to thank these outstanding candidates for their record of service and leadership and for agreeing to stand for election.

Publications & Communications Committee: Elspeth E. Healey for Katherine Chandler

Thirteen committee members and guests met on Saturday afternoon to discuss Publications and Communications Committee business. The processing of the audio recordings from the 2015 RBMS Conference is nearly complete, and these will soon be made available via the RBMS website. The Documentarian will coordinate with the Conference Development Committee to develop basic guidelines and instructions for the recording of conference sessions and the collection of presenter documents associated with the RBMS Conference. The goal is to codify and document this workflow to ensure that the process runs smoothly as each new documentarian steps into the role.
The founding moderator of the RBMS Listserv, Everett Wilkie, will be retiring from his position after over 20 years of service, and accordingly the Publications and Communications Committee is seeking a volunteer to serve as the new list moderator. A “Your Old List” subcommittee is working to explore and revise the posting guidelines for the RBMS Listserv. This group will be in communication with the Executive Committee and others to seek feedback on potential changes to the current posting guidelines.

In December, ABAA members provided feedback on the current revision of *Your Old Books*. Their textual edits were minimal, though they do suggest refreshing some design elements to make it even more appealing to booth visitors at book fairs. The committee will work to incorporate these suggestions and aim to reprint the revised brochure in time for April’s New York Book Fair.

*RBM:*
Jennifer Sheehan

The Editorial Board met at 8:30 a.m. on Sunday, January 10th. Four members of the Editorial Board attended, plus ACRL’s liaison.

A proposal to move toward an open access model for *RBM* has been approved by the Editorial Board and is now with the ACRL Publications Coordinating Committee for approval.

Reminder to those interested in volunteering to serve on the Editorial Board: you must fill out the volunteer form for ACRL, not RBMS.

Announcements regarding the Spring 2016 issue:

1. The theme is a special “digital vs. physical” issue
   a. We’ve received several submissions, but fewer of the “outside the box” ones than Jennifer hoped. We’ll extend the deadline until the end of February for these.
   b. Status of design/insert
   Jerry Kelly has designed both the cover and the special insert. The insert is being hand printed at RIT on the Kelmscott/Goudy hand press. ACRL has agreed to plastic wrap this issue for mailing, so that both the cover and the insert will be better protected. There will only be 600 copies printed, and people must subscribe to the print journal to receive one.

*RBMS News:*
Elspeth Healey
Ethan Henderson

Continued submissions of jobs, major acquisitions, and other RBMS-related news items are welcomed. Please submit your newsworthy items (via Word attachment) to the News Editor at news@rbms.info.
This year, the Scholarships Committee drafted criteria to be used for evaluating scholarship applications, as well as a set of guidelines and a methodology for guiding the selection process. The new criteria and guidelines have been reviewed by the Executive Committee, the Diversity Committee, and the Membership & Professional Development Committee Chairs, and will be voted on at Monday’s Executive Committee meeting. If approved, they will go into effect for this year’s scholarship cycle.

The Committee has also discussed whether the scholarships program should address other areas of diversity beyond racial and ethnic diversity, how the program might better serve both early career librarians as well as mid- to late career librarians, and new ways to use the scholarship recipients’ post-conference essays to promote the scholarships program. Finally, the committee is exploring a possible collaboration with Rare Book School to support the RBS Fellowship Program, which funds attendance at the RBMS Conference.

Applications for this year’s RBMS Conference scholarships are due March 25th, and recipients will be notified on April 22nd. The scholarships opportunity will be announced at the release of the conference website. Please promote it broadly!

The seminars committee met on Sunday at 1, with a mix of committee members and visitors. We reviewed the slate of seminars programming for 2016, which is 11 seminars, all but one of which have finalized speakers. The topics covered are a good mixture: cataloging, public services, management, collecting, etc. We also brainstormed ideas for possible 2017 seminars, with a wide variety of potential topics. We hope that many people will submit proposals (due June 3, CFP to go out in the spring), and are thinking about linking to the minutes in our CFP in order to give people a sense of some ideas they might consider if they want to submit a proposal.

Five members of the joint SAA-ACRL/RBMS Task Force on the Development of Standardized Holdings Counts and Measures for Archival
Repositories and Special Collections Libraries met on Friday 1/8/16 at the Countway Library of Medicine and met again on Sunday 1/10/16. For part of the latter meeting, the task force met with the two other joint task forces (Public Services Measures and Primary Source Literacy) to discuss progress and potential overlap. The meetings were extremely productive and the task force made significant progress toward streamlining counts, supporting data aggregation, and addressing digital materials. The task force plans to distribute beta-stage documentation for “level one” counts in time for ALA Annual 2016. Due to the unanticipated departure of one of its RBMS members, the task force currently has a vacancy. Interested members of RBMS should volunteer through the ACRL committee volunteer form by the February 15 deadline.

All ten members of the SAA-ACRL/RBMS Joint Task Force on the Development of Standardized Statistical Measures for the Public Services of Archival Repositories and Special Collections Libraries joined our meeting on Sunday afternoon, six in person and four via Skype. Eight visitors also attended, including some from the joint task force on primary source literacy. Visitors contributed actively to a lengthy discussion that served to validate the structure and approach of the draft standard that the public services task force has been developing through regular conference calls and online work sessions. The task force is aiming to have a completed draft by ALA Annual so that the task force meeting at ALA Annual can serve as an initial public hearing. In the meantime, a task force subgroup will continue compiling the results of the large-scale survey of public services statistical practices that it conducted last fall with the aim of releasing a report by ALA Annual. Task force members have also been active in proposing sessions about the development of the new standard at regional archives meetings and other conferences. During the last half hour of the meeting, members of the joint task force on holdings counts and measures came from their adjacent meeting room to share progress updates and other information.
Task Force to Review Competencies for Special Collections Professionals: Jennifer MacDonald and Cherry Williams

Task Force to Review Guidelines on the Selection and Transfer of Materials from General Collections to Special Collections: Martha Conway and Mark Greenberg

**NEED REPORT**

**Charge/Scope of Work**

ACRL policy requires each of its standards and guidelines be reviewed every five years. This task force is charged with reviewing the Guidelines on the Selection and Transfer of Materials from General Collections to Special Collections (3rd edition, 2008) and determine whether the guidelines should be (1) continued in force without change (2) revised to address current needs or (3) rescinded. If the task force determines a revision is necessary, it will draft a revision and keep the RBMS Executive Committee apprised of its progress.

**Timeframe**

Charged: July 1 2013 - 30 June 2015
Charge Extended: July 1 2015 - 30 June 2016

**Roster/Membership**

Martha O'Hara Conway (Co-Chair) University of Michigan
Mark Greenberg (Co-Chair) Western Washington University
Beth Turey Kilmarx (Member) Binghamton University
Jeffrey Marshall (Member) University of Vermont
Karla Nielsen (Member) Columbia University

**Process**

Shared with Invitation to Comment

- Public Discussion, ALA Midwinter, Chicago (1 February 2015)
- ACRL Rare Books and Manuscripts Section <rbms@lists.ala.org> (16 June 2015)
- ALCTS Preservation Administrators' Interest Group <padg@lists.ala.org> (16 June 2015)
- Public Discussion, ALA Annual, San Francisco (27 June 2015)
- CIC Heads of Special Collections <CIC-LIB-SPECIALCOLLECTIONS@cic.net> (30 June 2015)
• Announced with invitation to comment in *C&RL News* [http://crln.acrl.org/content/76/10/526.full] (November 2015)
• Public Hearing, ALA Midwinter, Boston (10 January 2016)
• Forwarded to RBMS Executive for approval (10 January 2016)

**Primary Changes to the Guidelines**

- Added “rarity and scarcity” as a category of criteria
- Eliminated the three appendices (by moving information into the document itself), including the examples
- Expanded the scope of the Guidelines to include options other than “transfer to special collections” -- such as offsite storage, medium-rare designation, and sheltering in place -- for providing secure, environmentally-sound storage and appropriately supervised use of rare and valuable materials

**Comments, Compliments, Etc.**

From Charlotte Brown, who chaired the Task Force that accomplished the 2008 revision:

Congratulations on a clearly written and comprehensive revision of the “Guidelines on the Selection and Transfer of Materials From General Collections to Special Collections” (Oct. 13, 2015 revision). I appreciate the Task Force's efforts to streamline the previous version (2008) and yet still retain the original 'spirit' and convey the appropriate level of urgency that these guidelines require.

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**Web Team:**

Elspeth Healey
for Alison Clemens

The RBMS.info site and social media platforms continue to grow, and resources and editing permissions for committees on the new WordPress platform continue to expand. To provide just a few examples, Audrey Pearson of the Bibliographic Standards Committee has nearly completed migration of the Latin Place Names File from the old RBMS legacy website. Bib Standards is also exploring options for the future of the Controlled Vocabularies. The Task Force to Review Competencies for Special Collections Professionals created a document using the digress.it WordPress plugin to enable outside review of their drafts. If you are a committee chair and you would like a committee editing account to edit the pages under your purview or require other Web Team assistance, please send an email to the editor@rbms.info email address. We rely on committees to review and update the content on their committee pages, so please also feel free to send any changes or updates to the editor@rbms.info account. For a more detailed discussion of Web Team business, please see the full 2016 ALA Midwinter Web Team report available
Workshops:
Jennifer MacDonald

Discussion Groups

Collection Development:
Jennifer Sheehan for Charlotte Priddle (who chaired meeting for Marten Stromberg)

- Charlotte Priddle stepped in to chair the DG after Marten Stromberg was unable to attend. This report was provided by Charlotte.
- There were around 22 attendees. Discussions focused briefly on highlights of recently added collections, and how these were publicized both internally and externally, and then moved on to the theme of collaboration and competition in collection development. Attendees talked about collaborations both within their institution and externally, with local/state-wide institutions. Questions were raised also around competing collection areas between institutions and the ethics of such issues.

Curators & Conservators:
Jennifer Sheehan for Beth Kilmarx and Charlotte Priddle

- Report on behalf of Beth Kilmarx & Charlotte Priddle, who are unable to attend.
- The attendance for C&C DG was very good, with a total of 30 attendees, including a significant number of preservation/conservation librarians. The area of discussion was focused solely on the issue of offsite storage for special collections. This topic raised healthy discussion, with attendees sharing experiences and asking for ideas and suggestions around issues of workflow, staff training, economic factors and preservation concerns around the travel and packing of materials in particular. From the discussion, this topic is certainly one of growing interest within the community, for both curators and conservators alike.

• Beth Kil Marx is rotating off after Annual, and the DG will be looking for a new co-chair with Charlotte Priddle.

Digital Special Collections
Melissa Hubbard and Jason Kovari

Did not meet

Manuscripts & Other Formats
Elizabeth DeBold for Lisa Conathan

NEED REPORT

Public Services:
Sarah Horowitz

The Public Services discussion group met on Saturday morning at 10:30 with 19 people in attendance. We had a lively discussion of digital projects and their influence on public services, including discussion of targeting projects at various audiences (scholarly, who may then look at other materials; K-12 students, who we may not serve in person). A discussion of the importance of copyright and permission to publish data surfaced from this conversation. We then turned our attention to discussing working with K-12 students. Several attendees had policies that did not allow students under a certain age (usually 16) to use collections or to do so only with a parent. However, attendees agreed that younger students are often very engaged and excited by our materials (sometimes in odd ways -- for instance, genealogy and naming origins), and many had had good luck in working with younger students despite the challenges, particularly for history day projects.

Liaisons to Other Groups

ACRL Budget & Finance: E.C. Schroeder

No report.

ACRL Communities of Practice Assembly:

NEED REPORT
The ABAA has been engaged in two projects related to RBMS since the 2015 Annual Meeting. After discussion of the “Your Old Books” brochure by the RBMS PubComm committee at the ALA 2015 Annual Meeting, the ABAA appointed a small subcommittee to review the text and suggest changes. Subcommittee members are ABAA members Vic Zoschak, Susan Benne, and Thomas Goldwasser. This group made some suggested changes to text which have been submitted to Katherine Chandler, the PubComm committee chair. The ABAA subcommittee also suggested taking a look at the design and images used in the brochure, and this suggestion has also been passed on to the PubComm committee for follow-up.

The ABAA is looking into the feasibility of a database of the collecting interests of special collections library staff with collection development responsibilities, to help match materials for sale with suitable institutions. A survey aimed at gauging the interest and willingness to participate of RBMS membership was recently sent to the RBMS and Ex-Libris listservs. The survey can be found at https://www.surveymonkey.com/r/85HG9PN.

The ABAA has two antiquarian book fairs scheduled for the coming months: the California Antiquarian Book Fair will be in Pasadena on February 12-14, 2016, and the New York Antiquarian Book Fair will be held on April 7-10, 2016. The ABAA will also continue their presence at the RBMS Conference at the Booksellers’ Showcase on June 21-22, 2016.
Museums: Elizabeth Call for Beth Kilmarx discuss how they handle controversial materials in the classroom, in the reading room, and in the exhibition case. A similar proposal was submitted by SAA CALM’s chair for the SAA 2016 conference.

CALM has been in conversation with ALA’s Membership Committee and ALA Membership Director exploring possibilities for membership and conference attendance incentives in order to get more crossover between the various LAM associations and conferences. Any initiative would be done as a pilot starting with student members. The incentives suggested are on the agenda to be discussed at ALA’s Membership Committee meeting here at Midwinter.

CALM is also looking into ways of supporting the Coalition to Advance Learning in Archives, Libraries and Museum’s initiatives.

CALM will be working on putting forth a draft resolution voicing concerns about the international destruction of cultural heritage.

Finally CALM is working on rebridging the relationship with the American Alliance of Museums (AAM) and is currently investigating ways to do this.

Government Documents Round Table (GODORT):
Elizabeth A. Sudduth

Maps and Geospatial Information Round Table (MAGIRT): Cathy Hodge for Margaret Gamm

During this Midwinter, members of the Map and Geospatial Information Round Table (MAGIRT) received a tour of the Norman B. Leventhal Map Center at the Boston Public Library on Friday, Jan. 8. In addition to the general collection, we also viewed the current exhibition, “Women in Cartography” and the stolen but recently returned Champlain map that was recently in the news.

Cathy Hodge provided updates regarding the activities of several committees during the conference. The GeoTech Committee & GIS Discussion Group discussed geocoding of historical data in maps, books, etc., including historic names & their alternatives. The Map Collection Management Discussion Group talked about using GIS to bring historical documents to life. U of MI had an undergrad project using GIS to analyze Jewish literature with the assistance of the Library’s Visualization Librarian. They also talked about the difficulty of storing paper maps, when to keep them and whether to keep them.
Coming up soon, MAGIRT will once again be hosting an Emerging Leaders team. The overall goal of the project is to design and implement an archiving program for MAGIRT using ALAIR, the American Library Association Institutional Repository. Some of the deliverables will include: a list of MAGIRT documents eligible for archiving; an archiving policy for MAGIRT; documented workflows for submitting legacy and current documents; and a number of MAGIRT documents archived to ALAIR, to serve as examples and a seedbed for future archiving projects.

With GODORT, we will be hosting a pre-conference workshop at Annual in Orlando on data visualization. This will be more of a hands-on workshop than the very popular presentation provided at Annual 2015 in San Francisco. More information will be available through the conference website or the MAGIRT website as we get closer to the conference.

A group of MAGIRT members will be working with team leader Carol McAuliffe to revise the 3rd edition of Guide to U.S. Map Resources and turn it into a map-based online resource. Steering Committee members for this project are Paige Andrew, Chris Kollen, and Kathleen Weessies. They will be looking for volunteers to build the online version in the near future.

On the broader topic of map librarianship, ongoing conversations regarding closing map collections or massive deaccessioning of maps may be of interest to RBMS members. Maps can be of immense research and monetary value, and as with rare books and manuscripts, digital reproductions aren’t always suitable for the same uses. Many printers, including the GPO, are no longer printing paper maps, so these resources are growing increasingly scarce. One project of interest is the creation of a CIC (Committee on Institutional Cooperation) collaborative geospatial data interface, which will also serve as the interface for digitized historical maps for CIC map libraries.

Society for the History of Authorship, Reading & Publishing (SHARP): Beth Whittaker for Diane Maher

The 24th annual conference of the Society for the History of Authorship, Reading & Publishing (SHARP) will be held in Paris, France from Monday 18 July to Thursday 21 July 2016. The conference theme: Languages of the Book will examine manuscript, print and digital cultures and the world of letter. Topics will include the languages of the book in translation, through the interplay of text and image, and as an agent in the evolution of new ways of reading. The conference will take place in the 13th arrondissement of Paris. Keynote lectures, panels, and most of the conference events will be held at the Bibliothèque nationale de France (BNF) and nearby at Bibliothèque universitaire des langues et
civilisations (BULAC). The conference will also feature excursions (soon to be announced) of special interest to book historians. Notification for conference papers is scheduled for mid-February. Registration information will be coming soon on the conference website.

Society of American Archivists (SAA): Beth Whittaker for Jackie Dooley

- A new series of instructional webinars on the fundamentals of web archiving has been launched. Cost is $189 for non-members, which can be for an assembled group.
- A curriculum for teaching a wide array of topics under the rubric of archival arrangement and description (i.e., collections processing and cataloging) is being designed. Not sure when it'll launch, as it was approved only in the last several months. It'll be similar in design to the Digital Archives Specialist curriculum that has existed for about years but will cover DACS, EAD, EAC-CPF, and other related topics.
- Helen Wong Smith, director of the Kaua'I Historical Society and a member of SAA's Council, presented a one-day workshop on cultural competencies to the Council earlier this year. SAA hopes to extend its availability to other segments of the membership. It covers a wide array of relevant issues, sort of diversity writ large. Could be interesting for RBMS to learn about and perhaps emulate.
- SAA has greatly increased its activity in production of issue briefs on topics related to archival advocacy. A few of potential interest to RBMS
  - Recommended qualifications for the next Librarian of Congress
  - Comments on the Copyright Office's proposed mass digitization pilot program
  - A letter to Facebook requesting that any page owner be permitted to download its content, which would enable web archivists to capture this material.

Association of College and Research Libraries Special Collections Working Group: Beth Whittaker for Diane M. Maher

Other
California Rare Book School: Susan M. Allen

Center for Bibliographic Studies and Research (CBSR): Brian Geiger

Diasporic Literary Archives Network: E.C. Schroeder

Grolier Club: Jennifer Sheehan for Meghan Constantinou

International Federation of Library Associations and Institutions (IFLA): E.C. Schroeder

RBS is now receiving applications for 2016 summer courses -- apply early! We received more than 60 applications on the first day they were available. 33 courses will be offered, both in Charlottesville and in Philadelphia at the Library Company of Philadelphia and the University of Pennsylvania. New courses, or courses that have not been run for some time include:

a. Peter Shillingsburg, Printed Books since 1800: Description and Analysis
b. Roger Chartier and John Pollack, Textual Mobilities: Works, Books, and Reading across Early Modern Europe (Penn)
c. and Michele Mulchahey, Seminar on Western Codicology

Submit your applications by February 29 to be considered in first-round decisions by faculty
By the end of this month we should be announcing fall 2016 courses in Washington DC and New York

2. Look out in the next week or so for a press release announcing a second cohort of IMLS-RBS Fellows. This group of 20 early-career librarians receive free tuition to RBS and attendance at the RBMS conference in Coral Gables.

3. As you may know, you can find audio for past RBS lectures on iTunes (search for Rare Book School). We continue to digitize lectures and grow the collection available online.

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### Acronyms

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<th>Acronym</th>
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<td>ABAA</td>
<td>Antiquarian Booksellers’ Association of America</td>
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<td>ACRL</td>
<td>Association of College and Research Libraries</td>
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<td>ALA</td>
<td>American Library Association</td>
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<td>ALA OITP</td>
<td>ALA Office for Information Technology Policy</td>
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<td>ALCTS/PARS</td>
<td>ALA Association for Library Collections and Technical Services Preservation and Reformatting Section</td>
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<td>APHA</td>
<td>American Printing History Association</td>
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<td>ARL</td>
<td>Association of Research Libraries</td>
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<td>BSA</td>
<td>Bibliographical Society of America</td>
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<td>BSC</td>
<td>ACRL/RBMS Bibliographic Standards Committee</td>
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<td>Joint Committee on Archives, Libraries &amp; Museums</td>
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<td>CalRBS</td>
<td>California Rare Book School</td>
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<td>DCRM</td>
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<td>Descriptive Cataloging of Rare Materials (Books)</td>
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<td>DCRM(S)</td>
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<td>GODORT REGP</td>
<td>ALA Government Documents Round Table Rare and Endangered Government Publications Committee</td>
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<td>IFLA</td>
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<td>LGBT</td>
<td>Lesbian, Gay, Bisexual &amp; Transgender</td>
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<td>MAGIRT</td>
<td>ALA Maps and Geospatial Information Round Table</td>
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<td>Online Computer Library Center, Inc.</td>
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<td>RBMS</td>
<td>ACRL Rare Books and Manuscripts Section; also IFLA Rare Books and Manuscript Section</td>
</tr>
<tr>
<td>RBMS-L</td>
<td>Rare Books and Manuscripts Section electronic discussion list</td>
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<tr>
<td>RBS</td>
<td>Rare Book School</td>
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<tr>
<td>RDA</td>
<td>Resource Description &amp; Access</td>
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<tr>
<td>RUSA</td>
<td>ALA Reference and User Services Association</td>
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<tr>
<td>SAA</td>
<td>Society of American Archivists</td>
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<tr>
<td>SAC</td>
<td>ACRL Standards and Accreditation Committee</td>
</tr>
<tr>
<td>SHARP</td>
<td>Society for the History of Authorship, Reading &amp; Publishing</td>
</tr>
</tbody>
</table>
Dear Colleagues,

The first in-person meeting of the ACRL/RBMS-SAA Joint Task Force on the Development of Guidelines for Primary Source Literacy will take place on Sunday, January 10 during the ALA Midwinter Meeting in Boston. The agenda, including meeting details are below. Visitors are welcome!

ACRL/RBMS-SAA Joint Task Force on the Development of Guidelines for Primary Source Literacy
ALA Midwinter Meeting 2015, Boston
Sunday, January 10, 2016
10:30 am-12:00 pm
Location: Boston Convention and Exposition Center; Room 259A
Visitors welcome!

1. Call to order
2. Select recorder for minutes
3. Introductions
4. Charge and scope of work
5. Discussion of draft definitions of Primary Source Literacy
6. Discussion of what our first draft should look like
   a. Devise work plan for accomplishing this work
   b. Timeline for work
7. Discuss communication and feedback plan
8. Other business?
9. Next Steps
10. Adjourn

Heather Smedberg
Co-Chair, ACRL/RBMS-SAA Joint Task Force on the Development of Guidelines for Primary Source Literacy
Reference & Instruction Coordinator
ACRL/RBMS-SAA Joint Task Force on the Development of Guidelines for Primary Source Literacy  
ALA Midwinter Meeting 2015, Boston  
Sunday, January 10, 2016  
10:30 am-12:00 pm  
Location: Boston Convention and Exposition Center; Room 259A  
DRAFT MINUTES

Visitors welcome!

Task Force members absent: Sam Crisp, Gordon Daines, Sammie Morris, Leah Richardson, Lisa Sjoberg.
Visitors: Emilie Hardman (Harvard University), Kate Hutchens (University of Michigan), Lois Fischer Black (Lehigh University), Elizabeth Williams-Clymer (Kenyon College), Amanda Rust (Northeastern University), Elizabeth DeBold ( Folger Shakespeare Library), Alena McNamara (MIT), Reina Uhler (NEDCC), Shannon Supple (University of California, Berkeley), Russ Taylor (Brigham Young University), Desiree Alaniz (Simmons College).

1. Call to order  
2. Select recorder for minutes (Landis)  
3. Introductions  
4. Charge and scope of work  
   - How inclusive can we be? Refine and focus on college/university students but don’t ignore other audiences; consider broader frameworks and curiosity about the past associated with variety of audiences.  
   - How to distill guidelines/standards from the existing literature that’s already out there on this broad topic.

5. Discussion of draft definitions of Primary Source Literacy (and primary source, and literacy)  
   - The group discussed problematizing literacy as a term:  
     - Literacy as a term could be seen by some see it as either all or nothing, when we know that’s not the case and we don’t intend to draw a line in our work between illiterate and literate states of being.  
     - Fluency, competency offered as alternatives to the term literacy. Look at current synonyms for ‘primary source’ and ‘literacy’ for alternatives.  
     - The term literacy is known and used in the field and faculty reach out to libraries wanting help teaching visual or information literacy.  
     - The concept of metaliteracies is also prevalent and different kinds of literacies are designed into the ACRL Framework.  
     - Faculty in many disciplines are comfortable with or at least conversant with the term.  
     - It will be important to acknowledge and address this problem of terminology in our draft documents  
     - Do concepts of literacy/facility work as well for rare books as they do for archives.
   - Crucial to have a statement on form in relation to primary sources.  
   - Primary sources are an overlapping venn diagram with lots of other kinds of literacies (visual, digital, etc.).  
   - Also have to foreground the relationship between disciplinary uses and the effectiveness of the use of primary sources.  
   - Sarah’s definition: relationship of primary sources and the discipline you’re working in.  
     - A lot of support for Sarah’s definition: “A person with primary source literacy has the knowledge, skills, and abilities necessary to effectively and efficiently find, interpret, evaluate,
and ethically use primary sources, with particular attention to the whole object, within the context and structure of the discipline in which they work and their research question.”

- Think about background skill set of engagement with cultural history. Get beyond coupling with “research question” and broaden the notion of questions and the role of questions in a more encompassing way. Non-linear relationship between questions and sources. How to deal with the notion of sources prompting questions.
- Primary source as a term is often associated primarily with special collections/archives. Our guidelines can’t speak just to our silos, but need to encourage collaborations and partnerships outside of special collections/archives - general and specialist librarians - faculty - etc.
- We want people to know how to use our collections, but we want/need to do something broader than just how to use special collections/archives.

6. Discussion of what our first draft should look like
   - Start with issues we’ve been discussing form vs. “primary source” and work outwards from there. Need to avoid staying at too generic a level, which might make these guidelines not actually useful on the ground. Break out knowledge, skills, attitudes. Draw connective line between guidelines and grounded needs of people who are trying to design instruction sessions.
   - Clear, concise scope at the outset of our guidelines will be important. Be careful not to go down too many rabbit holes.
   - Consider a 1-page extracted pull-out of key concepts that can be more widely circulated.
   - Consider Peter Carini’s conceptual organization as a way to organize our guidelines.
   - Need to help colleagues who teach when they start to reach out to faculty to discuss what they want us to do in sessions with their students.
   - Guidelines should help us to create learning outcomes and assessments so that we can feel confident that our interactions are successful.
   - Go through all subgroup reports and pull out concepts that we think are key/core/important elements, those that are more focused on learning objectives/outcomes, and those that inform a definition.
   - Important to map librarian/archivist ‘literacy’ points/notions to pedagogical goals from other disciplines (e.g., ‘how to do historical research’ from AHA articles).
   - Challenge to create definition/guidelines that can be applied to any form of information resource.
   - Where does object materiality fit in? Is it a key concept? Is it always important in primary source literacy or only when relevant to a particular project/question?
   - “Can’t have 20 core values” - be conscious of need to filter key concepts down to as concise a list as possible.
   - While the form of the document may logically follow the intellectual work of organizing ideas, it will be an iterative process and so Heather will create a brainstorming document - task force members can add thoughts on form as they work on early stages of compiling content/ideas.

7. Discuss communication and feedback plan
   - Orbis Cascade Alliance having symposium on teaching with primary sources in mid-March.
   - Morgan presenting in April
   - Tools for collaborative feedback on draft documents - Digress.it is no longer supported, CommentPress my be a viable alternative - HS will talk to RBMS Web Team about support tools
   - Once we have drafts in need of public comment, consider hosting a webinar to invite stakeholders to discuss the draft document

8. Other business? None

9. Next Steps:
   - Heather will create documents for 1) key concepts, 2) skills/goals/outcomes/objectives, and definitions and then let each TF member extract concepts.
   - Devise work plan for accomplishing this work
   - Timeline for work: Mid February deadline to have 4 documents and comment on them.
   - Get conf calls biweekly on our schedules through June - have one soon and then start up again in mid February.
● Task force use Sarah’s definition as working definition. Float it out there for feedback/comment while we’re moving forward with guidelines.
● Come up with a way to explore alternatives to ‘literacy’ as a term. Especially focus on non-librarian/archivist audiences - maybe just individual conversations?

10. Adjourn
Colleagues --

Please find below the agenda for our meeting at ALA Midwinter.

I invite you to join us for what we hope will be a lively and productive meeting!

Please do not hesitate to contact me with any questions regarding the work of the Task Force.

Thanks and looking forward -- Martha, on behalf of the SAA-ACRL/RBMS Joint Task Force on the Development of Standardized Holdings Counts and Measures for Archival Repositories and Special Collections Libraries

Alvan Mark Bregman (Queen's University) (RBMS)
Martha O'Hara Conway (University of Michigan) (RBMS)
Adriana P. Cuervo (Rutgers University) (SAA)
Rachel A. D'Agostino (Library Company of Philadelphia) (RBMS)
Lara Friedman–Shedlov (University of Minnesota) (RBMS)
Angela Fritz, Angela (University of Arkansas) (SAA)
Emily R. Novak Gustainis (Harvard Medical School) (SAA)
Lisa K. Miller (Stanford University) (SAA)
Katy E. Rawdon (Temple University) (RBMS)
Cyndi Shein (University of Nevada-Las Vegas) (SAA)

SAA-ACRL/RBMS Joint Task Force on the Development of Standardized Holdings Counts and Measures for Archival Repositories and Special Collections Libraries

Sunday 10 January * 1:00 – 2:30
Westin Copley Place * Adams

Agenda

1 Welcome
2 Introductions
3 Update on Work to Date
4 Discussion of Categories, Definitions, and Proposed Basic/Baseline/Level 1 Count
5 Next Steps
6 Joint Meeting with SAA-ACLR/RBMS Task Force on the Development of Standardized Statistical Measures for the Public Services of Archival Repositories and Special Collections Libraries.
SAA-ACRL/RBMS Joint Task Force on the Development of Standardized Holdings Counts and Measures for Archival Repositories and Special Collections Libraries

Sunday 10 January 2016 * 1:00 - 2:30 (ALA Midwinter Boston, MA)

Task Force Members Attending: Martha Conway (University of Michigan), Rachel D’Agostino (Library Company of Philadelphia), Angela Fritz (University of Arkansas) (recording), Emily Gustainis (Harvard University), Katy Rawdon (Temple University)

Guests Attending: Haven Hawley (University of Florida), Beth Kilmarx (Binghamton University)

Meeting Notes

Martha called the meeting to order and we all introduced ourselves.

Martha shared, and we discussed, the following from our very productive working meeting at the Center for the History of Medicine, Francis A. Countway Library of Medicine (Harvard University):

- “[Born] digital” and “microforms” are no longer considered categories/types of collection material (because all categories/types of collection material can be manifested as “digital” or “microform”).

- We revised the Level 1 Count to include “Intellectual Units” and “Space Occupied” only; “Space Occupied” was further characterized as “Physical Space Occupied” and “Digital Space Occupied.”

- We agreed that cubic feet will be used for reporting “Physical Space Occupied” except “Books and Other Printed Material,” which will be reported in linear feet. Physical space occupied can -- and will -- be measured in linear feet or in cubic feet, and converters and calculators can -- and should -- be used to convert linear feet to cubic feet when necessary for reporting purposes.

We will share and discuss these “breakthrough” decisions with the other members of the Task Force before we consider them “final.”

After the recap, Emily outlined a “to do” list which includes developing the following:

- A “Narrative” to accompany the “Level 1 Count” matrix/spreadsheet. It will explain the methodology as well as provide the rationale for certain decisions, including the preferred use of cubic feet; how the group defines “discoverable” collections, and why [born] digital and microforms are not considered categories/types of collection material)included in the counting categories. Martha volunteered to draft the narrative.

- The “Category Definitions” need to be revised to reflect the changes discussed above.

- A “Container Equivalency Chart”, which will be used as a reference tool to help participants convert measurements to cubic feet. Emily volunteered to existing conversion tools and create a master chart.

- An “Appendix of Examples” including sources of information. This will require the group to further develop well-rounded examples from government agencies, university archives, museums, and corporate/business archives.
- A “Quick Formats Reference List/Chart” as a visual guide for types of materials included in the collection categories. Rachel volunteered for this task.

These will be defined further and specific tasks will be finalized and assigned at our next meeting...

The group discussed a work timeline with a tentative deadline for the above tasks completed and a unified package ready by the first week of May. The goal is to circulate the Level 1 Count spreadsheet and supporting information in late May or early June to enable discussion, comment, etc. at ALA Annual in Orlando in June and at SAA Annual in Atlanta in August. At some point, most likely after the SAA meeting, we will want to invite some institutions to undertake a limited Level 1 Count, with the goal of having some feedback from that activity to inform our work going forward.

Emily suggested that we develop a set of “talking points” to standardize how we explain/answer questions re: method/approach.

Martha and Emily will keep the group posted on the status of our request for a one-year extension (to/for our work as a Task Force).

Martha will send out an invite for the next meeting, at which we will (1) report on our Friday and Sunday meetings (2) explain the revised Level 1 Count spreadsheet and (3) work on revising the category definitions. Additional assignments will be solidified during the next group meeting.

The group met for a short meeting with the Joint Task Force on the Development of Guidelines for Primary Source Literacy and the Joint Task Force on the Development of Standardized Statistical Measures for Public Services in Archival Repositories and Special Collections Libraries. We shared brief reports on the progress of their work. The entire group discussed the importance of standardizing language and terminology, whenever possible, across the guidelines, measures, reporting tools, etc.
ACRL/RBMS - SAA Task Force on the Development of Standardized Statistical Measures for the Public Services of Archival Repositories and Special Collections Libraries

ALA Midwinter Conference 2016, Boston, MA
Sunday, January 10, 1:00-2:30 p.m.
Location: Westin Copley Place hotel - Parliament Room

Members present: Christian Dupont, ACRL/RBMS co-chair (Boston College), Moira Fitzgerald (Yale University), Emily Hardman (Harvard University), Gabriel Swift (Princeton University), Bruce Tabb (University of Oregon), Elizabeth Yakel (University of Michigan)

Members who joined via Skype: Amy Schindler, SAA co-chair (University of Nebraska, Omaha), Tom Flynn (Winston-Salem State University), Jessica Lacher-Feldman (Louisiana State University), Sarah Polirer (Cigna Corporation)

Members who could not attend: None

Visitors: Anne Bahde (Oregon State University), Cynthia Etkin (U.S. Government Printing Office), Elizabeth Grab (University of North Carolina, Chapel Hill), Robin Katz (University of California, Riverside), Sara Logue (Princeton University), Fernando Peña (Long Island University, Palmer School), Heather Smedberg (University of California, San Diego), Mark Sweeney (Library of Congress)

Meeting Minutes (Draft)

Dupont convened the meeting at 1:00 and invited task force members and visitors to introduce themselves. Four task force members joined the meeting remotely via Skype. Dupont offered to take the meeting notes.

Due to the relatively large number of visitors, Dupont spent a few minutes providing background on the task force’s charge and progress to date. Discussion of the structure of the draft document followed, with visitors being asked what measures they use or would like to use in order to collect statistics pertaining to various aspects of public services, from reading room registration and circulation, to remote reference, reproduction requests, instructional outreach and exhibits, and website usage. The discussion served to validate the selection and descriptions of the principal domains addressed in the draft document as well as the definitions of basic and advanced measures for each domain. The task force will continue to flesh out the draft document in the coming months with the aim of making it available for comment by ALA Annual.

Schindler and Hardman reported on the progress they have been making on compiling the results of a large-scale (more than 300 responses) survey of a broad spectrum of special collections libraries and archival repositories conducted last fall. The report should be completed by ALA Annual.
Hardman also reported that she had proposed a session on the work of the three SAA-ACRL/RBMS joint task forces for the New England Archivists annual meeting along with Emily Gustainis (co-chair of the holdings counts task force) and Morgan Swan (member of the primary source literacy task force). The proposal was recently accepted. The meeting will be held in Portland, Maine, on March 31-April 2, 2016.

During the last half hour of our meeting, we were joined by several members of the joint task force on holdings counts and measures, who had been holding their meeting in an adjacent room. Co-chairs and members from all three task forces were thus present and used the time to share advice, progress reports, and other updates.

The meeting was adjourned at 2:30pm.
RBMS 2016 Conference Program Planning Committee Agenda

ALA Midwinter 2016, Boston, Saturday, January 9, 3:00-4:00 & 4:30-5:30pm

Westin Copley Place, Room Essex South

1. Welcome and introductions

2. Appointment of Recorder

3. Report from Local Arrangements

4. Report from Seminars

5. Report from Workshops

6. Sponsorship updates (Cherry and ACRL Rep)

7. Website launch and updates

8. Programming updates and break-out discussions
   a. Plenaries
   b. Short Papers
   c. Posters
   d. Participant-Driven Sessions
10. Onsite logistics

   a. Liaisons/onsite coordinators
   
   b. Recorders
   
   c. Social media

11. Adjournment of meeting

This meeting is open to anyone interested in attending. We look forward to seeing you in Boston!

Cheers,

Aislinn Sotelo and Lori DeKydtspotter

RBMS 2016 Program Planning Co-Chairs

Aislinn Sotelo

Director of Metadata Services

The Library | University of California, San Diego

t 858-534-6766 | e asotelo@ucsd.edu
Draft Agenda: 2017 Conference Planning Committee (Iowa City)
Co-chairs Juli McLoone and Melissa Hubbard

Westin Copley Plaza, Room Staffordshire
Saturday, January 9th
3:00-4:00pm and 4:30-5:30pm

Note: Skype Option Available: If anyone would like to attend virtually, please let Juli (jmcloone@umich.edu) or Melissa (melissa.hubbard@case.edu) know.

I. Call to order, Introductions, and Selection of Recorder
II. Report from co-chairs: conference vision & site visit update
III. Plenary speaker ideas / topics brainstorming
IV. Subcommittee break-out sessions
   A. Plenaries
   B. Participant-driven sessions
   C. Short papers & Posters
   D. Marketing
V. Subcommittees report
VI. Local Arrangements Update and opportunity for questions
VII. Review and comment on draft schedule
VIII. Matters arising
RBMS 2017 Conference Program Planning Committee (Iowa City) Minutes
ALA Midwinter 2016, Boston, MA
Location: Westin Copley Place, Room Staffordshire
Meeting Date: January 9, 2016 (Saturday), 3:00-4:00 and 4:30-5:30 p.m.

Attendees: Juli McLoone (University of Michigan), Melissa Hubbard (Case Western), John Overholt (Harvard), Karla Nielsen (Columbia), Charlotte Priddle (NYU), Danielle Culpepper (Rare Book School), Elspeth Healey (University of Kansas), Alison Clemens (Yale), Blynne Olivieri (University of West Georgia), Colleen Theisen (University of Iowa), Patrick Olson (Michigan State University), Robin Katz (UC Riverside), Cynthia Becht (Loyola Marymount), Curtis Small (University of Delaware), Joel Minor (Washington University), Timothy Shipe (University of Iowa), Margot Conahan (ACRL), Anne Bahde (Oregon State University), Shannon Supple (UC Berkeley), Jessica Pigza (NYPL), Elizabeth Joffrion (Western Washington University), Daniel Slive (Bridwell Library, SMU), Elizabeth Call (Columbia University), Katie Henningsen (University of Puget Sound), Margaret Gamm (University of Iowa), Jillian Sparks (Queens University), Sara Sterkenburg (Vanderbilt), Henry Raine (New York Historical Society), Colleen Barrett (PRB&M), Mark Danley (U.S. Military Academy Library)

1. Introductions and Selection of Recorder

The meeting was called to order at 3:00 by co-chairs, Melissa Hubbard and Juli McLoone. Introductions were made by those attending in-person and virtually. Blynne Olivieri offered to serve as recorder. Hubbard noted that people interested in serving on the Conference Program Planning Committee need to complete the online ACRL committee volunteer form by February 15.

2. Report from Co-Chairs

- Draft title: Tell Me a Story
- Iowa City is an UNESCO City of Literature
- Site visit was made in early November
- Currently, the plan is that most programming will take place on University of Iowa campus. The Bookseller’s Showcase will be offsite (an easy 10 minute walk) on Tuesday evening, and all day on Wednesday.
- Hotels are close to campus and near shopping

3. Plenary Topics Discussion

There will be 3 plenaries. Each plenary will feature two guest speakers and one moderator (the moderator will serve a traditional introductions-questions role).

Themes and subthemes include:
- Telling the whole story or interrogating the limitations of the historical record
• Research and stories in the archives
• How institutions tell their own stories
• Importance of storytelling in current American culture
• Memory
• What it means to publish or popular conceptions of authorship
• Telling the story as part of fundraising
• Indigenous peoples storytelling
• Transparency and sharing a painful institutional story in a positive way
• Storytelling and its link to library services and assessment
• Amateur and fringe press
• Narrative
• Myth and counteracting myth
• Voice and representation
• Responsibility and ethics
• Testing ideas through the physical embodiment of an object
• Story and practice
• Objects as narrative
• Music, folklife, folklore
• Digital narratives, and storytelling using social media
• Storytelling with students
• Students creating their own narrative using primary sources
• Stories that don’t occur on paper (song, oral histories, motion pictures)
• Engaging the senses in storytelling

4. Subcommittee Break-Out Sessions

There are 4 sub-committees: plenaries, participant-driven sessions, short papers and posters, and marketing. The chairs of these subcommittees are: Elizabeth Cole (participant-driven session), Joel Minor (short papers and posters), Juli McLoone (plenaries), and Katie Henningsen (marketing).

5. Subcommittee Reports

Subcommittee chairs reported in on their breakout sessions

• Participatory Programming Subcommittee suggested 6 session
  i. Story slam session modeled on The Moth -- participants would learn of the topic ahead of time and come with stories prepared
  ii. 90 minute “experiences” with various book arts topics (i.e. using the handpress, zine making process, papermaking, marbling, etc.)
  iii. Hands-on instructional session (like at the Bancroft last year)
  iv. Article or book discussion
  v. Service project -- two ideas discussed, one around finding a volunteer project like Books for Prisoners or seeing if City of Literature needed volunteers.
vi. Pop sessions -- unconferences, like SAA does -- Ignite sessions also suggested

6. Local Arrangements

Colleen Theisen (speaking on behalf of Greg Prickman, chair of local arrangements), gave a brief report and noted that the Center for the Book will be leveraged throughout the week.

7. Review of draft schedule

Brief discussion ensued. Noted that two hour lunch breaks are scheduled to allow for leisurely walking to and from restaurants.

8. Other Matters

Brief discussion. Meeting adjourned at 5:34.
1. Designation of recorder

2. Review/approval of 2015 Annual meeting minutes

3. Review of 2016 Annual Program proposal and speakers
   - Title: #BlackLivesMatter: Documenting a Digital Protest Movement
   - Description: This program will focus on the #BlackLivesMatter movement, spurred by police shootings and other incidents across the country. This is a "hybrid" grassroots movement, with robust digital and physical presences. Documenting such movements for both short-term use by students and scholars and long-term preservation is a serious challenge for 21st-century libraries and archives. The program will explore the ways that activists, academics, archivists, and librarians are collecting and providing access to the history unfolding today.
   - Moderator and speakers:
     - Meredith Evans, Director, Carter Presidential Library and Museum (Moderator)
     - Meredith Clark, Assistant Professor, U. of North Texas, OR a co-investigator (Deen Freelon or Carlton McIlwain)
     - Jarrett M. Drake, Digital Archivist, Seeley G. Mudd Manuscript Library, Princeton U.
     - Makiba J. Foster, Subject Librarian for American History, American Culture Studies, Sociology, and Women, Gender, & Sexuality Studies, Washington U. in St. Louis
     - Bergis Jules, University and Political Papers Archivist, U. of California-Riverside

4. Timeline, upcoming deadlines and next steps

5. Plans for promotion and coordination with co-sponsors

6. Other business?

Submitted January 2, 2016

Will Hansen, Committee chair
All,

Below is the agenda for the BSC meeting on Saturday morning. For those of you who may be interested, there will be a special presentation Saturday, January 9, 1:00 - 2:30 pm during the ACRL/RBMS Controlled Vocabularies Committee* (meeting at the Westin Copley Plaza-- Empire) "Transitioning the RBMS Controlled Vocabularies to Linked Open Data: A Simple Model for Thesaurus Publishers."

Bibliographic Standards Committee
Saturday, January 9, 2016, 8:30-11:30 am
Westin Copley Plaza - Staffordshire

BSC Saturday meeting agenda

1. Introduction of members and visitors
2. Settlement of the agenda
3. Approval of Annual 2015 minutes
4. Updates from BSC Chair
5. DCRM(M): Descriptive Cataloging of Rare Materials (Music) (Lorimer)
6. DCRM(C): Descriptive Cataloging of Rare Materials (Cartographic)(Fell)
7. DCRM(MSS): Descriptive Cataloging of Rare Materials (Manuscripts) (Nichols)
8. Controlled Vocabularies Editorial Group (Carpenter/Hildebrand/O'Dell)
9. Standard Citation Forms for Rare Book Cataloging (Barrett/Meyers)
10. BSC-sponsored RBMS Conference programs
   (2016) - Coral Gables, FL
      1. Workshop: DCRMC (Fell)
      2. Seminar: Succession planning (Isaac/DeZelar-Tiedman)
   (2017) - Iowa City, IA
      Proposals due June 3, 2016
11. CC:DA Report (Haugen)
12. Report on OCLC and Rare Materials Survey (Perry)
13. DCRM Task Force (Lapka)
14. TF to Explore Data Elements for Rare Materials (O'Dell)
15. Announcements from the floor
16. Adjournment

+-----------------
Nina M. Schneider
Chair, RBMS Bibliographic Standards Committee

Rare Books Librarian
William Andrews Clark Memorial Library
2520 Cimarron Street
Los Angeles, CA 90018
(323) 731-8529
nschneider@humnet.ucla.edu
http://www.humnet.ucla.edu/humnet/clarklib/
1. Introduction of members and visitors
2. Settlement of the agenda
3. Approval of Annual 2015 minutes
4. Updates from BSC Chair
5. DCRM(M): Descriptive Cataloging of Rare Materials (Music) (Lorimer) *
6. DCRM(C): Descriptive Cataloging of Rare Materials (Cartographic) (Kandoian) *
7. DCRM(MSS): Descriptive Cataloging of Rare Materials (Manuscripts) (Nichols) *
8. Controlled Vocabularies Editorial Group (Carpenter/O'Dell/Brown)
9. Revision of Standard Citation Forms for Rare Materials Cataloging (Barrett/Myers)
10. BSC-sponsored Preconference programs
   a. (2016) – Coral Gables, FL
      1. Workshop: DCRMC (Fell)
      2. Seminar: Succession planning (Isaac/DeZelar-Tiedman)
      3. Seminar: “Linked Data Consumption for the Rare Materials Librarian: An Introduction and How-To” (O'Dell)
   b. (2017) – Iowa City, IA
      Proposals due June 3, 2016
11. CC:DA Report (Haugen)
12. Report on OCLC and Rare Materials Survey (Folsom)
13. DCRM Task Force (Lapka)
14. TF to Explore Data Elements for Rare Materials (O'Dell)
15. Announcements from the floor
16. Adjournment

Appendix A: Linked Open Data Report of the Controlled Vocabularies Editorial Committee
Appendix B: Seminar Proposals
Appendix C: Report of the RBMS Liaison to CC:DA
Appendix D: Report on OCLC and Rare Materials Survey
Appendix E: Directory of Internet Resources: Additions January 2016

*Asterisk denotes agenda items that were reordered due to various issues.

1. Introduction of members and visitors

Members present: Nina Schneider, Clark Library, UCLA (Chair); Marcia Barrett, University of California Santa Cruz; Valerie Buck, Brigham Young University (Secretary); Jane Carpenter, UCLA (ex-officio: Controlled Vocabularies editor); Lori Dekydtspotter, Lilly Library, Indiana University; Christine DeZelar-Tiedman, University of Minnesota; Emily Epstein, University of Colorado, Health Sciences Library; Asheleigh Folsom, Georgetown
Visitors: Erin Blake, Folger Shakespeare Library; Katelyn Borbely, ProQuest; Morag Boyd, Ohio State University; Amy Brown, Harry Ransom Center; Annie Copeland, Pennsylvania State University; Diane Ducharme, Yale Beinecke Library; Nancy Kandoian, New York Public Library; Martha Lawler, Louisiana State University, Shreveport; Deborah J. Leslie, Folger Shakespeare Library; Megan McNiff, Harvard Houghton Library; Honor Moody, Harvard Schlesinger Library; Kate Moriarty, Saint Louis University; Ann Myers, Stanford University; Karen Nipps, Harvard Houghton Library; Iris O’Brien, The British Library; Phyllis Payne, Boston University; Katy Rawdon, Temple University; Elaine Shiner, Harvard Houghton Library; Stephen Skuce, Massachusetts Institute of Technology; Nicole Smeltekop, Michigan State University; Aislinn Sotelo, University of California, San Diego; Gioia Stevens, New York University; Elizabeth Sudduth, University of South Carolina.

Members absent: Ellen Cordes, Yale Lewis Walpole Library; Nancy Lorimer, Stanford University; Leslie Waggener, University of Wyoming

2. Settlement of the agenda

There were no adjustments to the agenda.

3. Approval of Annual 2015 minutes

The minutes were approved pending minor corrections.

4. Updates from BSC Chair

1. The DCRM Task Force was invited to present a morning session at the November 2015 JSC [now RSC1] meeting at the National Library of Scotland. They also presented a full-day seminar on RDA and rare materials. BSC and the DCRM Task Force look forward to working in the future with more international colleagues in some form of RSC Working Group for Rare Materials.

2. Thank you to Audrey Pearson who finished migrating Latin Place Names to the new RBMS platform.

3. Jason Kovari and colleagues at Cornell are putting together a grant to do data elements and ontologies, outlined in the report Schneider distributed before the conference on Linked Open Data. Kovari, et al., if funded, are interested in input from BSC. (The report is included below in Appendix A.)

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1 The Joint Steering Committee for the Development of RDA (JSC) is now the RDA Steering Committee (RSC).
7. DCRM(MSS): Descriptive Cataloging of Rare Materials (Manuscripts) (Nichols) *

Margaret Nichols reported that the editorial team received comments back from LC, CC:DA, and others. Reviewing these comments will be the focus of their meeting on Monday. Nichols asked about whether or not an index is needed because of the ease of online searching. Schneider strongly advised the inclusion of an index. Schneider will look into getting funds to hire an indexer.

The editorial team hopes to complete DCRM-MSS for a vote before Annual 2016.

6. DCRM(C): Descriptive Cataloging of Rare Materials (Cartographic) (Kandoian) *

Nancy Kandoian announced that DCRM for Cartographic was finished just two days ago. Color and image for the cover are still to be determined. The vote will be issued on ALA Connect by January 29th, followed by a consent agenda at Annual 2016.

Kate Moriarty asked about the inclusion of an index. Kandoian said that no index had been created. Schneider strongly advised the inclusion of an index, joined by a consensus from the room. Schneider will look into getting funds to hire an indexer. Deborah Leslie emailed contact information for an indexer to Schneider.

Allison O’Dell requested that DCRM manuals be uploaded online as chapters instead of as one long PDF so users don’t have to scroll down interminably for something several chapters in. Schneider will investigate.

The editorial team has been approved to present a workshop on DCRM(C) at the RBMS Conference 2016.

[N.B. The BSC voted 100% in favor of publication of DCRM(C) in polls that closed on January 26, 2016. The vote will be ratified on the consent agenda at Annual 2016.]

8. Controlled Vocabularies Editorial Group (Carpenter/O’Dell/Brown)

Jane Carpenter reported that the group has been meeting bi-weekly since Annual 2015. They are working to finish all terms lacking scope notes. Integration is projected to be completed by Annual 2016.

O’Dell and Amy Brown presented their Linked Open Data Report, summarizing the issues of publishing Controlled Vocabularies as linked data. (The report is included below in
Appendix A.) The desired result is to enable rare materials and special collections catalogs to integrate with and become discoverable on the Semantic Web. It is projected that publication as linked open data will also streamline library workflows (especially in authority control). The investigators studied three options for hosting CV and chose the RBMS.info site. They are now investigating TemasTres and Vitro (Jason Kovari at Cornell) as options. Investigators recommend that CV get its own sub-domain so it won’t overload the RBMS.info server.

Schneider asked whether either option will be sustainable by volunteers on the CV committee. O’Dell said that navigation and the administrative interface are simple to use; Cornell can help provide support as well.

Schneider asked if there is a way for the linked data to live in a MARC record; can you put URIs in a bibliographic record? O’Dell said that they will look into making this workable with the MARC environment.

Carpenter reminded the room that the CV editorial group is presenting their report in more detail at 1 p.m. today.

9. Revision of Standard Citation Forms for Rare Materials Cataloging (Barrett/Myers)

Marcia Barrett reported that the Standard Citations Forms (SCF) editorial team added thirteen new bibliographies to the SCF database since Annual 2015. Over a five-month period, there has been a monthly average of 475 users, 901 sessions, and 2020 page views on the web site.

The group also clarified the instructions for citing numeration in works with numbered entries, and added this to the web site.

The group received a request to put forth a proposal to update the MARC21 documentation for the 510 field. They decided to wait for the outcome of the proposal to the RSC on reference relationships in RDA (see Item 11).

Ann Myers stated that she can send an email once a month to the DCRM-L list summarizing new entries. Leslie suggested also putting updates on the RBMS News Blog.

Schneider advised the SCF team that Amy Tims might be able to help them develop a procedural workflow document, which can be added to the RBMS web site, for how to upgrade ILSs with the new forms.

[The committee took a 20 minute break]

5. DCRM(M): Descriptive Cataloging of Rare Materials (Music) (Schneider for Lorimer) *
Schneider reported for Nancy Lorimer. The main body of work was completed a few days ago. Lorimer is finishing the index. As the Music Library Association will be having a meeting in March, Lorimer hopes to have a close reading of DCRM(M) by late January or early February. Thus BSC members will be receiving assignments for this from Schneider via email.

10. BSC-sponsored RBMS Conference programs

(2016) – Coral Gables, FL

1. Workshop: DCRM(C) (Kandoian)

This will be a full-day workshop using the newly updated DCRM for Cartographic manual. Randy Brandt and Nancy Kandoian will be the instructors.

2. Seminar: Succession planning (Isaac/DeZelar-Tiedman)

This seminar is titled “Succession Planning for Rare Materials Cataloging.” The three invited speakers are Deborah J. Leslie, Folger Shakespeare Library; Lori Dekydtspotter, Indiana University Bloomington; and Colleen Barrett, Philadelphia Rare Books & Manuscripts Cataloging.

3. Seminar: “Linked Data Consumption for the Rare Materials Librarian: An Introduction and How-To” (O’Dell)

This seminar will be helpful for librarians in both the public side and cataloging side in demonstrating the use and benefits of linked data. (See Appendix B.)

(2017) – Iowa City, IA

A workshop spot has been reserved for the newly updated DCRM(M) manual.

BSC still needs seminar ideas for 2017. Schneider recommended to Nichols that she submit a proposal to Workshops and to Seminars for DCRM(MSS). O’Dell suggested a seminar on artist book thesauri; also one on contemporary artists materials. Schneider asked everyone to think of ideas and talk to her.

The deadline for proposals is June 3, 2016.

11. CC:DA Report (Haugen)

Matthew Haugen, RBMS liaison to CC:DA, reported that no new business from BSC/RBMS will be brought to CC:DA during Midwinter meetings. He predicted that BSC will likely bring the matter of Transcription vs Recording to CC:DA at Annual 2016.

Haugen reported that most proposals sent to RSC relating to rare materials were rejected or postponed. Those that were accepted are being refined into final versions and will likely
be published by April. The proposal seeking revisions to RDA to accommodate descriptions of referential works, such as Standard Citation Forms (in the 510 field), was not accepted, although issues were referred to the Relationship Designators Group. Haugen will be reworking this proposal by June 1st for resubmission.

Haugen also reported that RSC envisages establishing an Archives Working Group and a Rare Materials Working Group, both with international representation, to better address rare materials concerns in RDA in the future (see also Item 13).

Haugen invited everyone to the CC:DA meeting Monday morning to hear Gordon Dunsire, chair of RSC, speak about the evolving issues in RDA.

Haugen’s full report is included below in Appendix C.

12. Report on OCLC and Rare Materials Survey (Folsom)

Asheleigh Folsom reported on the survey she, Allison Rich, and Audrey Pearson conducted to discover how rare materials people (catalogers, researchers, vendors, curators, collectors, etc.) use institutional records in OCLC, and whether they have ever used LBD (Local Bibliographic Data). Several respondents did not know what an LBD is. Several serious concerns were raised by respondents that need to be presented to OCLC. (The report is included below in Appendix D.)

Schneider reminded everyone that the impetus for this survey came out of the discussion at Annual 2015 led by Jackie Dooley of OCLC. In this discussion, many concerns were expressed by special collections catalogers and librarians about the loss of copy-specific data when institutional records will no longer be available.

The survey received about 220 responses. Folsom asked the room for suggestions about how best to present the gathered information to OCLC. Suggestions included putting together the biggest concerns and questions into a paper to send to OCLC; OCLC can then prepare a response for Annual 2016. Another suggestion was to create a document including what the ideal solution is for rare materials people, carefully articulated, and couched in terms that don’t assume catalogers as the only audience.

Folsom asked for volunteers to collaborate with her on this document for OCLC. Interested individuals should contact her.

13. DCRM Task Force (Lapka)

Francis Lapka began by thanking Karen Nipps of the Harvard Houghton Library for providing space for TF meetings last Wednesday and Thursday.

Lapka provided more details about the RSC meeting in Scotland in November 2015. It is not known yet who will make up the envisaged Archives Working Group and Rare Materials Working Group. RBMS does not have a liaison to RSC, and the ALA representative will be
leaving (replaced by a North American representative). It is conceivable that members of RBMS will make up part of one or both of these new Working Groups, and thus the TF will be able to communicate RDA revision questions through these groups. It is not known yet exactly what these new groups will be asked to work on. The 2016 RSC meeting will be in Frankfurt, Germany, in November; its main thrust will be to get RDA accepted as widely as possible. Much of what RSC is discussing this year involves the models underlying RDA, such as an effort to consolidate FRBR and its sister models with authority data and subfields data. The specification of this consolidation, called the FRBR Library Reference Model, is anticipated to be issued during the first half of this year for review. Pat Riva, the Canadian representative to RSC, has published a paper discussing this, which Lapka recommends. Lapka also recommends that all interested attend the CC:DA meeting Monday morning to listen to Dunsire speak.

Lapka reported that one RDA issue that affects DCRM is in how to handle instances of transcription versus recording. In the next couple of years RDA will probably introduce several options for transcribing. Details are still emerging; Dunsire is still mulling it over. The TF is sending questions to Dunsire as they confront them.

Most RDA sections that the TF is dealing with are in the chapters on Manifestations and Items. Progress has been made, yet there is still more than half to get through. The TF charge expires in June 2016. Schneider asked how much longer Lapka thought the TF would need. Lapka suggested for a renewal of one year and consideration at the end of that year for how much more time is needed.

Leslie brought forward the issue of adding clarifying data in brackets in the bibliographic record, particularly in the date and place of publication fields. The concern is whether this interpolation should happen in the actual field or whether to add it only in a note. Discussion ensued about what impact future technical maneuverability and displays will have on this issue, especially with MARC eventually becoming obsolete. This conversation will continue on DCRM-L.

14. Task Force to Explore Data Elements for Rare Materials (O’Dell)

Allison O’Dell reminded the room that the TF has been charged with identifying data elements used by rare materials catalogers. This information, once collected and analyzed, will hopefully better inform future schemas. The TF has compiled a list of thesauri, controlled vocabularies, and data standards. O’Dell read the list and added more suggestions from the room. If the TF is ready by Annual 2016, Schneider asked them to report on what the recommended next steps will be.

15. Announcements from the floor

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Several open positions were announced.

16. Adjournment

Schneider adjourned the meeting at 11:13 am.

--Respectfully submitted by Valerie Buck, RBMS Bibliographic Standards Committee Secretary.
INTRODUCTION

Publication of the RBMS Controlled Vocabularies for Use in Rare Book and Special Collections Cataloging (RBMS-CV) as Linked Open Data will enable rare materials and special collections catalogs to integrate with and become discoverable on the Semantic Web. Publication as Linked Open Data will also streamline library workflows -- especially reducing the labor in authority control -- and support broader initiatives in the library profession, such as BIBFRAME.¹

At the 2015 ALA Annual Conference and Exhibition, the RBMS Controlled Vocabularies Editorial Group charged a working group to investigate and recommend a solution for publication of the RBMS Controlled Vocabularies as Linked Open Data. This document summarizes the findings of the working group (Amber Billey, Allison Jai O'Dell, and Amy Brown, in consultation with Jason Kovari), and presents a solution for management and publication of library thesauri as Linked Open Data, within the context of a collaborative and dynamic editorial workflow.

Summary of recommendations:

- Host and publish the Controlled Vocabularies on a new domain or subdomain
- Migrate to a Linked-Data-friendly Content Management System
- Create meaningful Linked Open Data during the editorial process
- Provide multiple points of access to the Controlled Vocabularies as Linked Open Data, including a human-readable, searchable, and browsable front-end interface, data export options in Linked Data formats, a SPARQL endpoint, and periodic data dumps to the Library of Congress Linked Data Service.

BACKGROUND

The RBMS Controlled Vocabularies

“The Controlled Vocabularies for Use in Rare Book and Special Collections Cataloging, [is] developed and maintained by the Bibliographic Standards Committee of the Rare Books and

¹ For an explanation of BIBFRAME, see: http://www.loc.gov/bibframe/
Manuscripts Section (ACRL/ALA). [The] thesauri provide standardized vocabulary for retrieving special collections materials by form, genre, or by various physical characteristics that are typically of interest to researchers and special collections librarians, and for relating materials to individuals or corporate bodies.2

Linked Data

Linked Data refers to a set of principles that confer machine-actionable, semantic meaning to data using Web technologies. This is achieved with the Hypertext Transfer Protocol (HTTP) for data communication, Uniform Resource Identifiers (URIs) for a kind of authority control, and a simple, three-part data structure known as a triple (specified by the Resource Description Framework, or RDF3). A brief explanation of the principles and mechanics of Linked Data is given below. Benefits of Linked Data include connected information networks, ease of data merger, knowledge inferencing, search engine optimization, and more.4

The World Wide Web has historically relied on Hypertext Markup Language to encode and link documents. HTML encoding results in content that is semantically meaningful to humans, but not to machines. For instance, in an HTML document, the statement:

\[ \text{<p>John Steinbeck is the author of <i>The Grapes of Wrath</i>.</p>} \]

can be interpreted by a human as semantically meaningful pieces of information (e.g., that John Steinbeck is a person and a writer, who authored a book called The Grapes of Wrath). Humans use context and semantics to derive information from this statement -- but machines must rely on mark-up formats to interpret data. HTML mark-up supplies formatting information alone. Linked Data formats supply the context and semantics that machines need to understand and use information. This is done by defining things with URIs and making assertions about them through relationships. Relationships are made explicit through the use of triples, which are three-part statements that contain a subject, predicate, and object, thereby relating the subject data to the object data. Using our example above, we could write the triple statement:

\[ \text{“John Steinbeck” “author” “The Grapes of Wrath”}. \]

And using URIs:

\[
\text{<http://viaf.org/viaf/96992551>}
\text{<http://schema.org/author>}
\text{<http://www.worldcat.org/oclc/289946>}. \]

This tells a machine unequivocally the same information and meaning that a human interprets in reading the original sentence.

2 http://rbms.info/vocabularies/
3 http://www.w3.org/RDF/
In order for triples to make sense to a machine, the subject and predicate data must be defined by a URI. Furthermore, these URIs should be stable in perpetuity and dereferenceable, meaning that information will be returned when a human user or robot accesses that URI.

The Semantic Web is the desired outcome of Linked Data implementation -- a Web where the data in documents is discoverable, connectable, and re-purposable. Using the simple triple structure and URIs, data can be understood and processed by machines, heterogeneous data sources can be merged, and new inferences can be made from combined data sets.

The Controlled Vocabularies can contribute to the Semantic Web by creating URIs for RBMS-CV concepts and by offering useful information in Linked Data formats when those URIs are dereferenced. Currently, the Controlled Vocabularies support human understanding of data and the relationships between data. Publication of the RBMS-CV as Linked Data will additionally enable machine understanding of the data contained, ultimately supporting such initiatives as BIBFRAME, automated resource description, global data integration, Web-based discovery, and the Semantic Web.

Impetus

A need arose for a new management solution to support production and publication of the RBMS-CV as Linked Data. The current content management system, MultiTes, is client-based and requires ongoing maintenance to publish new concepts. Static HTML pages are generated from a SQL database, and manually uploaded to the rbms.info site. We could upgrade to the MultiTes Online (cloud-based) version for a fee, however the hosting is maintained by MultiTes. This means that the vocabulary would reside at multites.org or on MultiTes servers. So, with MultiTes, there is no cloud-based option that will give us full control to manage the vocabularies. Most importantly, there is no way to openly query and access the metadata in MultiTes through the Web, as it does not have an API or SPARQL endpoint.

With the issues of MultiTes in mind, it was desirable to investigate other options -- especially considering the increase of open source Linked Data vocabulary services and software being developed by the library and information community.

Charge

A working group of the RBMS Controlled Vocabularies Editorial Team was charged to investigate and recommend a solution for publication of the RBMS Controlled Vocabularies as Linked Data. The group identified three primary options at the outset of the project. These options are outlined briefly here, in no particular order, and discussed in depth later.

- Allow the Library of Congress to host the vocabularies solely at their http://id.loc.gov

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5 [http://www.w3.org/standards/semanticweb/](http://www.w3.org/standards/semanticweb/)
authorities website. This option was attractive because it guarantees high visibility within the heavily-used and well-known Library of Congress network. However, it has significant workflow implications, and would necessitate RBMS losing some control of vocabulary maintenance.

- Host the vocabularies locally on a new subdomain, using either the software TemaTres or Vitro. This option allows for complete control to remain with the Controlled Vocabularies Group, but necessitates that we take sole responsibility for technical support.
- Partner with the Library of Congress Genre & Form Terms (LCGFT) and maintain the vocabularies only in partnership with the Library of Congress. We would serve in an advisory role as an expert community, but would not maintain oversight of the vocabularies.

**Metrics**

The solution must:

- Meet the research and cataloging needs of the rare materials and special collections community
- Allow publication of the RBMS-CV concepts as dereferenceable URIs in Linked Data format(s)
- Be simple enough for execution by a small volunteer organization

**INVESTIGATION**

The first route we considered was migrating the vocabulary to a central linked data vocabulary service. We contacted Nate Trail at the Library of Congress to explore moving the RBMS vocabularies to [http://id.loc.gov](http://id.loc.gov) -- the Library of Congress Linked Data Service (ID.LOC). ID.LOC would only be able to provide a front-end public access to the vocabularies. There is not web-based back-end management utility, and therefore it would not support the current RBMS workflows. As a result, it was recommended that we continue to maintain a separate instance of the vocabulary and send periodic data dumps to ID.LOC to publish the vocabularies through their service. While ID.LOC is not a one-stop solution for the RBMS vocabularies Linked Data problem, it will still provide a highly visible and accessible option for publishing and promoting the vocabularies. Duplication in two separate domains is not a concern as the terms can be linked with a sameAs relationship in their metadata.

Another option was to move the RBMS vocabularies to the Open Metadata Registry ([http://metadataregistry.org/](http://metadataregistry.org/)). After some consideration, this option was dismissed because it does not have the same management functionality as other tools so terms would have to entered manually/individually. We were also not confident in its lasting stability, since the RDA vocabularies no longer use it.
The last vocabularies service option considered was to merge the RBMS Vocabularies with the Library of Congress Genre and Form Terms vocabulary. We felt that this would be a tremendous loss of the unique RBMS vocabularies brand and product, and we cannot vote to dissolve ourselves.

With none of the Linked Data services meeting the desired requirements, we investigated software solutions to host and publish the Controlled Vocabularies ourselves.

SOLUTIONS

**Host and publish the Controlled Vocabularies on the rbms.info domain**

Currently, the Controlled Vocabularies are published at [http://rbms.info/vocabularies/](http://rbms.info/vocabularies/). Use of the rbms.info domain firmly establishes the identity of the RBMS-CV as an RBMS publication. To simplify the base URI pattern, we suggest using a subdomain, rather than a subdirectory -- that is, [http://vocabularies.rbms.info](http://vocabularies.rbms.info). The RBMS Web Team is aware of, and has approved, this change.

**Migrate to a Linked-Data-friendly Content Management System**

In order to publish the RBMS Controlled Vocabularies as Linked Data, it is prudent to use a content management system (CMS) designed for Linked Data formats and links to external resources. This will allow us to create rich data during the research and editorial stages. The working group has identified two platforms for managing the Controlled Vocabularies as Linked Open Data:

- TemaTres is a free, open-source content management system for knowledge organization systems (KOS) – such as library thesauri, taxonomies, ontologies, glossaries, and controlled vocabulary lists. TemaTres runs on a Web-server, and requires only PHP, MySQL, HTML, and CSS. The RBMS Web Team is prepared to run TemaTres in our existing hosting solution. Thus, using TemaTres requires no additional cost. Additionally, it is simple to install and straightforward to use.

- A major benefit of TemaTres is that back-end users can have varying privileges to add, edit, or suggest concepts. This facilitates the RBMS-CV workflow wherein the Editorial Group drafts concept documentation, and opens up these drafts for public comment. Currently, this workflow is facilitated by three tools (the MultiTes CMS, a pbworks wiki, and the RBMS Controlled Vocabularies Community Discussion). TemaTres would allow us to centrally manage this information and save time.

- Vitro was developed to support the VIVO project for connecting researcher information. Vitro is

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7 [http://rbms.info/cv-comments/](http://rbms.info/cv-comments/)
a generalizable RDF instance editor and can be configured for a variety of purposes, including thesaurus production. Vitro runs on a Java servlet, and would require an additional server environment at approximately $10/month.

Both TemaTres and Vitro provide a back-end administration and editing interface, as well as a front-end user interface for searching and browsing the Controlled Vocabularies. Both are cloud-based, and run on common Web technologies. Both will output to Linked Data formats (SKOS, JSON-LD, etc.) and both offer a SPARQL endpoint for querying the data. Both TemaTres and Vitro will aid the Editorial Team’s workflows and publication of the RBMS-CV as Linked Data.

Create meaningful Linked Open Data during the editorial process

Using either TemaTres or Vitro, output to Linked Data formats is seamless. And both CMSs will generate stable and dereferenceable URIs for concepts. However, the Editorial Team needs to choose a base URI pattern. We recommend either using the subdomain http://vocabularies.rbms.info/, or else choosing a new domain, such as http://www.rbmscv.org.

When the RBMS-CV data is migrated, existing relationships between resources (broader term, narrower term, related term, see, and see also) will be used to inform links within the Controlled Vocabularies. However, to create more beneficial, five-star Linked Open Data, which connects the Controlled Vocabularies with other Web resources, the Editorial Team should begin capturing links to external vocabularies. As part of the research process for each new RBMS-CV concept, the Editorial Team identifies related concepts in other vocabularies. We recommend capturing this data within the RBMS-CV Linked Data set. We also recommend reviewing existing concepts and adding links to external datasets -- in particular, the Library of Congress Linked Data Service and the Art & Architecture Thesaurus.

Provide multiple points of access to the Controlled Vocabularies as Linked Open Data

Access to the RBMS Controlled Vocabularies as Linked Open Data may be granted through several means. Both TemaTres and Vitro offer a human-readable, searchable, and browsable front-end interface, data export options in Linked Data formats, and a SPARQL endpoint.

Additionally, we recommend periodic ingest of the Controlled Vocabularies into the Library of Congress Linked Data Service (ID.LOC). This will increase exposure for and use of the RBMS-CV. But doing so will require maintenance of relationships between the RBMS-CV and the Library of Congress authorities and vocabularies. Since external links are already recommended (to produce five-star Linked Open Data), this activity is not a burden, but a bonus. Nate Trail at the Library of Congress recommended this approach, and is aware of our intention to submit data dumps to ID.LOC.

8 For an explanation of the five-star system, see: http://www.w3.org/DesignIssues/LinkedData.html
NEXT STEPS

1. Choose domain or subdomain and base URI pattern
2. Install test instances of Vitro and TemaTres
3. Assess usability of both tools and implement preferred option
4. Review and enhance links in existing data, including links to external vocabularies
5. Simplify Editorial Group workflow around the new CMS and to create five-star Linked Data.

CONCLUSION

Because both TemaTres and Vitro provide the necessary components for releasing the RBMS-CV as Linked Data, we recommend installing an instance of both on a newly established controlled vocabularies subdomain, which will necessitate an additional $10 per month hosting cost. The Controlled Vocabularies Editorial Group will test both software installations and implement the best option based on usability, ease of support, and overall functionality. Once an implementation decision has been made, we will migrate the latest data from MultiTes and dismantle the current rbms.info/vocabularies site. At this point, we will also begin work on developing the relationships necessary for five-star Linked Data.
Appendix B: Seminar Proposals

Linked Data Consumption for the Rare Materials Librarian: An Introduction and How-To

The English Short Title Catalog (ESTC) and the RBMS Controlled Vocabularies for Use in Rare Book and Special Collections Cataloging (RBMS-CV) are now published as Linked Data. What does this mean? And how can Linked Data formats empower the RBMS community to improve workflows, bolster discovery, and enhance research? This educational seminar will provide an overview of each publication and the benefits of its new data format, followed by practical (and accessible!) instruction for working with these publications as Linked Data. Examples will include cataloger tasks (e.g., linking to an external authority resource, ingesting contextual information), curatorial tasks (e.g., uncovering related material and collections, building connections and stories via raw data), and user tasks (e.g., discovering special collections material in search engines).

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Appendix C: Report of the RBMS Liaison to CC:DA

Report of the RBMS Liaison to CC:DA, January 2016

The CC:DA met during ALA Midwinter after the BSC meeting on Saturday, January 9 and again on Monday, January 11. The full agenda, with links to reports given during the meetings, is available here: http://alcts.ala.org/ccdablog/?p=2504

CC:DA activities since Annual 2015:
CC:DA formed a task force to review DCRM(MSS) and provided comments to the editorial team, as it did for all of the other modules, except (G).

2015 JSC/RSC Proposals and Activities:
Thank you to all who provided feedback during the past round of proposals considered at the JSC (now RSC) meeting in November 2015. Several proposals were out of scope for rare materials concerns. A summary of the outcomes is available in the report of the ALA Representative given at the CC:DA meeting.


Rejected/deferred/tabled proposals:

Those proposals and discussion papers which generated the most interest for rare materials concerns were either rejected due to lack of support among the RDA constituencies, or deferred to existing working groups, or tabled in anticipation of larger revisions to the RDA Toolkit structure or to the functional models underlying the instructions (consolidation of the FRBR, FRAD, FRSAD models under the Library Reference Model1). Details on the outcomes and actions related to these proposals will be published by the RSC Secretary at rda-rsc.org. Action on outstanding issues that were deferred or tabled may still move forward in the form of new proposals or working group charges in future proposal cycles.

1. 6JSC/ALA/45: Referential relationships: RDA Chapter 24-28 and Appendix J
This proposal was sponsored by the BSC. Outcome: Rejected. The RSC determined that referential relationships are not WEMI-to-WEMI relationships. Instead, this is a subject-like relationship between the manifestation or item being described and a separate description of it.

The WEMI-WEMI “Cross-entity” issue in Chapters 24-28 and Appendix J is being referred to RSC Relationship Designators Working Group. The forthcoming Rare Materials working group may continue work on other aspects of this issue. If needed, we will submit a follow-up proposal treating references as a type of identifier for manifestations and items, in RDA chapter 2.

2. 6JSC/BL/26: 2.7 Production Statement: changing method of recording
Outcome: Rejected in favor of developing a self-described vs. non-self-described approach.
Follow-up work: • Fast track proposal from the UK to redefine “inscription” and to add something

to production method (3.9.1.3) that uses this term. Anticipated for the RDA Toolkit April Update. Major revisions will need to be folded in to the expected redesign of RDA.

3. 6JSC/BL rep/2: Simplification of RDA 2.7-2.10 (Follow up to 2014 BL Rep proposal)
   Outcome: Action deferred, due to the JSC Working Principle. However, there was general agreement that RDA should be developed to include a new generic modeling solution for manifestations that clearly separates transcribed information from recorded data. This would include creating a second set of elements for manifestation-related recorded data. Follow-up work: The RSC Secretary will clarify RDA 1.4 (Language and Script) and RDA 1.7 (Transcription) regarding transcription and transcribed elements. The RSC will keep in mind the longer-term issues.

Accepted with modification:

Some of the proposals of more moderate interest were accepted with modification. The exact nature of those modifications won't be available until the RSC secretary publishes final versions at rda-rsc.org, and are not considered official until implemented in the RDA toolkit update in April 2016.

1. 6JSC/ALA/38: Create RDA 2.17.14, Note on Identifier for the Manifestation

2. 2. 6JSC/ALA/42: Clarify Sources of Information for Statement of Responsibility Relating to Title Proper (RDA 2.4.2.2, etc.)

3. 3. 6JSC/CCC/16: Transcription of punctuation and symbols (1.7.3, 1.7.5)

4. 4. 6JSC/CCC/18/rev: Recording numbering for a series (2.12.9.3)

5. 5. 6JSC/LC/32: Revision to instructions for devised titles in RDA 2.3.2.11

Discussion papers:
   Outcome: General agreement that: 1) RDA needs to support both machine-actionable and human-readable data. 2) Additional work on this project should continue.

The RSC also imposed a moratorium on relationship designator proposals. Proposals can still be submitted to the PCC Standing Committee on Standards (http://www.loc.gov/aba/pcc/scs/RD-Requests.html), or we can continue to use the RBMS relators.

Fast-track proposals:

Members of the DCRM Task Force and Controlled Vocabularies Committee advised the JSC on fast-track proposals to add new glossary definitions for scrolls and folded sheets, and also submitted a proposal to revise the glossary definition of double leaves. Substantial refinement to the proposed definitions took place in the review process, with our input. Final versions will be published by the
Governance and name changes:
The JSC (Joint Steering Committee) has been renamed the RSC (RDA Steering Committee). In an effort to represent international and specialist needs, the RDA Steering Committee will increase the number of specialist working groups including a new Archives Working Group and a rare materials working group, expand regional representation into new areas, and merge current representation of ALA, LC, and CCC (Canadian Committee on Cataloging) into a single North American representative to the RSC. While this adds to the distance between ALA/CC:DA and the RSC, the formation of the Rare Materials WG will probably give our community a more direct voice in the development of RDA in collaboration with international rare materials expertise. The representation of RBMS at the CC:DA level will nonetheless remain an important means of interfacing with other cataloging standards bodies (such as PCC, MARC Advisory Committee, etc.), and of evaluating proposals from other RDA constituencies.

Additional details on the governance changes can be found in the following reports from the ALA representative, Kathy Glennan: [http://alcts.ala.org/ccdablog/wp-content/uploads/2016/01/RDAGov-2016-01.pdf](http://alcts.ala.org/ccdablog/wp-content/uploads/2016/01/RDAGov-2016-01.pdf)


Dunsire also gave another presentation on Data capture and storage in RDA: [http://www.gordondunsire.com/pubs/pres/RDADataCap.pptx](http://www.gordondunsire.com/pubs/pres/RDADataCap.pptx)

2016 Proposal cycle:
There are not currently any new CC:DA proposals of rare materials interest under consideration by CC:DA for the upcoming proposal cycle (to be considered by the RSC in Frankfurt, November 2016), but as proposals arise from CC:DA or other constituencies between now and June, those with potential rare materials implications will be brought to DCRM-L for discussion.

Other future work:

MARC proposal for 510 field:

This proposal seeks to add subfields $2, $0, and $5 to MARC Bibliographic 510. $0 to indicate an identifier, $2 for the source of the citation form (and to establish a source code SCF), and $5 for institutional code in the case of copy-specific references.

Though this was begun in conjunction with the rejected RDA proposal, we are planning to follow through with this MARC proposal. Please contact me (matthew.haugen@columbia.edu) if you are interested in helping author this proposal.
Appendix D: Report on OCLC and Rare Materials Survey

Copy Specific Information in WorldCat Survey Report,  2015
RBMS Bibliographic Standards Committee ALA
Midwinter 2016 – Boston, Massachusetts
Saturday, January 9, 2016, 8:30-11:30am
Westin Copley Plaza - Staffordshire

SUMMARY
On behalf of the RBMS Bibliographic Standards Committee, Allison Rich (Brown University), Asheleigh Folsom (Georgetown University), and Audrey Pearson (Yale University) explored ways to help OCLC understand the need to share local and copy-specific information in WorldCat. We created a brief survey so we can provide feedback to OCLC on this topic with the help of the rare materials community. The survey was sent to various rare materials related listservs including DCRM-L, EXLIBRIS-L, SHARP-L, and AUTO-CAT in mid-October 2015. The survey was aimed towards rare materials librarians, but was not limited as such. Anyone in the rare materials community had the opportunity to respond, including vendors, booksellers, publishers, etc. However, the survey was anonymous and we did not collect any demographic or personal information from respondents. The first 8 questions were required while questions 9 and 10 were for further comments or suggestions. The survey officially closed on Friday, December 4, 2015 and received 220 responses to the required questions as outlined below.

MULTIPLE CHOICE QUESTIONS

Question 1: Do you create copy specific information for materials at your institution?

Answer: 90.45% of respondents said that they do create copy specific information
Question 2: Do you search for copy specific information for materials at other institutions?

**Answer:** 71.36% of respondents said they do search for copy specific information, while 27.73% said that they do not.

![Bar chart showing search for copy specific information](chart1.png)

Question 3: Do you use or have you used Institutional Records (IRs) in OCLC?

**Answer:** 44.55% of respondents said they do/have used IRs in OCLC, while 26.36% said they do not and 29.09% said they are unfamiliar with IRs.

![Bar chart showing use of IRs in OCLC](chart2.png)
Question 4: Do you create or have you created Institutional Records (IRs) for your institution in OCLC?

**Answer:** 21.82% said they do create/have created IRs in OCLC, while 52.73% have not and 25.45% are unfamiliar with IRs in OCLC.

Question 5: Do you use or have you used a Local Bibliographic Data (LBD) resource in WorldCat Local or WorldCat Discovery?

**Answer:** 14.55% of respondents said that they do use/have used LBD in WorldCat, 50.91% said that they do not use LBD and 34.55% said they were unfamiliar with LBD.
Question 6: Do you create or have you created a Local Bibliographic Data (LBD) resource in WorldShare Record Manager?

**Answer:** 6.82% of respondents said they do create/have created LBD in WorldCat, while 63.18% have not and 30% are not familiar with LBD.

![Bar chart showing responses to Question 6](chart6.png)

Question 7: Have you deleted or are you planning to delete your Institutional Records (IR) from WorldCat without migrating to a Local Bibliographic Data (LBD) resource?

**Answer:** 9.09% of respondents said that they do delete/have deleted IRs in WorldCat without migrating to a LBD resource, while 42.73% have not and 48.18% said they do not know.

![Bar chart showing responses to Question 7](chart7.png)
COMMENT BOX QUESTIONS

Question 8: Can you share any use cases when copy specific information in WorldCat was useful for you?

   **Answers:** 220 respondents answered this question with various responses. 60 of the respondents said that copy specific information in WorldCat is not useful for them, while the remaining 160 respondents provided examples of how they use copy specific information in WorldCat. Many respondents noted that they use copy specific information when looking for binding and provenance notes to compare with the item in hand. They also use it to check collations. Others noted that they use copy specific information from Institutional Records in OCLC to verify that they are entering their information correctly. It is easier and more efficient to access this information from the IR directly in OCLC rather than searching a trusted institution’s website or catalog.

Please see the Appendix for the responses.

Question 9: Do you have any suggestions for making copy specific information in bibliographic records more accessible and/or searchable in WorldCat?

   **Answers:** 111 respondents answered this question, of which 82 respondents provided suggestions for making copy specific information in bibliographic records more accessible and/or searchable in WorldCat.

Please see the Appendix for the responses.

Question 10: Do you have any further comments/suggestions?

   **Answers:** 99 respondents answered this question. Many respondents provided further clarification for their answers to the multiple choice questions from this survey. Others provided reasonable suggestions for making copy specific information more accessible and searchable in WorldCat.

Please see the Appendix for the responses.
APPENDIX

Answers to questions 8, 9, and 10
(Scroll to next page)
Q8 Can you share any use cases when copy specific information in WorldCat was useful for you?

<table>
<thead>
<tr>
<th>#</th>
<th>Responses</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>No.</td>
<td>12/7/2015 3:00 PM</td>
</tr>
<tr>
<td>2</td>
<td>I'm often looking for provenance, binding notes, etc to compare with items in hand. I also catalog a lot of ephemeral items, which bear comparison at a detailed level often best served by other copy specific information (to determine completeness).</td>
<td>12/1/2015 4:56 PM</td>
</tr>
<tr>
<td>3</td>
<td>It's hard to narrow this down to specific use cases, but I do look at IRs all the time to determine if an aspect is item specific, like bindings, author's signature, etc., or if it is present in other copies of the expression.</td>
<td>11/30/2015 9:33 AM</td>
</tr>
<tr>
<td>4</td>
<td>I import records containing field 510, or copy that field. I copy notes that sometimes contain copy specific information.</td>
<td>11/19/2015 4:35 AM</td>
</tr>
<tr>
<td>5</td>
<td>Descriptions of bindings by Jan Sobota.</td>
<td>11/18/2015 9:54 AM</td>
</tr>
<tr>
<td>6</td>
<td>NA</td>
<td>11/18/2015 4:56 AM</td>
</tr>
<tr>
<td>7</td>
<td>- When an issue is known to have multiple states, it could be useful to identify which state each institution has. - With donor notes or access points that could facilitate searching provenance (e.g., finding items formerly owned by the Dukes of Norfolk)</td>
<td>11/17/2015 3:47 PM</td>
</tr>
<tr>
<td>8</td>
<td>No, but I can imagine many.</td>
<td>11/17/2015 3:12 PM</td>
</tr>
<tr>
<td>9</td>
<td>In cataloging rare books, I would have found information about bindings useful.</td>
<td>11/17/2015 1:53 PM</td>
</tr>
<tr>
<td>10</td>
<td>not applicable</td>
<td>11/17/2015 12:52 PM</td>
</tr>
<tr>
<td>11</td>
<td>My own copy-specific information is useful. I do not find the copy information of other libraries to be of any use. It certainly doesn’t belong in bibliographic master records.</td>
<td>11/17/2015 9:20 AM</td>
</tr>
<tr>
<td>12</td>
<td>h</td>
<td>11/16/2015 2:44 PM</td>
</tr>
<tr>
<td>13</td>
<td>None available</td>
<td>11/16/2015 2:26 PM</td>
</tr>
<tr>
<td>14</td>
<td>No.</td>
<td>11/16/2015 2:03 PM</td>
</tr>
<tr>
<td>15</td>
<td>Many times I use other institutions' copy specific information to verify that I am entering my information correctly. Having IRs in OCLC, versus having to go out to a trusted institution's site to look at these notes, is a huge time saver.</td>
<td>11/16/2015 12:45 PM</td>
</tr>
<tr>
<td>16</td>
<td>Not at this time.</td>
<td>11/16/2015 12:17 PM</td>
</tr>
<tr>
<td>17</td>
<td>Checking collations.</td>
<td>11/16/2015 10:45 AM</td>
</tr>
<tr>
<td>18</td>
<td>It hasn't been useful before.</td>
<td>11/16/2015 10:36 AM</td>
</tr>
<tr>
<td>19</td>
<td>Local data is really important for Rare Book cataloging as well as users identifying the provenance of resources (From the library of ...). It needs to be discoverable. As libraries continue to move onto the Web (e.g., with BIBFRAME, Linked Data, Semantic searching) it becomes even more important.</td>
<td>11/16/2015 10:32 AM</td>
</tr>
<tr>
<td>20</td>
<td>We had a transfer of materials from another institution. When I was given the materials to catalog, I found OCLC records for all items from one of the offices. I was able to verify that the records were written for the item at hand because of the copy details. This saved me (and OCLC) from the inadvertent creation of duplicate records</td>
<td>11/16/2015 10:27 AM</td>
</tr>
<tr>
<td>21</td>
<td>I can't remember any specifics right now, but there have been many times when information in IR records was crucial to saving me research time.</td>
<td>11/16/2015 10:12 AM</td>
</tr>
<tr>
<td>22</td>
<td>No, I have never found copy specific information to be helpful. Mainly it is annoying because it has to be deleted from the local copy of the record.</td>
<td>11/16/2015 10:06 AM</td>
</tr>
<tr>
<td>23</td>
<td>have not used such information</td>
<td>11/16/2015 9:36 AM</td>
</tr>
<tr>
<td>24</td>
<td>no</td>
<td>11/16/2015 9:27 AM</td>
</tr>
<tr>
<td>25</td>
<td>no</td>
<td>11/16/2015 9:13 AM</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>26</td>
<td>Afraid not.</td>
<td>11/16/2015 7:07 AM</td>
</tr>
<tr>
<td>27</td>
<td>Occasionally we make use of local information that gives an indication of printing dates or variants when this appears in WorldCat.</td>
<td>11/15/2015 10:04 PM</td>
</tr>
<tr>
<td>28</td>
<td>no</td>
<td>11/15/2015 9:37 AM</td>
</tr>
<tr>
<td>29</td>
<td>No</td>
<td>11/15/2015 8:19 AM</td>
</tr>
<tr>
<td>30</td>
<td>The can have important bibliographical citations or improved collations. Also, occasionally measurements show that large-paper copies exist. We’ve used ownership notes to trace provenance of collections that have been dispersed.</td>
<td>11/14/2015 3:47 PM</td>
</tr>
<tr>
<td>31</td>
<td>Not specifically.</td>
<td>11/14/2015 11:54 AM</td>
</tr>
<tr>
<td>32</td>
<td>no</td>
<td>11/14/2015 10:29 AM</td>
</tr>
<tr>
<td>33</td>
<td>no</td>
<td>11/14/2015 10:08 AM</td>
</tr>
<tr>
<td>34</td>
<td>As it seems to be inaccessible I search for it using other services</td>
<td>11/14/2015 8:40 AM</td>
</tr>
<tr>
<td>35</td>
<td>Provenance research</td>
<td>11/14/2015 6:04 AM</td>
</tr>
<tr>
<td>36</td>
<td>when it is thoroughly described</td>
<td>11/14/2015 12:34 AM</td>
</tr>
<tr>
<td>37</td>
<td>No.</td>
<td>11/13/2015 7:04 PM</td>
</tr>
<tr>
<td>38</td>
<td>Binding info</td>
<td>11/13/2015 7:03 PM</td>
</tr>
<tr>
<td>39</td>
<td>No</td>
<td>11/13/2015 12:29 PM</td>
</tr>
<tr>
<td>40</td>
<td>It's useful for researchers and librarians working with rare European collections missed or moved or dissipated</td>
<td>11/13/2015 9:45 AM</td>
</tr>
<tr>
<td>41</td>
<td>not searched for in worldcat, searched at the institution itself (provenance records as an example)</td>
<td>11/13/2015 8:55 AM</td>
</tr>
<tr>
<td>42</td>
<td>My institution is not cataloguing directly in WorldCat nowadays. Only send you our records.</td>
<td>11/13/2015 5:10 AM</td>
</tr>
<tr>
<td>43</td>
<td>Verify binding types, bookplates, annotations for provenance -- it's a way to tell if the book is lacking plates, plate count -- useful to both catalogers and researchers</td>
<td>11/12/2015 9:06 PM</td>
</tr>
<tr>
<td>44</td>
<td>For &quot;issue&quot; specific info, for serials, I look at IRs all the time to see, for instance, if another library has earlier or later issues. Based on that info, I may be able to add beginning and/or ending dates to the serial record and/or confirm the title is still current or has ceased or has changed title. There are many titles in OCLC for which IRs have more information than the master record.</td>
<td>11/12/2015 6:55 PM</td>
</tr>
<tr>
<td>45</td>
<td>Yes</td>
<td>11/12/2015 5:04 PM</td>
</tr>
<tr>
<td>46</td>
<td>Search for books from certain collections or certain previous owners</td>
<td>11/12/2015 2:12 PM</td>
</tr>
<tr>
<td>47</td>
<td>Provenance research (Antwerp monasteries)</td>
<td>11/12/2015 10:50 AM</td>
</tr>
<tr>
<td>48</td>
<td>It could be useful in book census projects, e.g. the current census project for copies of the first edition of Vesalius's &quot;De humani corporis fabrica&quot;, to ascertain the presence and frequency of annotations in copies of a work details of their bindings, etc. It is useful when trying to trace items from a collection which has been dispersed among many libraries.</td>
<td>11/12/2015 10:27 AM</td>
</tr>
<tr>
<td>49</td>
<td>no, but without IRs to those who now have access to them, our local ID numbers are unavailable</td>
<td>11/12/2015 9:06 AM</td>
</tr>
<tr>
<td>50</td>
<td>Comparing copies of incunabula</td>
<td>11/12/2015 7:28 AM</td>
</tr>
<tr>
<td>51</td>
<td>identification rare documents</td>
<td>11/12/2015 4:59 AM</td>
</tr>
<tr>
<td>52</td>
<td>Especially for older books, it is important to be able to access copy specific information. Books can be incomplete, have inserted handwritten texts, or have bound different works together in one cover. The cover itself, often unique to the copy, might have particularities that are important to describe. Without access to this copy specific information, it becomes impossible for clients studying these books to find the copies that are of particular interest to their research.</td>
<td>11/12/2015 4:59 AM</td>
</tr>
<tr>
<td>53</td>
<td>Copy specific information is useful in bookbinding or provenance research</td>
<td>11/12/2015 4:13 AM</td>
</tr>
<tr>
<td>54</td>
<td>provenance research</td>
<td>11/12/2015 4:12 AM</td>
</tr>
<tr>
<td>55</td>
<td>Copy specific information is useful when it is the only place where this is held.</td>
<td>11/11/2015 4:12 PM</td>
</tr>
<tr>
<td>56</td>
<td>I have sometimes used it to find provenance, which is not easy to do in Worldcat but have occasionally found things</td>
<td>11/11/2015 11:24 AM</td>
</tr>
<tr>
<td>57</td>
<td>No.</td>
<td>11/11/2015 8:53 AM</td>
</tr>
</tbody>
</table>
58 As a cataloguer of special collection, I’m using and describing copy specific information almost daily. For example to describe unique covers, former owners, interesting notes etc. Which is appreciated and used by our customers and researchers.

59 No.

60 I assume by WorldCat you mean the database as viewed in the Connexion client, because the public interface of WorldCat on the web does not show IR or copy specific information. There are too many advantages to list. A few: IRs almost without exception carry more detail both at the manifestation and the item level, therefore they are more useful for cataloging purposes and for discovery; helpful in establishing the ideal copy and in determining whether ours is defective; useful in assessing rarity and making decisions about acquisition and/or deaccessioning of rare materials; useful for authority work; crucial for any research on books as objects, e.g., binding, ownership history, decoration, provenance, inscriptions, annotations, watermarks, etc.

61 For our manuscripts master records, we put in minimal information. We put all our local notes in the Institutional Records.

62 Copy specific information is essential to our patrons in comparing one institution’s copy of a given work to other institutions’ copies, e.g. if they’re compiling a bibliography or a census of known copies of a particular work. These patrons won’t know whether or not it’s worth it to them to travel to our library unless they can see our copy-specific information for that work. If we could access IRs more readily, we would also use other institutions’ copy-specific information to help determine whether our copy is a bibliographical variant or represents a different state or issue within the same edition.

63 1. I was having trouble establishing the identity of the owner of an 18th-century manuscript library catalogue who was identified on the title page simply as “Mr. d’Anthilly.” I searched WorldCat for this name and found a book at the Clark Library which had recorded an ownership stencil bearing his full name (Charles-Antoine d’Anthilly). I knew it was the correct owner, because the same stenciling technique was used in our catalogue. I confirmed the match when I found the Clark book in the library catalogue itself. I was recently trying to find books formerly owned by Jean Grolier in American libraries. By searching for Jean Grolier, any record that had him as an added entry came up (former owner). This would have been extremely tedious and less comprehensive if I had to guess which institutions might have Jean Grolier books and then check their individual catalogues. I was undertaking this search on behalf of a researcher and also because I was looking for examples of how others had recorded binding details.

64 For an article three years ago I was searching for a specific state of an old map; I found several hits on this map but couldn’t detect the right state in Worldcat. Instead I had to link to the local catalogue of more specific information (and found it there). So copy specific information in WC would be very useful at the time ...

65 No.

66 I usually use COPAC for this matter, and it is useful to see e.g. ownership of materials.

67 No.

68 Add to local knowledge.

69 I don’t use Worldcat for the cataloguing.

70 Provenance, clear basic printing information.

71 Provenance, annotations, binding (hand) coloring, collation (if lacking in bibliographical record), any copy specific variants (i.e.large paper, numbered/signed copies, trade binding etc.)

72 OCLC 781117987 tag 581 B: At foot of imprint: According to the copy printed at Edinburgh by Andro Hart, in the yeare 1610.

73 No.

74 I’m interested in rare books or maps records stating that (and how) the copy is hand coloured or uncoloured (if both is possible) to find out what is/was common then.

75 The inverse. I published a paper on the early publication history of Tolkien’s Lord of the Rings. It was essential that I consult copies of different printings of the first edition, in order to determine whether they were printed in England, or in the States. At that time, tools such as WorldCat were no use.

76 No.

77 Yes, in looking for known copies of a book inscribed by a historic fellow of the institution where I work.

78 Provenance, research

79 Did not find enough copy-specific information even in Firstsearch.
We specialize in fine press books, which often vary in terms of binding and other copy specific aspects of the item. We often need the copy-specific information to determine if another institution's holding is identical to ours.
We often look to compare number on an IR when a call number for my desire scheme is lacking from the master enha printer’s device, that helps me verify the record as a match for my edition in hand. Also, I appreciate the IR’s on OCLC that
Frequently with rare book cataloging, I find an IR that includes details such as a signature statement, or the presence of rare materials I am
specifically.

I generally have used IRs to look for variations between copies or issues, but not for copy specific information. This morning I was using a digitised image of a copy help in the BL that had parts added; it is listed in stc as an imperfect copy in the particular gatherings and pages, but it is impossible to tell, without copy specific info, whether the pages were tipped in or what; and in another case this week, there is clearly an imposition problem in one digitized copy I was looking at, but no mention of that in the
COpy specific information is crucial in my work. This morning I was using a digitised image of a copy help in the BL that has had parts added; it is listed in stc as an imperfect copy in the particular gatherings and pages, but it is impossible to tell, without copy specific info, whether the pages were tipped in or what; and in another case this week, there is clearly an imposition problem in one digitized copy I was looking at, but no mention of that in the
Cataloging rare items has been most useful, especially in finding certain oddities with the book in hand that otherwise may have been missed.

I can tell you when it was not. I have discovered that microfilm of the Pittsburgh Courier is consistently misidentified by librarians. It took months, but I confirmed that almost none of the local-edition microfilm listed in OCLC holdings is actually film of those local editions.

We are a small institution and being able to see specifically what is available elsewhere is extremely helpful, both with cataloging our own copy and with providing the best assistance to our patrons.

No – my library has always added copy-specific information only in our local catalog.

It is useful when I am trying to compare the ways in which certain bibliographical qualities are described.

When working with researchers who needed or, more importantly in some ways learned that they needed once the existence was known, a specific copy.

I do research on 16th century books. On several occasions I have wasted part of a trip to examine a book that turned out to be damaged, or copy-cataloged onto a description that did not fit that library’s actual holdings, or otherwise inaccurately identified.

COpy specific information is crucial in my work. This morning I was using a digitised image of a copy help in the BL that has had parts added; it is listed in stc as an imperfect copy in the particular gatherings and pages, but it is impossible to tell, without copy specific info, whether the pages were tipped in or what; and in another case this week, there is clearly an imposition problem in one digitized copy I was looking at, but no mention of that in the cataloguing.

Find a copy owned by a certain person

In the case of misbound leaves, to determine if other copies also have those same leaves misbound. In the case of a blank leaf at the end, to determine if other copies also contain that blank leaf.

I generally have used IRs to look for variations between copies or issues, but not for copy-specific information specifically.

I look at other institution records all the time because they tend to be more complete and detailed, especially for the type of rare materials I am cataloging.

No, but I am not a researcher

Frequently with rare book cataloging, I find an IR that includes details such as a signature statement, or the presence of a printer’s device, that helps me verify the record as a match for my edition in hand. Also, I appreciate the IR’s on OCLC that enhance the standard subject headings by adding form/genre entries. Occasionally, I may find a usable classification number on an IR when a call number for my desire scheme is lacking from the master record.

We often look to compare our copy to those at other organizations in an effort to determine whether or not they are the same.
<table>
<thead>
<tr>
<th>ID</th>
<th>Text</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>130</td>
<td>No, sorry.</td>
<td>10/20/2015 6:46 PM</td>
</tr>
<tr>
<td>131</td>
<td>IRs via Connexion have been very useful for special collections cataloging. We do not use WorldCat Local or WorldCat Discovery so we do not have access to LBD in WorldCat.</td>
<td>10/20/2015 4:29 PM</td>
</tr>
<tr>
<td>132</td>
<td>It's helpful to see copy-specific information from other institutions when one is checking to see if an anomaly in our own copy is also found in other copies. We also know of researchers interested in particular previous owners, or in particular binding styles, who want to find this information in WorldCat.</td>
<td>10/20/2015 3:08 PM</td>
</tr>
<tr>
<td>133</td>
<td>No</td>
<td>10/20/2015 2:56 PM</td>
</tr>
<tr>
<td>134</td>
<td>Pretty much constantly.</td>
<td>10/20/2015 12:38 PM</td>
</tr>
<tr>
<td>135</td>
<td>Identifying specific issues</td>
<td>10/20/2015 12:25 PM</td>
</tr>
<tr>
<td>136</td>
<td>I'm afraid not. More often than not, it manifests as a burden, taking the form of copy-specific notes not removed from OCLC master records when imported as part of a batch process.</td>
<td>10/20/2015 12:14 PM</td>
</tr>
<tr>
<td>137</td>
<td>No</td>
<td>10/20/2015 12:12 PM</td>
</tr>
<tr>
<td>138</td>
<td>I have generally not found copy specific information useful in WorldCat; maybe once or twice in my whole career has it been helpful, and when I need to check copy specific information I always go to the local catalog of the institution in question.</td>
<td>10/20/2015 11:25 AM</td>
</tr>
<tr>
<td>139</td>
<td>Printing variants that may or may not be copy specific to compare with my institution's copy. Provenance info.</td>
<td>10/20/2015 10:30 AM</td>
</tr>
<tr>
<td>140</td>
<td>No</td>
<td>10/20/2015 10:20 AM</td>
</tr>
<tr>
<td>141</td>
<td>I find the LBD option potentially useful for cases when we have special markings or bindings for a particular item, although it's currently not part of our regular workflow. We use Connexion Client heavily, which doesn't have the LBD option, so my supervisor will not approve using the Record Manager to manage LBD.</td>
<td>10/20/2015 10:16 AM</td>
</tr>
<tr>
<td>142</td>
<td>Sometimes it's not obvious that there are multiple volumes or parts to an item and one institution will catalog it with a single volume and then someone else will catalog it with all parts. Also, multiple titles can get bound together and that will increase pagination counts.</td>
<td>10/20/2015 9:19 AM</td>
</tr>
<tr>
<td>143</td>
<td>N/A</td>
<td>10/20/2015 9:10 AM</td>
</tr>
<tr>
<td>144</td>
<td>n/a</td>
<td>10/20/2015 9:06 AM</td>
</tr>
<tr>
<td>145</td>
<td>Collection development decisions can be affected by the presence in other institutions of - for example - similar or identical association copies, similar or identical jacket or binding edition variants, incompleteness or irregularities in illustrations, maps etc</td>
<td>10/20/2015 9:00 AM</td>
</tr>
<tr>
<td>146</td>
<td>Copy-specific information is absolutely essential when dealing with archival collections. To try to describe multiple collections (each named properly according to professional conventions) in the same record is misleading and does a disservice to the profession.</td>
<td>10/20/2015 8:54 AM</td>
</tr>
<tr>
<td>147</td>
<td>Yes - I use copy specific information regularly in my daily work</td>
<td>10/20/2015 8:50 AM</td>
</tr>
<tr>
<td>148</td>
<td>No</td>
<td>10/20/2015 8:47 AM</td>
</tr>
<tr>
<td>149</td>
<td>variants in foliation/pagination; variants in signatures</td>
<td>10/20/2015 8:36 AM</td>
</tr>
<tr>
<td>150</td>
<td>As a special collections cataloger, nearly every item I catalog is unique. These are the materials that separate my library from every other library in the world. This uniqueness must be captured and made searchable. Otherwise, we may as well be Google.</td>
<td>10/20/2015 8:25 AM</td>
</tr>
<tr>
<td>151</td>
<td>Unfortunately, no. 90% of the time when searching for other copies of rare books (esp. early printed books), I am only interested in copy-specific information. I find this sort of data nearly impossible to search for on WorldCat and use the specialized early printed book databases instead. When I have tried to use WorldCat (unless I cannot figure out the best way to search) the individual records seem so confused and muddled together that records are retrieved having 'inscription X' but in reality, that piece of data was just copied/confated from some other record and has nothing to do with that actual copy. The vague edition/copy divisions on WorldCat make searching for individual copies (for me) very difficult.</td>
<td>10/20/2015 8:19 AM</td>
</tr>
<tr>
<td>152</td>
<td>Copy specific info is the most valuable info for rare materials cataloging, but it's practically impossible to find and use in OCLC.</td>
<td>10/20/2015 8:15 AM</td>
</tr>
<tr>
<td>153</td>
<td>It helped identify the provenance of an early English book.</td>
<td>10/20/2015 8:00 AM</td>
</tr>
<tr>
<td>154</td>
<td>Ascertaining if &quot;signed&quot; copies were common; determining &quot;original&quot; bindings; Locating bindings by specific binders; Seeking items from particular former owners (provenance); etc.</td>
<td>10/20/2015 7:54 AM</td>
</tr>
<tr>
<td>155</td>
<td>no</td>
<td>10/20/2015 7:50 AM</td>
</tr>
</tbody>
</table>
Finding examples of a particular bookplate in other libraries that I had been unable to identify, but that the other libraries had been able to identify. Tracing copies of books belonging to a particular person or institution that our researchers are interested in. Etc.

Discovering local provenance information or other inscriptions to help date an item or identify attribution. Looking for fuller records when the Institutional Record contains more information or is more complete than the master record. Looking for information justifying or expanding upon supplied elements in the catalog record.

No. I don’t look for copy specific information for books in other institutions. As a cataloger, I’m more interested in matching up bibliographic descriptions. I want to include searchable copy specific information somewhere (bib record? LBD?) for our researchers and for our own record-keeping.

For identifying usages and forms of headings when establishing name authority headings -- master records don’t provide the most information.

Confirmed local copy information.

Yes, for research I was doing on the sale catalogues of a book collector’s collection -- I needed to know which ones had annotated lots.

When attempting to distinguish between complete and incomplete copies of an edition, surveying 19th century variant cloth bindings, etc.

States for rare materials Serials details.

Not at this time.

No, but I view them as needed security/proof of ownership identification.

When attempting to distinguish between complete and incomplete copies of an edition, surveying 19th century variant cloth bindings, etc.

For finding numbered copies, or personal copies with annotations, or specific bindings.

ESSENTIAL component when using RBMS "Transfer Guidelines..." materials from general collections to special collections - please consult Guidelines.

The individual records from John Carter Brown regarding publications from Peru.

Always useful.

There are plenty of times when I need clarification on an aspect of the bib record that can’t be determined from the master record. When errors (or assumed errors) creep in, it’s important to be able to check other copies to make sure my information matches.

On numerous occasions, copy-specific information has alerted me to copies that should receive intensive bibliographical scrutiny or that had significant early annotations or a significant provenance.

No.

To verify bibliographic information.

To check copies with and those without errata sheets.

Although usually not possible except in cases of “improper” inclusion on master bibliographic records, access to former owners of specific copies through a global WorldCat search would frequently be of immediate value to multiple users.

MANY! Helping to distinguish when a variation (plates, TP features, binding, etc) is a copy-specific or issue/edition-general feature. Details of copy often help distinguish between records that could be for the same bib item but aren’t, due to the often-low level of cataloging in many master records.

When cataloging pre-1700 books which can vary significantly in terms of signatures, pagination, etc. It helps to figure out whether you have a documented variant in hand.

Not really copy specific, but local records retained as IRs sometimes bring out bibliographic details that differ from the OCLC record to which they are attached. I have sought these out in the past for pre-1700 books. Sometimes of course a comparison of "master" records is instructive, since various records for rare materials are retained if they don’t get merged or overwritten.
A specific example would be short stories published in Harper's New Monthly Magazine, that have been cataloged with the short story title as the main entry. The only place the name of the magazine (and volume and issue number) appears is in the 500 note, as in, "Contained in: Harper's New Monthly Magazine, v. 490 (Mar. 1891)."

Sometimes it is nice to see how other institutions construct copy specific information in notes.

I once had another library contact mine as we each had one volume of a two volume set. We had a copy-specific note in a 500 with $5 about a fore-edge painting; their volume also had a similar fore-edge painting. I have also used IRs or looked at holding library catalogs when the master record(s) in OCLC were an ambiguous match to the one I had in hand.

In the master record environment necessary to use WorldCat, it is often difficult to determine if the OCLC record in question is the right issue for your item. Additionally, the rules sometimes call for multiple issues/states to be cataloged on the same record. In both these cases, local information is necessary to provide the proper access to materials.

Copy-specific notes can be very useful for dating materials (e.g. an undated publication for which a cataloger has provided a suggested publication date based on a former owner's dated inscription). When the master record on OCLC does not have a detail such as the signature statement, binding information, the fully transcribed imprint, or other rare book cataloging type of information, and that information could help me to identify whether the book I am cataloging warrants an original or whether I can use that master record. (I also use such information to be lazy and copy-catalog, to be perfectly honest.) Before IRs existed I'd go to the other library's catalog and look there, but sometimes those catalogs are behind firewalls.

Specific descriptive data (i.e. binding)

When bib records for different manifestations (publisher(s), publication date, pagination/volumation, etc.) for pre-1900 resources have been combined in the OCLC master record. We are looking to match pre-1900 copies to existing manifestations in OCLC. The institutional records attached to a master are often the only place where we find cataloging copy.

500 Non contemporary full brown calf; signed with ink stamp inside front flyleaf "Bound by W. Pratt"...ǂ5 E8W 655

Signed bindings (Bindine) ǂ2 rbbin ǂ5 E8W

I recall I found a record in another library's catalog that helped me catalog what I had in hand.

An owner's inscription which gave a purchase date provided a useful upper limit to the publication date of an undated incunable. This information was in a 500 note with $5 NUC symbol.

Dates inscribed in specific copies have helped me with assigning dates

no

No, I cannot.

For older materials, invaluable to confirm extent of item, cover info, date, name on signature. Especially to assess what's a feature of the publication as opposed to truly missing.

N/a

In cataloging rare books, whenever questions arise about editions, I consult copy-specific information in the form of IR's to ascertain the nature of any variations.

not at this time

No.

Nope.

No

no

I use IRs quite often for compare while cataloging Chinese rare books. I strongly hope those Chinese rare book project IRs could be kept in OCLC

For Rare Book cataloging
| 209 | Often IRs have more detailed cataloging than Master Records. This can be helpful in distinguishing states, saving a huge amount of time, verifying details, etc. | 10/16/2015 4:29 PM |
| 210 | The cases of when I avail myself of IRs are many. But, the two main cases are when the master record does not contain enough information for me to decide with certainty whether the item in hand is a good match. Often the IRs associated with that master record will contain more conclusion information. Additionally I use IRs to crib from, when I’m updating a master record. It can save a lot of keystrokes. | 10/16/2015 4:06 PM |
| 211 | No | 10/16/2015 3:43 PM |
| 212 | No, but I expect it has been useful to our researchers! | 10/16/2015 3:40 PM |
| 213 | Some older material were released in various versions. The copy specific material allows me to identify whether my version is unique or one of many. | 10/16/2015 3:39 PM |
| 214 | I was trying to confirm a publication date for a specific edition of a book that had many editions over about 20 years. In Connexion, there were dozens of records but WorldCat lumped them into just a handful so it was useless to me. I needed to see the full pagination, binding notes and other fine details to try to match my item in hand. | 10/16/2015 3:36 PM |
| 215 | I can’t recall anything specific. | 10/16/2015 3:35 PM |
| 216 | Mostly for pre-1800: pagination irregularities, collation, missing pages, notes about inscriptions and signatures, etc. | 10/16/2015 3:33 PM |
| 217 | Institutional Records are often fuller than the master record with exact and full transcriptions in 245 and 260/4, collations and physical descriptions in 500, references in 510, rare book genre headings in 655, addition added entries in 7XX, and 752. There are also sometimes explanatory notes distinguishing editions and/or issues. | 10/16/2015 3:18 PM |
| 218 | We have many rare books and need to distinguish among different states of various issues. | 10/16/2015 3:10 PM |
| 219 | Binding and colophon info | 10/16/2015 3:09 PM |
| 220 | test | 10/9/2015 4:46 PM |
Q9 Do you have any suggestions for making copy specific information in bibliographic records more accessible and/or searchable in WorldCat?

<table>
<thead>
<tr>
<th>#:</th>
<th>Responses</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes, it would be great if you could allow libraries to search and see the local data fields (as an aggregate, not library by library) especially for the rare book community where small differences in copies make a big difference. This would also make people less likely to create unique bibliographic records for small variations related to issues and states of an impression and/or edition. It could also be a place to park all those 7XX fields currently designated as local through the use of $5 subfields.</td>
<td>12/7/2015 3:00 PM</td>
</tr>
<tr>
<td>2</td>
<td>If specific fields for local data or fields tagged as local can display separately from other general notes - identifying the source library of the note, I think that would be incredibly helpful to users and other catalogers/librarians. I think doing this on the back and front end of OCLC would be ideal.</td>
<td>11/30/2015 9:33 AM</td>
</tr>
<tr>
<td>3</td>
<td>No</td>
<td>11/19/2015 4:35 AM</td>
</tr>
<tr>
<td>4</td>
<td>Not really; can't you knw: them?</td>
<td>11/18/2015 9:54 AM</td>
</tr>
<tr>
<td>5</td>
<td>NA</td>
<td>11/18/2015 4:56 AM</td>
</tr>
<tr>
<td>6</td>
<td>OCLC has to be interested. This area is critical for rare books cataloging.</td>
<td>11/17/2015 3:12 PM</td>
</tr>
<tr>
<td>7</td>
<td>It would be very useful to see the copy specific information without going to a library’s own catalog, if, for example, by clicking on an institution’s name, we could see the local fields.</td>
<td>11/17/2015 1:53 PM</td>
</tr>
<tr>
<td>8</td>
<td>Just keep it out of master bib records.</td>
<td>11/17/2015 9:20 AM</td>
</tr>
<tr>
<td>9</td>
<td>No.</td>
<td>11/16/2015 2:03 PM</td>
</tr>
<tr>
<td>10</td>
<td>Perhaps a special field or new indicator that would be visible to public view?</td>
<td>11/16/2015 12:17 PM</td>
</tr>
<tr>
<td>11</td>
<td>Remove all restrictions for adding local data (i.e., $5).</td>
<td>11/16/2015 10:32 AM</td>
</tr>
<tr>
<td>12</td>
<td>making the display and searchability of copy specific features (e.g. 5xx notes with $5s) a feature that you can &quot;turn off/on&quot; similar to GLIMP clustering.</td>
<td>11/16/2015 10:27 AM</td>
</tr>
<tr>
<td>13</td>
<td>Perhaps consider the possibility of using available fields in the holdings records, such as 561 (provenance) and 563 (binding).</td>
<td>11/15/2015 10:04 PM</td>
</tr>
<tr>
<td>14</td>
<td>No, but I think they should be more accessible/searchable</td>
<td>11/15/2015 9:37 AM</td>
</tr>
<tr>
<td>15</td>
<td>no yet - see answer to 10.</td>
<td>11/14/2015 10:29 AM</td>
</tr>
<tr>
<td>16</td>
<td>Provide specific search options for it</td>
<td>11/14/2015 8:40 AM</td>
</tr>
<tr>
<td>17</td>
<td>accurate linking from publishing year to institution</td>
<td>11/14/2015 12:34 AM</td>
</tr>
<tr>
<td>18</td>
<td>No</td>
<td>11/13/2015 12:29 PM</td>
</tr>
<tr>
<td>19</td>
<td>In our system we are able to search in local information in bibliographic records associated a items information, like donation and donors, former owners, ancient printers...</td>
<td>11/13/2015 5:10 AM</td>
</tr>
<tr>
<td>20</td>
<td>It would be convenient if in a world cat record maybe at the bottom, after the main bib-record, it could display IR specific data, with the Institution’s name attached and named “Individual Holdings Notes” or something to that effect. As it is, it is sometimes difficult for users to keep clicking through the Institution’s websites to find the data they’re looking for.</td>
<td>11/12/2015 9:06 PM</td>
</tr>
<tr>
<td>21</td>
<td>To make the data in IRs remain available to catalogers, urge OCLC to find a way to freeze IRs for perpetual access. Another way to keep the data might be to migrate non-duplicative fields to the master record with indication of associated library ($5 [marc inst. symbol], e.g.). Gather such fields at end of the record so they don't disrupt the flow of the master record itself. Or, gather all such fields into a searchable appendix to the master record. In short, find a way to keep the IR data easily at hand for catalogers.</td>
<td>11/12/2015 6:55 PM</td>
</tr>
</tbody>
</table>
22  Introduce search options for binding terms and/or provenance. We have done this on our OPAC at King's College London: http://library.kcl.ac.uk
11/12/2015 10:27 AM

23  Needs to be clearer which institution copy specific info relates to - and would it be possible simply to search for books only that had copy specific info
11/12/2015 7:28 AM

24  No
11/12/2015 4:59 AM

25  I have no suggestions on how to do it, but that it has to be done is self-evident
11/12/2015 4:13 AM

26  not yet
11/12/2015 4:12 AM

27  The catalogue should offer three layers: 1. General bibliographic 2. Institution specific 3. Copy specific. All information should be indexed, but what is shown depends upon the user (general or specialist)
11/11/2015 4:12 PM

28  When libraries contribute records to WorldCat, I believe sometimes copy-specific information is stripped out. If that is the case, who? I would like to see provenance information (561) and binding descriptions (563) included in records.
11/11/2015 11:24 AM

29  We do not catalog in WorldCat yet, but a transition is planned for 2016.
11/11/2015 8:53 AM

30  -
11/11/2015 7:32 AM

31  My institution (University Library Utrecht) does not catalogue directly in Worldshare Record Manager, but will do so from March 2016. So it is not yet possible to give proper answers to all questions. We will use Local Holding Records for our copy specific information. Provenance (former owner etc.) is considered very important and needs to be accessible and searchable. We are still trying to find out how this can be best realized.
11/11/2015 5:39 AM

32  Currently information that does not appear in the master record (whether general or copy specific) is not available through the public web interface. Ideally the information now stored in IRs would continue to be available in the cataloging client and also available in the WorldCat web interface. Access points, even the copy-specific ones, would be fully indexed and searchable in the same way as non-copy-specific data on master records. Ideally a search could either include or exclude copy specific information in the search results, in the same way as in the Connexion client you can include or exclude IRs in the search results.
11/10/2015 4:05 PM

33  No (assuming that if it were just a matter of adding the 852 field to the searchable fields, it would have been done already)
11/10/2015 1:59 PM

34  - Add provenance fields - Add fields for annotated copies
11/10/2015 10:19 AM

35  In the COPAC environment libraries usually use numeric subfields to identify the library/collection for which the content of the marc field applies to.
11/10/2015 8:07 AM

36  I don't have any idea
11/10/2015 7:23 AM

37  Don't suppress this information, or make it only available in advanced views.
11/10/2015 7:07 AM

38  Always keep the information linked to the item/copy described.
11/10/2015 5:47 AM

39  Specific search fields for copy information.
11/10/2015 5:46 AM

40  No
11/10/2015 5:21 AM

41  Add an annotations file to the holding for copy details.
11/10/2015 4:38 AM

42  I find them baffling hard to find at the moment, so anything that makes it clear how to search them and where to find them in the records would be useful.
11/10/2015 4:06 AM

43  Display and make searchable copy-specific notes. (With the shelfmark when multiple copies in a record). Index copy-specific names.
11/10/2015 3:55 AM

44  It should be easy to see each institutions LBD/copy specific info; everything should be searchable.
11/6/2015 12:26 PM

45  I don't have suggestions for HOW to do it, but I can tell you that I want to be able to limit by local collection; sort easily by date (showing all copies and not having to click "view all editions" to reveal dates; to preserve my results list even when clicking backwards and forwards.
11/2/2015 5:42 PM

46  All legal MARC fields should be indexed and searchable. If the fields are not searchable, what is the point of populating them?
11/2/2015 4:05 PM

47  My only suggestion is to somehow make copy-specific notes appear with the "brief view" results in WorldCat. By this I mean the listings of "Libraries Near Your That Have This Item" could include copy-specific notes. This could be a feature of FirstSearch (or its replacement) and not necessarily of the public WorldCat, as I imagine the coding work to accomplish this, and the fact that some very long copy-specific notes exist, would make it impracticable.
10/30/2015 9:47 AM
Unfortunately descriptions, clearly marked as to what institution each applies
metadata that
Manager in part because of the poor handling of copy
I'm not sure how to achieve it, but it is not good the way it is now. Our library is avoiding moving to WorldShare Record
make this information accessible through regular WorldCat but this does not seem to be the
LBD is not practical for institutions that do not use WorldCat Local or WorldCat Discovery. It would be great if OCLC would
associated with a given bibliographic record. But I assume that OCLC has already considered this idea and dismissed it due to
Perhaps some libraries would be willing to pay an extra fee for the service of accessing the trove of local copy
DO WHATEVER THE
"pretty." Those who need it will take the time to learn to find it.

Abandon the concept of the master record and allow institutions to attach their own records! RLIN worked pretty well for complicated cataloging. Since that will not happen, institutions should be allowed to attach fields with a $5 and their symbol, and these fields should become part of the permanent record. Yes this will make for some long records, but it will make records usable. Perhaps one could make the display of such information optional.

I wish I did, but I'm only a measly literature professor and have no clue how any of this is achieved. I'm delighted you're no, but I think this would be useful, especially for security of materials

Not yet, because the problem is one I'm only beginning to be able to address, within a larger federal government organization that has many stakeholders.

Abandon the concept of the master record and allow institutions to attach their own records! RLIN worked pretty well for complicated cataloging. Since that will not happen, institutions should be allowed to attach fields with a $5 and their symbol, and these fields should become part of the permanent record. Yes this will make for some long records, but it will make records usable. Perhaps one could make the display of such information optional.

I think there are probably tactics from both a display perspective and a searching tactics. For display, some way of using the $5 to pull together a particular institutions' copy info in visually distinct part of the screen (and not have it display in the main record area), e.g. Library of Congress copy information: [whatever fields]; American Antiquarian Association copy information: [fields]). Separately indexed would be nice, too, so that you could search only for 7xx w/ $e former owner.

I know that IRs are an option, but it seems like these are not widely used by many institutions, and I am not sure how to search them in the public view of WorldCat, so they seem somewhat useless I would have two suggestions -- make it possible to have both public and non-public IRs or fields in IRs, such that institutions could have control over what is visible and not; promote the use of IRs more widely -- unless a critical mass of institutions uses IRs, I don't see many more institutions adopting them.

If either the LBDs or LHRs were more robust (LBD for example does not support 561s or other dedicated MARC fields for copy-specific information) AND were discoverable in WorldCat (perhaps in a toggle off/on situation.

Not yet, because the problem is one I'm only beginning to be able to address, within a larger federal government organization that has many stakeholders.

Please do!

Abandon the concept of the master record and allow institutions to attach their own records! RLIN worked pretty well for complicated cataloging. Since that will not happen, institutions should be allowed to attach fields with a $5 and their symbol, and these fields should become part of the permanent record. Yes this will make for some long records, but it will make records usable. Perhaps one could make the display of such information optional.

I wish I did, but I'm only a measly literature professor and have no clue how any of this is achieved. I'm delighted you're no, but I think this would be useful, especially for security of materials

Having previous owners available in say a 700 field would be incredibly valuable when trying locate books from a personal library.

As a former cataloguer and now a social historian I do a lot of research in obscure 20th century printed material. I also look for annotated copies of individual works. Much of that material--even of common titles--is in special collections. Having access to precise copy-specific data is critical for me as I allocate my very scarce research-support budget. It also saves me time in posting queries to libraries looking for the kind of data I used to put in our local catalogues.

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Keep the best features of the 1stSearch interface and data. Allow scholars and librarians access to it even if it's not "pretty." Those who need it will take the time to learn to find it.

DO WHATEVER THE FOLGER LIBRARY DOES. They have awesome cataloguing standards and great copy-specific info. Be sure to include not only issues in printed books but also things like marks of ownership/provenance, marginalia, etc.

Yes! Keep the IRs in WorldCat.

Perhaps some libraries would be willing to pay an extra fee for the service of accessing the trove of local copy-specific notes associated with a given bibliographic record. But I assume that OCLC has already considered this idea and dismissed it due to a lack of cost-effectiveness.

LBD is not practical for institutions that do not use WorldCat Local or WorldCat Discovery. It would be great if OCLC would make this information accessible through regular WorldCat but this does not seem to be the plan.

I'm not sure how to achieve it, but it is not good the way it is now. Our library is avoiding moving to WorldShare Record Manager in part because of the poor handling of copy-specific information. Ideally, there should be a master record with metadata that applies to all copies, and then a separate tab or screen to go to in order to see all the various copy-specific descriptions, clearly marked as to what institution each applies to.

Unfortunately no
I don't know that it is absolutely necessary, assuming that institutions are able to maintain a local catalog that does retain the copy specific information. Too much copy specific information in WorldCat could be cluttering and confusing. I can't think of a good way to display without that being the case.

No.

Either add LBD functionality to Connexion Client so we can use it as part of our regular workflow, or upgrade Record Manager enough that it has all of the functionality of Connexion so that we can move our workflows there.

I think that it is important to ensure that the various interfaces accurately reflect the presence of, and basic details about, multiple unique copies.

Sorting them by institution would be helpful, so that the user doesn’t have to read every single note.

Make it visible? Make it searchable? Don’t get rid of IRs? They weren’t ideal for finding copy specific info, but they are a whole lot better than what OCLC now proposes.

no idea.

It seems that being a WMS customer increases the likelihood of copy specific information being more accessible. As someone who works in a WMS library, I have no interest in Worldcat services to non-WMS customers of OCLC. Worldcat already seems overburdened with the current services offered.

Allow anyone to see any institution's Local Bibliographic Data, and allow that data to be searchable in an easy way through the normal Connexion/WorldCat searching protocols.

Allow better, more granular searching in WorldCat. The OPAC's advanced search only has the following fields: Accession Number; Author; ISBN; ISSN; Journal Source; Keyword; Subject; Title. Many of those aren’t applicable to rare materials, and one is left searching "Keyword" for any copy-specific information, which is unfortunately broad.

I’m not sure what the options are. Isn’t copy specific information in bib record still discouraged?

Display the Added / Altered fields inline for all records - perhaps color coding variant.

no.

When displaying the institution’s name that has a copy, also display their call number and availability (whether checked out) in smaller print just below the bolded institution name.

It’s very difficult to locate copy specific information in WorldCat for me without going to the actual institutional catalog. Frequently there are too many records with the wrong information about editions, and the copy-specific information gets orphaned and put into the notes field without a way of knowing which copy it should be attached to.

Include them as separate records. There is so much duplication now in WC that a few more records won’t hurt.

Not sure this would be possible in a master record situation, unless there were options to limit searches to certain fields, institutions, or other parameters.

No.

If only those LBD belonging to other cataloguing agencies were searchable.

Although being able to search LBD information without being in a specific library's "catalog" would be great, it would at least improve accessibility of LBD would be displayable in the same way information from a library's LHRs as displayable in WorldCat—whether immediately when viewing a specific institution's holdings through WorldCat or by clickable link from the holdings information to "Display Local Bibliographic Data". What is overly cumbersome is to have to guess which holdings institutions one needs to search via a local catalog in order to discover the existence of a local catalog. Currently, such a solution would presumably only improve visibility for holdings of WMS institutions who have access to LBD capability, not to users of other systems whose holdings data is not stored by OCLC.

Restore IRs! (The features in LBRs are really useless to catalogers and researchers) Create an open-access union catalog version of US rare book catalogs, using linked data. (Why should OCLC control cataloging records created by US as their proprietary data?)

I'm assuming they're searchable by keyword? If not, they should be.

If IRs are not going to be retained by OCLC, then the next best thing would be to improve electronic links between holdings information and the actual records of the libraries that hold the material.

At my institution there is a (rather backwards) way to limit keyword search to any MARC field, for the above example, I can search just the 500 or 590 fields for "contained in". This may already be possible on Worldcat, I haven’t tried - but this method is usually enough for my needs as a cataloger, though time consuming (as I can’t combine this kind of search with say, date of publication). Impractical for lay users but might be useful somehow....
<p>| | | |</p>
<table>
<thead>
<tr>
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<tbody>
<tr>
<td>93</td>
<td>copy specific information should be visible for all users of WorldCat, not just the user of the local institution and it should be easily accessible.</td>
<td>10/19/2015 4:36 PM</td>
</tr>
<tr>
<td>94</td>
<td>I would like to encourage everyone to update the master record when the additional information is not really local -- I have found info in IRs and local catalogs that it would have been great to have added to the master. If the LBD is OCLC's way forward, it might be nice to be able to view that information, in a similar but easier way than current IR functionality.</td>
<td>10/19/2015 3:40 PM</td>
</tr>
<tr>
<td>95</td>
<td>Not really. I don't use the public user interface of WorldCat to search much; I use the Connexion client.</td>
<td>10/19/2015 3:35 PM</td>
</tr>
<tr>
<td>96</td>
<td>Stop combining bibliographic records when the publisher's name(s), dates of publication, pagination, etc. do not match for pre-1900 imprints. Not only for those that were cataloged under DCRM(B) or other rare materials cataloging rules -- or guidelines.</td>
<td>10/19/2015 3:34 PM</td>
</tr>
<tr>
<td>97</td>
<td>7xx/5</td>
<td>10/19/2015 3:32 PM</td>
</tr>
<tr>
<td>98</td>
<td>I miss RLIN very much. But from what I've heard, the foundation and architecture of Worldcat makes copy-specific information inappropriate.</td>
<td>10/19/2015 3:32 PM</td>
</tr>
<tr>
<td>99</td>
<td>Keep the Institutional Records and encourage their use for rare materials</td>
<td>10/19/2015 2:35 PM</td>
</tr>
<tr>
<td>100</td>
<td>N/a.</td>
<td>10/19/2015 10:47 AM</td>
</tr>
<tr>
<td>101</td>
<td>Being able to click through from a holding library's symbol on WorldCat to the corresponding record in their local system would be nice, but I understand that this depends on the way the link is structured in the holding library's system.</td>
<td>10/19/2015 10:18 AM</td>
</tr>
<tr>
<td>102</td>
<td>not at this time</td>
<td>10/19/2015 9:09 AM</td>
</tr>
<tr>
<td>103</td>
<td>No.</td>
<td>10/19/2015 8:45 AM</td>
</tr>
<tr>
<td>104</td>
<td>I know that Sarah Eleman from Columbia sent a proposal to OCLC Regarding Chinese rare book IRs. I wish OCLC could take some action on it.</td>
<td>10/16/2015 5:30 PM</td>
</tr>
<tr>
<td>105</td>
<td>A more structured form of institutional record sounds like the best approach.</td>
<td>10/16/2015 5:20 PM</td>
</tr>
<tr>
<td>106</td>
<td>No suggestions, but rather an appeal to make them more accessible. Both the rare materials cataloger and the scholarly community would benefit.</td>
<td>10/16/2015 4:06 PM</td>
</tr>
<tr>
<td>107</td>
<td>What if we could click on an institution code and see the version of that institution's record as it was most recently exported from OCLC?</td>
<td>10/16/2015 3:43 PM</td>
</tr>
<tr>
<td>108</td>
<td>Let institutions have individual records in a cluster like we used to have with RLIN.</td>
<td>10/16/2015 3:35 PM</td>
</tr>
<tr>
<td>109</td>
<td>Going to each library's catalog to see copy-specific notes works, however is cumbersome and time consuming. It would be great if OCLC could gather all that information together in a nice little package.</td>
<td>10/16/2015 3:33 PM</td>
</tr>
<tr>
<td>110</td>
<td>I don't, but I think it's genuinely needed!</td>
<td>10/16/2015 3:09 PM</td>
</tr>
<tr>
<td>111</td>
<td>test</td>
<td>10/9/2015 4:46 PM</td>
</tr>
</tbody>
</table>
Q10 Do you have any further comments/suggestions?

Answered: 99     Skipped: 121

<table>
<thead>
<tr>
<th>#</th>
<th>Responses</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>When RLIN and OCLC merged, we chose to migrate our records as IRs. When we decided to give up our IRs we carry local information either in $5 designated fields in master records, or solely in our copy of the downloaded record in our own local integrated library system (usually the latter). This begs the question, what will we do when we have to join a cloud-based system?</td>
<td>12/7/2015 3:00 PM</td>
</tr>
<tr>
<td>2</td>
<td>Users who are looking at copy specific data are likely looking for this information on all known copies. Displaying the notes for the local library in the WorldCat local search is not fully meeting user needs.</td>
<td>11/30/2015 9:33 AM</td>
</tr>
<tr>
<td>3</td>
<td>No</td>
<td>11/19/2015 4:35 AM</td>
</tr>
<tr>
<td>4</td>
<td>NA</td>
<td>11/18/2015 4:56 AM</td>
</tr>
<tr>
<td>5</td>
<td>Please lobby OCLC to make these easily accessible.</td>
<td>11/17/2015 3:12 PM</td>
</tr>
<tr>
<td>6</td>
<td>No</td>
<td>11/16/2015 2:03 PM</td>
</tr>
<tr>
<td>7</td>
<td>I hope to become more able in cataloging rare / unique materials on OCLC and to make local records showing info on bindings, inscriptions, etc.</td>
<td>11/16/2015 10:45 AM</td>
</tr>
<tr>
<td>8</td>
<td>Good luck.</td>
<td>11/16/2015 10:32 AM</td>
</tr>
<tr>
<td>9</td>
<td>This is tangential to the current discussion but still highly relevant to rare/special collections because they are so often gifts. Can we work toward adding $u to the 541 field for donor and gift websites? A few months ago I saw a flurry of discussion on the listservs about how Harvard and other institutions are using 856 fields to link to donor and gift information pages. While this is a valuable copy-level addition to a record, I find it a mis-use of the 856 which is supposed to link to information or digital surrogates of the item at hand, not necessarily the provenance for one of its copies.</td>
<td>11/16/2015 10:27 AM</td>
</tr>
<tr>
<td>10</td>
<td>I am the cataloger at an art museum library and I rely very heavily on the information in IR records that are currently in OCLC. It would be such a waste for that information to disappear.</td>
<td>11/16/2015 10:12 AM</td>
</tr>
<tr>
<td>11</td>
<td>I think copy specific info should only be allowed on IRs, with maybe a couple of exceptions for rare materials. Copy specific info really belongs in item records, not bib records. I do think it is okay to add notes, that while they may not apply to all instances, they do apply to multiple copies (e.g. &quot;Some copies bound with last 10 pages inverted&quot; or something similar.)</td>
<td>11/16/2015 10:06 AM</td>
</tr>
<tr>
<td>12</td>
<td>I would hope U.S. catalogers can encourage our colleagues elsewhere to add copy specific information.</td>
<td>11/16/2015 9:36 AM</td>
</tr>
<tr>
<td>13</td>
<td>Question 7 is not applicable since we do not use IR’s (having never been a former RLIN member)</td>
<td>11/16/2015 9:13 AM</td>
</tr>
<tr>
<td>14</td>
<td>We don’t actually catalogue on WorldCat. However, we’d just like to emphasize that it can be useful to us and other institutions to be able to access local information through OCLC.</td>
<td>11/15/2015 10:04 PM</td>
</tr>
<tr>
<td>15</td>
<td>Minimize the number of records for one edition by hiring a trained cataloguer who can combine clearly duplicate records for the same edition.</td>
<td>11/14/2015 3:47 PM</td>
</tr>
<tr>
<td>16</td>
<td>we are not at present cataloguing directly in Worldcat, but will be doing so within 6 months via WMS (+Record manager).</td>
<td>11/14/2015 10:29 AM</td>
</tr>
<tr>
<td>17</td>
<td>Copy specific information is becoming increasingly important to librarians and users, with the growth in the study of books as material culture. Service providers ignore this at their peril.</td>
<td>11/14/2015 8:40 AM</td>
</tr>
<tr>
<td>18</td>
<td>copy specific information is invaluable for rare books</td>
<td>11/14/2015 12:34 AM</td>
</tr>
<tr>
<td>19</td>
<td>No</td>
<td>11/13/2015 12:29 PM</td>
</tr>
<tr>
<td>20</td>
<td>answered for the situation now. 3,4,5,6 we can answer with: not yet, but within 6 months: yes</td>
<td>11/13/2015 8:55 AM</td>
</tr>
<tr>
<td>21</td>
<td>Please see above. Thanks!</td>
<td>11/12/2015 9:06 PM</td>
</tr>
<tr>
<td>No.</td>
<td>Text</td>
<td>Date</td>
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</tr>
<tr>
<td>22</td>
<td>Local holdings records may be a good way to share some copy specific info via Worldcat. If OCLC could make LHRs searchable, as is the case now for MARC holdings in some library systems, researchers would be well served. Further, since LHRs are based on the MARC holdings format, most libraries already have some data in them (call numbers, copy numbers, serial holdings statements). Existing data could be enriched with, for instance, binding and provenance data for specific copies (entered in MARC holdings format 563 and 561 fields just as in MARC bib format) in library's own system and then batchloaded to OCLC.</td>
<td>11/12/2015 6:55 PM</td>
</tr>
<tr>
<td>23</td>
<td>Copy-specific information is of increasing importance to rare books and special collections researchers and librarians, so any measures to increase its visibility are welcome.</td>
<td>11/12/2015 10:27 AM</td>
</tr>
<tr>
<td>24</td>
<td>I'm told by OCLC that LBD won't work with Connexion, so it looks as if we'll have to let our IRs be deleted, revise/create master records and export them to our inhouse catalog (copies of all our IRs) and complete them there.</td>
<td>11/12/2015 9:06 AM</td>
</tr>
<tr>
<td>25</td>
<td>No</td>
<td>11/12/2015 4:59 AM</td>
</tr>
<tr>
<td>26</td>
<td>Copy-specific information MUST be kept at copy level</td>
<td>11/12/2015 4:13 AM</td>
</tr>
<tr>
<td>27</td>
<td>not yet</td>
<td>11/12/2015 4:12 AM</td>
</tr>
<tr>
<td>28</td>
<td>WorldCat should be less blurred and fibred - now copies are brought together that are not identical editions at all. I think that WorldCat should offer two systems: one for the general public that isn't interested in the book as a physical object but just in its contents and a second, more specialist system for researchers. The backside should be constructed in such a manner that all information like provenances, book bindings etc can be described. The front of the system shows information depending on the user (general or specialist).</td>
<td>11/11/2015 4:12 PM</td>
</tr>
<tr>
<td>29</td>
<td>It is absolutely essential for scholarly and legal reasons, that fields for provenance and copies with handwritten annotations (libri annotati) are created in LHR (local 700 and 710 fields). In the case of bequests the donor usually demands that the provenance be mentioned in the catalog record, as part of the contract. The library has to provide for this.</td>
<td>11/11/2015 8:53 AM</td>
</tr>
<tr>
<td>30</td>
<td>-</td>
<td>11/11/2015 7:32 AM</td>
</tr>
<tr>
<td>31</td>
<td>It is regrettable that the 700-on 710-fields are not included in the Local Holding Record. We would like to use those fields for copy specific information as former owner, annotator &amp;c. Those fields should be in the Local Holding Record for persons, families or corporate bodies associated with an item, as the RDA Toolkit says. We could use a LBD, but that would imply that item specific information will be spread over LBD and LHR.</td>
<td>11/11/2015 5:39 AM</td>
</tr>
<tr>
<td>32</td>
<td>It would be useful to automatically receive reports when record merges break the link between a master record and the embedded link in the local catalog. It would also be useful to mark records that describe items that are unique (do not exist in multiple copies such as manuscripts, archives, art objects, etc.) as such, so automatic merges could not take place.</td>
<td>11/10/2015 4:05 PM</td>
</tr>
<tr>
<td>33</td>
<td>Keep the Institutional Records.</td>
<td>11/10/2015 2:42 PM</td>
</tr>
<tr>
<td>34</td>
<td>Especially when it comes to pre-1800 imprints, the &quot;master record&quot; idea just assumes publications to be more uniform than they actually are. Anything you can do to make that model more sophisticated will be helpful.</td>
<td>11/10/2015 1:59 PM</td>
</tr>
<tr>
<td>35</td>
<td>A major loss with the deletion of IR records is the searchability in WorldCat for provenance information. One does not always know what specific library might hold an item of interest that was owned by someone else, specially bound, etc. As provenance history has been gaining more interest among scholars in the last few decades, this is a huge blow to their work.</td>
<td>11/10/2015 11:36 AM</td>
</tr>
<tr>
<td>36</td>
<td>Please do not show copy specific information at a general level</td>
<td>11/10/2015 10:19 AM</td>
</tr>
<tr>
<td>37</td>
<td>No</td>
<td>11/10/2015 7:23 AM</td>
</tr>
<tr>
<td>38</td>
<td>Search engine, though, is so primitive, which it could be enhanced and more usefully faceted.</td>
<td>11/10/2015 7:07 AM</td>
</tr>
<tr>
<td>39</td>
<td>Please keep copy specific information in bibliographic records accessible and searchable for anyone using Special Collections in any library.</td>
<td>11/10/2015 5:21 AM</td>
</tr>
<tr>
<td>40</td>
<td>It is essential that copy-specific information not be stripped from OCLC records. The capacity for WorldCat to facilitate bibliographical research, or searches for copies of manifestations having certain features, is immense, but only if the data can be found.</td>
<td>11/10/2015 4:17 AM</td>
</tr>
<tr>
<td>41</td>
<td>We are very happy about having LBD records as an option for us.</td>
<td>11/9/2015 2:49 PM</td>
</tr>
<tr>
<td>42</td>
<td>Copy specific information needs to be retained when communicating with external systems (e.g. Hathi Trust)</td>
<td>11/4/2015 10:29 AM</td>
</tr>
<tr>
<td>43</td>
<td>Thanks for doing this survey.</td>
<td>11/2/2015 5:42 PM</td>
</tr>
<tr>
<td>44</td>
<td>If the institution records disappear from public view, they should at very least still remain “behind the scenes” so that copy-catalogers can still use them as a template.</td>
<td>10/30/2015 9:47 AM</td>
</tr>
</tbody>
</table>
For me, the issue with the phasing out of institutional records is less about the copy-specific information than about the quality of the institutional records as opposed to the OCLC master records. IRs are often more detailed, have more subject headings, added entries, and genre/form headings than master records, and are more useful for copy-cataloging the types of materials found in a special collections environment such as mine.

Our resources are buried because they are unique, and students don't click on the "find all editions" button to know that we have rare early editions that they are encouraged to use.

My institution creates IRs in batch from our local catalog, so no individual creates them manually but they exist for all of our records.

The more opportunity you offer Rare Book and Special Collections librarians and catalogers to specify the unique descriptions and characteristics of their holdings the better. With security a growing issue, this resource can assist all of us keep our collections safe, and be valuable assistants to our colleagues should we find something that may not belong in the place it's ended up. It also helps us maintain a much more robust description to assist the most important reason we create these collections...our patrons...

Copy specific information is essential in describing your resource.

If there were some intuitive way to access data from IRs in the public view of WorldCat, especially non-confidential information on signatures, inscriptions, and provenance, I think this would greatly promote the adoption and use of IRs.

Right now it's very confusing to be able to compare where one creates either LHRs or LBDs (I believe only through WorldShare Metadata services and WHICH platforms they are discoverable. Some of us are still on Connexion and the implications for workflow also need to inform our decisions re: discoverability for our local data, but getting a clear answer from OCLC seems to be difficult. I can only get a portion of the "picture".

We do not have IR's, so question 7 is irrelevant.

No.

it would be best if the information was kept as clean as possible; for example, I was looking for a particular item in my library that supposedly had a fore-edge painting, but that information was from the OCLC record and not adjusted for the item in my library...

OCLC is going to make the work of researchers, not just catalogers, a lot harder by eliminating local records. At a certain point, WorldShare will become useless for serious researchers and a competitor will develop, funded by major research libraries with deep pockets and access to granting organizations. WorldShare is already problematic for individuals looking for early or rare materials. I could not find something with a known item search at a research library and was told by public service staff that the problem was not unique to myself.

no

Nope, just the thing above; and thanks!

When doing humanities research, data is good. Author/title data is not enough. Me and researchers like me need to know data that is strictly copy-specific: provenance, condition, annotations, variation, etc.

NO

Thank you!

Thank you—this is extremely important to anyone doing historical research.

Regarding question 7, we did not have IRs in Connexion so there is nothing to delete.

Once we understood that OCLC had reached a firm decision to phase out access to the data contained in Institutional Records, and to limit LBD access as well, our library chose not to convert our IR's to LBD at all. It is disconcerting to think of the rich bibliographic detail that will consequently be lacking from the display of our holdings on WorldCat forever; however, we trust that the quality of the data in local OPAC(s) will sustain the needs of us metadata professionals and any other researchers who take the extra time to search for it in local catalogs. In my opinion, this single step forward for OCLC amounts to a regrettable setback for the shared cataloging community. Thank you, and good luck advancing the results of this survey.

We are interested in testing the parallel path of exposing this data in other ways, beyond OCLC or with OCLC (but not necessarily in LBD in WorldCat). We would also like to know if anyone is looking at ways to share copy-specific data *independently* of WorldCat, e.g., by exposing RDF catalog data to commercial search engines or providing SPARQL endpoints.

Save the IR!!

Thank you for your work!!
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<tbody>
<tr>
<td>67</td>
<td>More information about bindings; too few libraries record binding information, making research difficult, particularly for 'ordinary' trade bindings.</td>
</tr>
<tr>
<td>68</td>
<td>Our institution is now using Alma which requires a Master Bibliographic Record in the Network Zone for all campuses in our system. Copy specific (CSI) information in the OCLC Bib. Record is a problem both for CSI for our copy and CSI for other institutions. (i.e. adding ours or deleting others) It appears to be a problem with no solution.</td>
</tr>
<tr>
<td>69</td>
<td>No</td>
</tr>
<tr>
<td>70</td>
<td>This has bugged me since day one, as I cannot create accurate (or even remotely accurate) records for the collections that I deal with on a daily basis. The existing system may actually suppress access to archival collections and interesting copies of rare books.</td>
</tr>
<tr>
<td>71</td>
<td>OCLC is now pretty useless for rare materials cataloging. I don't see much point in having my catalogers work in OCLC--our local system works better and we can always export those records, even though no one will ever see them.</td>
</tr>
<tr>
<td>72</td>
<td>I haven't seen any discussion of the problems that arise in a shared catalog like OhioLINK, where my institution's records can be replaced by any other member institution, any time.</td>
</tr>
<tr>
<td>73</td>
<td>n/a</td>
</tr>
<tr>
<td>74</td>
<td>no</td>
</tr>
<tr>
<td>75</td>
<td>Thank you very much for offering this survey.</td>
</tr>
<tr>
<td>76</td>
<td>I understand that Connexion will eventually be phased out; MARC is going away, and changes in cataloging standards are right around the corner. Perhaps with all these changes, there is an opportunity to re-think how items are recorded. I'd suggest catalogers and librarians consider partnering with programmers and designers to imagine what's possible--workshops, seminars, discussion groups, etc.</td>
</tr>
<tr>
<td>77</td>
<td>There are far too many problems with WorldCat--unrecognized variants treated as one; simple mistakes that create the impression of non-existent variants, etc.</td>
</tr>
<tr>
<td>78</td>
<td>Thank you very much for your working with OCLC to make somewhat less disastrous adverse effect of their termination of IRs support.</td>
</tr>
<tr>
<td>79</td>
<td>It really does see that, sadly, copy cataloging is an increasingly devalued aspect of rare books. To OCLC and many institutions, who've somehow not feel strongly enough (outside the rare books community) to raise an objection OCLC responds to.</td>
</tr>
<tr>
<td>80</td>
<td>N/A</td>
</tr>
<tr>
<td>81</td>
<td>If lengthy records was not a consideration, I could imagine adding a section in the record for certain local information with library identifier. These would include fields ending in $5 [institution code]. Each such field would display as a separate line. The MELVYL catalog of the University of California once used such a feature to accommodate information supplied by individual university libraries.</td>
</tr>
<tr>
<td>82</td>
<td>I would like to know more about LBDs and IRs. Perhaps if I understood them I would want to use them. Thanks.</td>
</tr>
<tr>
<td>83</td>
<td>Explanation on questions 5-7: We have created LBD created as an OCLC batch from an export from our ILS. We also so do not plan to migrate the few IRs we had in addition as we also have LBDs from those.</td>
</tr>
<tr>
<td>84</td>
<td>Clarifying the rules for when to create a new record in OCLC for rare materials and in light of RDA would be exceedingly helpful. Currently, the conflation of issue/state on the same WorldCat record has led to a necessary reliance on local information. If OCLC would like us to use master records more frequently, these guidelines should be reassessed.</td>
</tr>
<tr>
<td>85</td>
<td>I mourn the loss of RLIN, but I don't think OCLC has an answer. I don't see another solution other than providing better links in OCLC to specific copies in local institutions.</td>
</tr>
<tr>
<td>86</td>
<td>Notre Dame records copy specific information in our local online catalog but not on WorldCat.</td>
</tr>
<tr>
<td>87</td>
<td>In #7, above, it was not I, personally, but my institution that made the decision and deleted our IRs.</td>
</tr>
<tr>
<td>88</td>
<td>N/a.</td>
</tr>
<tr>
<td>89</td>
<td>IR's were ideal for the purpose of cross-checking rare books. Sorry to see them go.</td>
</tr>
<tr>
<td>90</td>
<td>not at this time</td>
</tr>
<tr>
<td>91</td>
<td>I don't believe copy specific information belongs in WorldCat records.</td>
</tr>
<tr>
<td>92</td>
<td>Thanks for doing this survey</td>
</tr>
<tr>
<td>93</td>
<td>no</td>
</tr>
<tr>
<td></td>
<td>Keep the IRS!!!</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>95</td>
<td>Some of what I search for in the catalogs of other libraries is not copy-specific information at all, but more detailed information. I think sometimes a skimpy master record is not upgraded because it's not clear whether the item in hand is representative of that manifestation or whether the master record simply lacks sufficient detail to make a determination.</td>
</tr>
<tr>
<td>96</td>
<td>Because we catalog locally and the records are taped out to OCLC, I do not directly work in WorldCat. However, I think it is important to adhere to a principle of “no metadata left behind”. What do we have $$3 and $$5 for, anyway, if not to allow for some local information to reach the users?</td>
</tr>
<tr>
<td>97</td>
<td>I hope this effort is successful in retaining local information!</td>
</tr>
<tr>
<td>98</td>
<td>Implement links from the OCLC Connexion Client record to the institution’s local catalog.</td>
</tr>
<tr>
<td>99</td>
<td>test</td>
</tr>
</tbody>
</table>
Appendix E

BSC Directory of Internet Resources: Additions – January 2016

ADDITIONS:

http://rbms.info/files/dcrm/translations/dcrmb-es.pdf Unofficial translation of DCRM-B into Spanish, courtesy of the Universidad de Buenos Aires in Argentina

http://www.treccani.it/biografico/ Online Treccani

https://www.flickr.com/photos/bookhistorian/ Early initials from Paul Dijstelberge

https://provenanceonlineproject.wordpress.com/about/ POP, Provenance Online Program

http://www.cervantesvirtual.com/controladores/busqueda_avanzada_form.php Biblioteca Virtual de Miguel de Cervantes

http://catalog.hathitrust.org/Record/000140237 NUC Pre-56. For a table of contents for the 754 volumes see http://www.loc.gov/catdir/cpso/mansell.pdf here

http://www.vhmml.org/ Virtual Hill Monastic Manuscript Library, go to Education for paleographical resources in Latin and Syriac


http://www.lib.uchicago.edu/e/collections/maps/centraleurope18/ 18th century maps of Central Europe from the University of Chicago Library

http://manuscriptevidence.org/ --Research Group on Manuscript Evidence

http://lichen.csd.sc.edu/manuscriptlink/ Manuscript-Link, images of fragmentary codices

http://www.lostmss.org.uk/ Lost Manuscripts—including images
DRAFT AGENDA

ACRL/RBMS Budget and Development Committee, Midwinter 2016, Boston, Mass.

January 9, 2016, 1:00-2:30 pm, Westin Copley Plaza, Room Parliament

Members: Mary Lacy (Chair, Library of Congress), Danielle Culpepper (Rare Book School), Erika Dowell (Indiana U), Mark Greenberg (Western Washington U), Athena Jackson (U of Michigan), Jeffrey Marshall (U of Vermont), Blynne Olivieri (U of West Georgia), Mark Peterson (James Madison U), Arvid Nelsen (U of Minnesota), John Overholt (Harvard U), Cherry Williams (Indiana U), and Tory Ondrla (ACRL liaison).

Member attending virtually: John Pull (Congressional Research Service).

Members excused: Ethan Henderson, Fernando Pena.

Guests: Alison Clemens (Yale U), Martha Conway (U of Michigan), David Faulds (UC Berkeley), William Hansen (Newberry Library), Elsbeth Healey (U of Kansas), Eric Holzenberg (Grolier Club), Melissa Hubbard (Case Western Reserve U), Elizabeth Joffrion (Western Washington U), Henry Raine (NY Historical Society), E. C. Schroeder (Yale U).

1. Introductions, review of agenda, and approval of minutes

   The minutes of the committee’s meeting at ALA Annual 2015 were approved without amendment.

2. Leab Award Fund Report

   Leab Committee Chair David Faulds reported on the fund balances as follows:

   The Leab endowment principal is currently at $43,783.

   From September 1, 2015 – November 1, 2015, the first months of FY16, the endowment earned $336. There were $24 in bank charges. This leaves a balance of $312 in the spending account.

   There have also been $25 in donations between 9/1/15 – 11/30/15.

   FY15

   The endowment ended FY15 (September 1, 2014 – August 31, 2015) as follows:

   Interest earned: $1,514
   Donations received: $25
   Bank fees: $233
   Program allocation expenses: $163
   Postage expenses: $163
Interest earned plus donations received, minus expenses: $980 (this amount went back into the endowment’s principal).

The Leab endowment’s FY15 August close was $42,788.

3. Leab Award Long-Term Funding Plan

Schroeder encouraged the Section to push to get to the $50,000 minimum endowment balance mandated by ALA. We are on a good trajectory to meet the goal on schedule, but ALA has new financial people and our effort could get more scrutiny.

The options for funding within the Section include profit share from the conference and section funds. Leab Chair Faulds suggested that the Section plan to allocate $2500 each year for next two years, and then interest earned by the fund would contribute to meeting the goal. The fund earned about $1500 in FY15.

4. RBMS Conference Budget Reports

- 2015 Oakland

- RBMS 2016 set a record for the highest level of fundraising accomplished. Fundraising yielded $62,700 in donations, leaving $26,164 in conference profit. Half goes to ACRL and half to the Section.

- 2016 Miami/Coral Gables

  Fundraising is going really well, about $27,000 is lined up so far. This does not include the funds from the Booksellers Showcase which is a very significant source of support for the conference.

- 2017 Iowa City

  The preliminary budget for the 2017 conference will be approved by ACRL at this conference. No increase in registration costs is included for either the 2016 or 2017 conference. The fundraising goal for Iowa is $55,000.

  Ondrla suggested the committee and the Section think about building some profit into conference budget in order to help fund scholarships. The budgets for 2016 and 2017 do not have any profit built in. A vigorous discussion of this issue occurred at several points in the meeting, summarized below.

5. RBMS Conference Scholarships Update

- 2015/2016 Fundraising Results

  The scholarship account balance is now $4,908. From May to December 2015, the account received $1600 in donations.
Funding for 2015 scholarship came mostly from $13,082 in conference share cost-share (profit).

- Work plan for Future Fundraising

The committee engaged in a lively and wide-ranging discussion of the structure and funding of the RBMS conference scholarships. Topics and questions included:

Should we reconsider the purpose of scholarships? Should we use them to on-ramp people to committee service? Should we provide more comprehensive support for attending conference? Are there other ways to break down barriers to participating in RBMS committees, e.g. virtual meetings? Discussion at ACRL includes some people with the opinion that scholarships don't need to pay for everything; it is good for recipients to have to invest some of their own money. Some are concerned about people working at small institutions and in underrepresented groups, maybe we need some different kinds of scholarships? Maybe we need to require more professional investment from recipients, maybe require them to intern on committees or have a buddy or mentor? A little bit of mentorship could go a long way in getting scholarship recipients involved in the work of the Section, based on the experience with RBS Fellows. We should not discount the great impact that our current 20-person scholarship cohorts are having.

Should we build some fundraising for scholarships into the conference registration? Others noted that registration dollars are split with ACRL but donations to the scholarship fund go entirely to fund scholarships. Should we seek to build core purposes of the section into the section budget? We should be looking seriously for new grants on an ongoing basis.

Nelsen and Williams reported that the RBMS Scholarships Committee has been newly reinvigorated and are looking at many of these issues. This conversation is larger than any one committee and it should be led by the Scholarships Committee. Nelsen is encouraging them to have a public meeting to bring together interest in scholarships and opinion on what direction it should take.

Ondrla suggested the Section think about creating a fund raising committee to focus more attention on these efforts and spread out the work more effectively. Such a committee could work on all the conference fundraising, not just scholarships.

The committee will continue discussion of creating a fund raising committee. The topic will also be discussed at the RBMS Executive Committee meeting.

6. Proposals for Use of Section Funds

The current fiscal year began September 1, 2015. The RBMS allocation from ACRL was $1880. So far section funds have been spent on: $95 on postcard for Diversity Committee. Other proposals for section funding follow in this item and under New Business.

- Printing run for Your Old Books (YOB)

ABAA feedback on the latest revision is in and only minimal changes will be required.
There is no estimate of how much a new printing will cost. ABAA and Rare Book School are willing to help finance the printing, as they did last time.

A quote from last year put the cost at $2900 for 5,000 copies. The Publications and Communication Committee will work on getting a new cost quote and will forward it to the chair of the Budget and Development Committee with the goal of approving the package virtually.

The committee tentatively allocated up to $1000 from section funds for this purpose and will consider using conference profit share to help fund it, as well. First, there needs to be a real quote for printing costs, and a specific financial commitment from RBS and ABAA.

- Ongoing Reimbursement Requests (see below under New Business)

- RBMS Website Use of HTTPS

  Excerpted from a proposal from Alison Clemens, Kelli Hansen, and Elspeth Healey, RBMS Web Editors:

  “The Web Team proposes transitioning RBMS.info from HTTP to HTTPS, a secured version of the HTTP protocol. The HTTPS protocol encrypts data transmitted between a visitor's web browser and a website. This is accomplished by adding an SSL security certificate to the domain.

  We would be able to make this transition by using services provided by our current provider, DreamHost. HTTPS requires a yearly signed security certificate, which DreamHost would provide to us for $15/year. HTTPS would be added to the main rbms.info domain only (not the conference subdomains). The benefits for transitioning to HTTPS are: (1) Complying in providing a more secure protocol for online communication. (2) Avoiding possible down-ranking in Google search results.”

  The committee approved the additional expense of $15 per year, to be paid from Section funds.

7. RBMS Fundraising for 2016 ACRL Conference Scholarships

  Olivieri has an updated work plan for 2016 fundraising on ALA Connect. Volunteers for solicitations by email:

  - soliciting past scholarship recipients: Blynne Olivieri and Athena Jackson
  - soliciting past members of exec (March): Henry Raine and Margaret Nichols (Raine will ask Nichols to participate again)
  - soliciting general membership (Feb): current chair

  Raine suggested adding a donation button to the conference evaluation form. Ondrla said it would be easy to do and made a note to add it. Overholt advocated making a public statement of our fundraising goal and having a barometer to record our progress toward the goal.
The committee agreed to set the 2016 scholarships fundraising goal at $5,000.

8. ACRL Budget & Finance Update

No report.

9. Budget & Development FAQ

Sarah Schmidt was the last person working on this. She cycled off committee recently. Jackson will talk with her and see about moving it forward.

10. Other

None.

11. New business

- Controlled Vocabularies Editorial Group request
  
The group requested funding for an additional web hosting cost related to providing web access to their linked data project. Cost $10/month.
  
The committee approved $120 from Section funds for this purpose.

- Diversity Committee request
  
The Diversity Committee asked for $100 to print and mail more postcards.
  
The committee approved $100 from Section funds for this purpose.

- Donor opportunity
  
Nelsen received an expression of interest from a possible large donor. He will ask Mark Dimunation to visit the donor and find out more about their interest in supporting RBMS.
RBMS Collection Development Discussion Group
ALA Midwinter 2016, Boston
Saturday, January 9, 1:00-2:30pm
Westin Copley Place, Room Newbury
Draft Agenda

1. Welcome and Introductions

2. Review of Notable New Collections of 2015

3. Competition & Collaboration in Collection Development
   a. Examples of Competition & Collaboration
   b. Strategies
   c. Ethics

4. Open discussion

5. Suggestions for New Topics
ACRL RBMS Task Force to Review Competencies for Special Collections Professionals
Draft Minutes, 2016 Midwinter Meeting
Saturday, January 9, 2016, 6:00 – 7:30 PM
Boston, MA, Westin Copley Place, Room Essex South

Present: Cherry Williams (Indiana University); Jennifer MacDonald (University of Delaware); Allison Jai O’Dell (University of Florida); Alison Clemens (Yale University); Mark Greenberg (Western Washington University); Elizabeth Call (Columbia University); Mary Lacy (Library of Congress); J. Fernando Pena (Palmer School, Long Island University); Kim Tully (Temple University);

Guests: Martha Hovon (Yale University); Saia Belmonte (Congregational Library); Sarah Horowitz (Haverford College); Anne Bahde (Oregon State University); Lori Dekydrspotter (Lilly Library); Robin Katz (University of California, Riverside); Carly Sentier (Miami University of Ohio); Rachel D’Agostino (Library Company of Philadelphia); Anne Lonergan (Rutgers University); Angela Dressen (Harvard Villa I Tatti); Emilie Hardman (Houghton Library, Harvard); Kate Moriarty (Saint Louis University); Lisa Conathan (Yale University); Susan M. Allen (California Rare Book School); Lois Fischer Black (Lehigh University); Maggie Long (New York University); Veronica Reyes Escudero (University of Arizona); Louise Sherby (Hunter College, CUNY); Mott Linu (Clark University); Russ Taylor (Brigham Young University); Elizabeth Grab (University of North Carolina – Chapel Hill); Haven Hawley (University of Florida); Jennifer Sheehan (Grolier Club); Melissa McAfee (University of Guelph); Matthew Revitt (University of Maine); Christian Dupont (Boston College)

Introductions and Selection of Recorder
Allison Jai O’Dell agreed to act as recorder.

Discussion of the Draft Competencies Document
Highlights included:
- Discussion of the influence of the word “tradition”; semantics related to changing practice; desire for inclusivity of all communities; committee agrees to review instances where communities or expectations are defined
- Discussion of whether some competencies should be specific to certain practice areas; committee agrees to expand the general competencies, review alignment, and review organization of the document
- Audience expressed desire for expanded reference to educational opportunities; committee agrees to cut brief section on education and instead refer readers to educational resources provided by the Membership and Professional Development Committee
- Discussion of special collections competencies versus general library competencies
- Discussion of evaluation, assessment, and means to highlight user needs
- Discussion of the three-tier system
- Audience expressed desires to expand competencies regarding disaster preparedness, materials handling, exhibits, fundraising, and legal issues particular to special collections; committee agrees to review these topics
ACRL/RBMS Conference Development Committee
ALA Midwinter Meeting – Boston
Sunday, January 10, 2016 – 8:30-10:00am
Westin Copley Plaza, Room St. George AB

Draft Agenda 1/4/2016

1. Welcome and introductions

2. Approval of agenda

3. Approval of draft minutes from meeting at 2015 ALA Annual Conference San Francisco (see attached)

4. Future RBMS Conferences:

4.1. 2016 Miami (ALA in Orlando June 23-28) (Dekydtspotter/Sotelo)

4.2. 2017 Iowa City (ALA in Chicago June 22-27) (Overholt)

4.3. 2018 TBD (ALA in New Orleans June 21-26)

5. For reference:

- 2020 TBD (ALA in Chicago June 25-28)
- 2021 TBD (ALA in San Francisco June 24-29)
- 2022 TBD (ALA in Philadelphia June 23-28)
- 2023 TBD (ALA in Chicago June 22-27)
- 2024 TBD (ALA in San Diego June 27-July 2)

6. Future ALA Annual Conference Programs:

6.1. 2016 Orlando (Hansen)

6.2. 2017 Chicago (Overholt)

9. Old business


9.1.1. Timing of RFP

9.1.2. Establish subcommittee to update Manual

9.2. Use of ALA Connect

10. New business
The Controlled Vocabularies Editorial Group met Saturday, January 9, 2016 from 1:00 to 5:30 PM at the Westin Copley Place Hotel. Members Jane Carpenter (Co-Chair), Amy Brown, Amber Billey, Martha Lawler, Allison O’Dell, and Nina Schneider were present, as were volunteers Amy Tims and Brenna Bychowski.

The first portion of the meeting, which drew an audience of 30 Midwinter attendees, consisted of a special presentation by committee members Allison O’Dell, Amber Billey, and Amy Brown on their project to publish the RBMS Controlled Vocabularies as linked open data, in which they discussed the publishing options they explored, drawbacks and merits of each, and proposed strategy for moving forward. O’Dell, Billey, and Brown have chosen two content management systems, TemaTres or Vitro, to test this spring, and since both systems are fairly similar, will make their selection based on useability factors. If selected, the Vitro option will require a $10/month ongoing charge, and the group’s request to the RBMS Budget and Development Committee for funding has been approved. The publication of Controlled Vocabularies as linked open data is expected to be completed by Annual 2016.

The remaining portions of the meeting were devoted to discussion of 20 new genre term scope notes, which will now be posted on the Controlled Vocabularies Discussion Blog for feedback from the rare materials community, and pending final review, will be added to the Controlled Vocabularies in the next web update. Since summer 2015, the CV team has added 122 new scope notes to the Genre Terms vocabulary, with 140 additional scope notes expected to be completed by summer 2016, for a total of some 260 new terms. Completed at Midwinter 2016 were scope notes for:

- Anti-Masonic literature
- Apocalyptic sermons
- Artillery election sermons
- Autobiographies
- Books for the visually impaired
- Captivity narratives
- Chants
- Christmas sermons
- Clippings
- Comedies
- Anti-Semitic literature
- Appointment books
- Auction catalogs
- Awards
- Broadside poems
- Carol books
- Charters
- Class notes
- Coloring books
- Comic books

Carpenter reported that after many years of discussion, the integration of the six thesauri, a project led by Co-Chair Ryan Hildebrand, is expected to finally be completed by summer 2016.

Carpenter also reminded attendees that the Controlled Vocabularies Editorial Group is now an independent RBMS standing committee, and no longer a subcommittee of Bibliographic Standards Committee, although CV continues to work closely in conjunction with BSC.

Submitted by Jane F. Carpenter  
Co-Chair, Controlled Vocabularies Editorial Group  
January 12, 2016  
jfcarpenter@library.ucla.edu
The Midwinter meeting of the Curators & Conservators Discussion Group will focus on the topic of offsite storage for special collections materials, and the role of curators and conservators in regard to this issue.

Offsite storage has become very much an accepted part of the everyday workflow of many large public and academic libraries, as space becomes more limited and libraries are forced to change and adapt to the needs and desires of modern patrons. While there have been some controversies around the topic – think of the aborted NYPL plan to send their collections to New Jersey – the continued growth in print publication combined with shrinking space has made offsite storage an accepted reality. But where do special collections stand in the light of this debate? What are some of the concerns around sending special collections materials offsite? How do curators make decisions about what to send, and what considerations do conservators have to make in regard to these choices?

Please come prepared to discuss your thoughts and experiences, concerns and worries about this topic. We look forward to a lively discussion.

Beth T. Kilmarx & Charlotte Priddle
Co-chairs, Curators & Conservators Discussion Group
ACRL RBMS Curators and Conservators Discussion Group
ALA Midwinter Meeting 2016, Boston

Saturday, January 9, 2016
4:30 – 5:30 PM
Westin Copely Place
Newbury Room

Agenda:

The issue of offsite storage for special collections materials, and the role of curators and conservators in regard to this issue.

Attendees:
Priscilla Anderson (Harvard); Susi Barbarossa (Harvard); Sarah Bush (Simmons); Elise Calvi (Indiana); Moriah Caruso (Washington); Alex Choen (ACA); Tom Clareson (Lyra); Paula De Stefano (NYU); Laurel Gildersleeve (Harvard); Eleanor Godbey (Preservation Technologies); Elizabeth Grab (UNC Chapel Hill); Eva Grizzard (NEDCC); Marie Haltz (Center for Research Libraries); Elspeth Healey (U. Kansas); Martha Horan (Yale); Erika Jenns (Indiana); Alex Johnston (Delaware); Beth Kilmarx (Binghamton); Dory Klein (Simmons); Diana La Femina (J&L Lubano); Laura McCann (NYU); Carrie McGinnis (Harvard); Karla Nielsen (Columbia); Charlotte Priddle (NYU); Carly Sentieri (Miami U. of Ohio); Gioia Stevens (NYU); Sarah Sussman (Stanford); Kimberly Tully (Temple)

- Welcome and Introductions
- Group Business
  - Beth T. Kilmarx will be rotating off as co-chair; she and co-chair Charlotte Priddle requested that anyone interested in filling the vacancy get in touch with them.
- Discussion Topic:
  The agenda topic inspired a lively discussion wherein librarians from many institutions shared their thoughts, experiences, and concerns related to the issue at hand.
  - The group discussed many issues related to the issue of material transportation. Chief among these were methods of training moving staff, environmental fluctuations materials might face while en route, best practices for packing materials safely, security concerns, issues related to the actual method of transport (i.e. trucks, carts, vans, etc.) and challenges related to weather and other external factors.
  - Attendees noted the growth of offsite storage, with some institutions already contending with “one in, one out” policies. This led to a discussion of how materials
are selected for transfer at various institutions, and a look at what factors library staff might consider in addition to past use and condition. Among other things, instructional value, growing/changing scholarly trends, the “big picture” of the collection, and the nature of the specific offsite storage facility itself were all addressed.

- Workflows, efficiency, and practical considerations also played a central role in the conversation. Those present shared many experiences with their own selection criteria for the transfer of material to offsite storage. Some suggested that these criteria should be at least somewhat public, not only to encourage a degree of transparency but also to prevent the reasoning behind material transfers from existing only as institutional memory.

- Attendees also emphasized the important roles of intellectual control and descriptive catalogue entries in ensuring continued access to materials that have been removed from the on-site collection. In some cases, however, attendees noted that this standard of cataloging is not necessarily realistic, especially when materials already stored offsite are simply reclassified as rare.

- Attendees brought up many questions related to recalling materials after they have been sent off site, and especially whether offsite storage discouraged use. It was decided that, due to the call-ahead nature of many special collections libraries, the changing expectations of users, and the book delivery systems growing on many university libraries, it is difficult to measure or fully understand how differently users relate to books stored on versus off-site.

[Notes prepared by Carly Sentieri]
ACRL RBMS Descriptive Cataloging of Rare Materials Task Force
ALA Midwinter Meeting 2016, Boston

Friday, January 8, 2016, 8:30 am - 4:00 pm
Boston Convention and Exhibition Center, Room 208

Draft agenda

1. Welcome and introductions
2. Discussion: RSC working group for rare materials
3. Discussion: Treatment of printers or booksellers also functioning as publishers
4. Discussion: Attributions in RDA 2.17.3.3
5. Discussion: Facing / successive title pages (as sources of information)
6. Discussion: Transcription and interpolations (new RDA approach)
7. Discussion: Citations proposal
8. Ongoing editorial work: Publication, Distribution, Manufacture, and Copyright statements; RDA Chapter 3 elements (tbd)

Not all of the above topics will be discussed in the Friday session.

Visitors are welcome.

Francis
(chair)
Members present: Francis Lapka, Yale Center for British Art (Chair); Morag Boyd, The Ohio State University; Valerie Buck, Brigham Young University; Lori Dekydtspotter, Lilly Library, Indiana University; Christine A. DeZelar-Tiedman, University of Minnesota; Jane Gillis, Beinecke Library, Yale University; Matthew Haugen, Columbia University; Linda Isaac, University of Miami; Deborah J. Leslie, Folger Shakespeare Library; Iris O'Brien, British Library; Elizabeth O'Keefe, Morgan Library & Museum; Audrey Pearson, Beinecke Library, Yale University

Visitors: Marcia Barrett, University of California, Santa Cruz; Kate James, Library of Congress; Honor Moody, Schlesinger Library, Harvard University; Kate Moriarty, Saint Louis University; David Richtmyer, Boston College; Nina Schneider, Clark Library, University of California, Los Angeles; Elaine Shiner, Houghton Library, Harvard University; Amy Tims, American Antiquarian Society; Amy K. Weiss, Florida State University; Ryan Wheeler, Houghton Library, Harvard University

In the Friday morning session, the task force completed its first draft of guidelines concerning Publication, Distribution, and Manufacture Statements -- Resource Description and Access (RDA) 2.8-2.10.

The afternoon session began with discussion of a number of issues concerning references to published descriptions (i.e., 510 notes).

- Matthew Haugen led a discussion on follow-up steps for 6JSC/ALA/45 - Referential relationships: RDA Chapter 24-28 and Appendix J (http://www.rda-rsc.org/6JSC/ALA/45). The discussion focused on treating such statements as identifiers.
- Haugen also led a discussion on a possible revision to the MARC 510 field to include subfields $0 authority record control number, $2 source of citation/reference form, and $5 institution to which the field applies.
- Amy Tims discussed the American Antiquarian Society’s successful project to batch update 510 entries in their online catalog. The task force discussed whether the AAS approach could be repeated at other institutions.
The session concluded with discussion of the current state of the task force’s work. The task force has drafted guidelines for all of Chapter 1, most of Chapter 2, and some of Chapter 3. Chapter 3 includes a fair amount of format-specific instructions, which Lapka will review with the format specialists before reviewing with the group as a whole. Guidelines for copy-specific information (RDA 3.22) are probably the most substantial section for which work remains. Also still to be drafted are guidelines corresponding to RDA Chapter 0 (Introduction) and chapters concerning relationships.

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The Task Force convened for two days just prior to Midwinter (kindly hosted by the Houghton Library, Harvard University). In those sessions, topics of discussion included:

- The prospective RDA Steering Committee working group for Rare Materials
- Treatment of printers and/or booksellers functioning as publishers
- Publication, Distribution, and Manufacture statements (RDA 2.8 – 2.10)
- Attributions in Note on Manifestation (RDA 2.17.3.3)
- Facing/successive title pages as sources of information
- The distinction between recorded data and transcribed data in RDA
I. Call to Order, Introductions, and Selection of Recorder

II. Review and approve meeting minutes from Diversity Committee Meeting at ALA Annual 2015

III. Old/Current Business
   A. 2016 Seminars Proposal Update
   B. Reports/Updates from other Committees
      1. Scholarships
      2. Membership and Professional Development
      3. Other Committee Updates
      4. EMIERT’s Task Force to Create a Directory of Ethnic Archives
   C. Diversity Postcard Distribution
      1. Book Fair update
      2. Future distribution - request budget to distribute current card more widely?
      3. Redesign for 2016/7?

IV. New Business
   A. 2017 Seminars Proposal - brainstorming and volunteers needed
   B. New Diversity chair(s) beginning after ALA annual
   C. Seeking volunteers to implement priorities identified at ALA Annual 2015
      1. Coordinate with ALA for career support and awareness (ex. is there information programming on areas of librarianship at ALA that RBMS could contribute to?)
      2. Reach out to scholarship recipients and RBS fellows.
      3. Create a Diversity Blog (or feature diversity on RBMS blog)
      4. Site visits to MLIS programs in conference region. Reactivate Diversity Toolkit (offer ready-made powerpoint slides).
      5. Organize service projects
      6. Publicize the Diversity Committee beyond RBMS. Publicize Diversity statement (ex. in the Vade Mecum).
      7. Videos that feature the diversity of RBMS, personal profiles.
DRAFT AGENDA

RBM Editorial Board Meeting
ALA Midwinter Meeting – Boston
Sunday, January 10, 2016
8:30 a.m. – 10:00 a.m.
Westin Copley Square, Adams

VISITORS ARE WELCOME

1. Reminder for prospective volunteers to fill out ACRL form for volunteers, not RBMS
2. Status of open-access transition
   a. Increasing submissions/subscriptions while transitioning
   b. Circulation stats
3. Status of current submissions and upcoming issues
   a. Spring issue: special “digital vs. physical” issue
   b. Spreadsheet of submissions
   c. Status of design/insert
   d. RBM member survey results
4. Future meetings: virtual or in-person
   a. Meeting virtually for Annual
   b. Will take another poll when approaching Midwinter 2017 to see whether to keep same arrangement for future conferences
5. Board members: send Jennifer area(s) of interest/expertise willing to review for submissions
6. Other business?
Good afternoon,

Below is the agenda for the Exhibition Awards Committee meeting in Boston.

RBMS Exhibition Awards Committee Agenda ALA Midwinter Conference, Boston 2016

Locations: Westin Copley Plaza- Room Defender (Saturday & Sunday)

Part I:

Judging meeting

Saturday, January 9, 8:30-11:30 am

**Please note: this is a CLOSED meeting for committee members only

Part II:

A. Judging meeting

Sunday, January 10, 8:30-9:30 am

** Please note the first hour of this meeting is CLOSED for completion of the 2016 judging cycle if needed

B. Business meeting

Sunday, January 10, 9:30-11:30am

** Please note this meeting is open to all and all are welcome to attend

Agenda

1. Call to order

2. Designation of recorder

3. Introductions of members and visitors present

4. Announcements
5. Review and approval of minutes from the 2015 Annual meeting

6. Financial report
   A. Update on the Leab account
   B. Current expenditures

7. Review of 2016 award cycle

8. New business
Information Exchange Agenda

RBMS Secretary’s Reminders: Elizabeth Call

Programming Committees

2016 Conference Program Planning (Miami): Lori Dekydtspotter and Aislinn Catherine Sotelo
2016 Conference Local Arrangements (Miami): Cristina Favreto
2016 ALA Annual Conference Program Planning (Orlando): William M. Hansen
2017 Conference Program Planning (Iowa City): Melissa Hubbard and Julie McLoone
2017 Conference Local Arrangements (Iowa City): Greg Prickman

Committees and Task Forces

Archivist/Records Manager: Marten N. Stromberg
Bibliographic Standards: Nina M. Schneider
Budget and Development: Mary A. Lacy
Conference Development: Henry F. Raine
Controlled Vocabularies Editorial Group: Jane F. Carpenter and James Ryan Hildebrand
Descriptive Cataloging for Rare Materials Task Force: Francis Lapka
Diversity: Elizabeth Joffrion and Juli Marie McLoone
Exhibition Awards: David Faulds
Membership and Professional Development: Meghan Read Constantinou and Melanie Jean Meyers
2016 Nominating: Fernando Peña [or should this be 2017?]
Publications and Communications: Katharine Carrington Chandler
RBMS: Jennifer K. Sheehan
RBMS News Blog: Elspeth Healey, for Ethan A. Henderson
Scholarships: Melissa Nykanen
Security: Lois Fischer Black
Seminars: Sarah Horowitz

Task Force on the Development of Standardized Holdings Counts and Measures for Archival Repositories and Special Collections Libraries: Martha O'Hara Conway
Task Force on the Development of Standardized Statistical Measures for the Public Services of Archival
Repositories and Special Collections Libraries: Christian Y. Dupont
Task Force to Review Competencies for Special Collections Professionals: Jennifer MacDonald and Cherry Williams
Task Force on the Development of Guidelines for Primary Source Literacy: Heather Smedberg
Task Force to Review Guidelines on the Selection and Transfer of Materials from General Collections to Special Collections: Martha O'Hara Conway and Mark Greenberg
Web Team: Elspeth Healey, Melanie Griffin, and Alison Clemens
Workshops: Jennifer MacDonald

Discussion Groups

Collection Development: Marten N. Stromberg
Curators and Conservators: Beth Turcy Kilmarx
Digital Special Collections: Melissa Hubbard and Jason Kovari
Manuscripts and Other Formats: Erin C. Blake
Public Services: Julia Gardner and Sarah Horowitz
Technical Services: Ann K. D. Myers and Melissa A. Torres

Liaisons

ACRL Budget and Finance: E. C. Schroeder
ACRL Communities of Practice Assembly: Cherry Williams and John Overholt
American Printing History Association (APHA): William T. La Moy
Antiquarian Booksellers’ Association of America (ABAA): William M. Hansen
Bibliographical Society of America (BSA): E. Haven Hawley
Committee on Archives, Libraries, and Museums (CALM): Beth Turcy Kilmarx
Government Documents Round Table (GODORT): Elizabeth A. Sudduth
Maps and Geospatial Information Round Table (MAGIRT): Nancy A. Kandoian
Society for the History of Authorship, Reading, and Publishing (SHARP): Diane M. Maher
Society of American Archivists (SAA): Jackie Dooley
Association of Research Libraries (ARL) Special Collections Working Group: Jackie Dooley

Other Professional Organizations

California Rare Book School: Susan Allen
Center for Bibliographic Studies and Research (CBSR): Brian Geiger
Diasporic Literary Archives Network: E. C. Schroeder
Grolier Club: Jennifer K. Sheehan
International Federation of Library Associations and Institutions (IFLA): E. C. Schroeder
Rare Book School (University of Virginia): Danielle Culpepper

Announcements
AGENDA

1. Introductions and Lightning Round: Share an update, innovation, or event from your organization.
2. Using archival methods to describe and manage print collections. Have you used finding aids, or been inspired by principles of archival description (including context, inheritance, or description in the aggregate) to handle print materials? Share your thoughts on how this has worked, and learn from others experimenting with these methods.
3. Items arising.
4. Proposals for future topics.
AGENDA

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3. Items arising.
4. Proposals for future topics.

Attendees:
Erin Blake (Folger Shakespeare Library), Sarah Bush (Simmons College), Lisa Conathan (Chair, Yale University), Paula De Stefano (New York University), Molly Dotson (Yale University), Diana Duncan (Field Museum), Asheleigh Folsom (Georgetown University), Eva Grizzard (NEDCC), Julie Grob (University of Houston), Kelli Hansen (University of Missouri), Alex Johnston (University of Delaware), Mary Lacy (Library of Congress), Tim Murray (University of Delaware), Katy Rawden (Temple University), Elaine Shiner (Harvard University), Christopher Smith (Yale University), Russ Taylor (Brigham Young University), Amy K. Weiss (Florida State University)

Lisa Conathan convened the meeting at 3:00 and those present briefly introduced themselves, providing updates on recent activity at their institutions and expressing their goals for the discussion group. Topics of interest arising out of introduction included collection tracking and management strategies, especially during renovations or moves; and crowd-sourced approaches to interacting with the public. The group addressed neither topic, however, since a lively discussion ensued on the topic proposed in the agenda.

The group discussed various approaches used at representatives’ institutions to manage, describe, and provide access to print material using archival methods. One common approach is to list printed material in a finding aid rather than create individual catalog records for each item. Material listed in finding aids ranges from personal libraries that accompany manuscript collections (see, for example: www.lib.udel.edu/ud/spec/findaids/colish.htm) to collections of pamphlets or ephemera (see, for example: http://hdl.handle.net/10079/fa/beinecke.ndy36). Several participants expressed a concern for balancing the greater detail that is possible through item-level cataloging with a desire to be able to reconstitute a collection virtually or physically (e.g. through the use of local subject headings or a common call number). Motivation for using archival approaches includes: 1) enhanced utility for researchers who want to study material in groups 2) efficiency of staff time.

The discussion also encompassed material that may be described as both ‘print’ and ‘manuscript,’ for example, a printed item with a manuscript laid in, or with extensive annotations. Participants described various approaches to such material, including creating separate accession and/or catalog records.

[Notes prepared by Lisa Conathan]
DRAFT AGENDA

RBMS Membership & Professional Development Committee
ALA Midwinter Meeting – Boston
Saturday, January 9, 2016
8:30 a.m. – 10:00 a.m.
Westin Copley Plaza, Empire

VISITORS ARE WELCOME

Agenda

1. Welcome and Introductions
2. Selection of Recorder
3. Liaison Reports
   a. ACRL Membership Committee – M. Constantinou / M. Meyers
   b. RBMS Scholarship Committee – S. Supple for M. Nykanen
   c. RBMS Diversity Committee – K. Tully
   d. Book Fair – C. Morrison
   e. Core Competencies in Special Collections Librarianship Task Force – J. MacDonald
4. Ongoing Projects
   a. Educational Opportunities Directory – C. Jacobs
   b. Buddy Program Report – K. Tully
   c. Mentoring Program – P. Olson
   d. Career FAQ – M. McAfee
   e. Member Survey – E. Healey
5. Committee Website – A. Clemens
6. Letters to New Members – M. Meyers
7. RBMS Conference Planning
   a. Conference Orientation – M. Meyers / M. Constantinou
   b. New Members’ Mixer – T. Ondrla
   c. New Members’ Brown Bag – J. Dean
      i. Discussion on new format
   d. 2016 Discussion Group on Work/Life Balance – M. Meyers
   e. Future Programming
8. New Volunteers and Volunteer Opportunities
a. 2017 RBMS Conference Planning Committee Liaison (Iowa City) – Patrick Olson
b. Scholarship Committee Liaison—Brittany Adams
c. Buddy Program (2 volunteers)
d. Diversity Committee Liaison?
e. Brown Bag Lunch Coordinator?

9. New Business
   a. Dropped Member Survey
1. Welcome and Introductions

2. Selection of Recorder – Erika Jenns

3. Liaison Reports
   a. ACRL Membership Committee – M. Constantinou / M. Meyers
      M. Meyers relayed that Section membership committee is meeting virtually, hasn’t happened yet. Much of the work of that committee has been in discussion of transition plans and keeping statistics for each section. Will keep everyone posted as to relevant items.

   b. RBMS Scholarship Committee – S. Supple for M. Nykanen
      Committee has drafted updated criteria to be used for evaluating applications and developed guidelines for selection of candidates. These
new documents will be voted on at the Executive Committee meeting. If approved, they will be used this year. Some other issues of interest to scholarship committee: How can the program better serve early and mid-late career librarians? Also, weighing the benefits of collaborating with Rare Book School about this. Applications for scholarships for Coral Gables are due Mar. 25th for this year.

There was a concern about individuals who apply for scholarships but don't register because they are waiting to hear whether they received the scholarship. T. Ondrla clarified they we can issue refunds for scholarship winners, but we should encourage people to register. We also will hold back a block of registrations for scholarship applicants.

c. **RBMS Diversity Committee – K. Tully**
There will be a diversity sponsored seminar in Coral Gables, organized by Curtis Small. At annual, there was discussion in thinking about new ideas to diversify – for example, coordinate with ALA for career support and awareness, reach out to scholarship recipients, future diversity RBMS blog, site visits to programs to reactive use of diversity toolkit, organizing service projects, and creating videos featuring diversity of RBMS.

d. **Book Fair – C. Morrison**
There has been one book fair since annual, which occurred in Boston in November. The fair went smoothly, there were no problems recruiting volunteers.

e. **Core Competencies in Special Collections Librarianship Task Force – J. MacDonald**
It was reported at annual that there would be a survey, but the task force decided against it. The document was put online. They received comments (mostly from the Archival community). There will be a public hearing on 1.9.16 at 6 pm. The document should be ready for both the executive and standards committee to review before annual.

4. **Ongoing Projects**
   a. **Educational Opportunities Directory – C. Jacobs**
Courtney was absent, and Alison Clemens provided a summary in her place. All institutions have been contacted to insure that info was up to date. The entire list is now up to date.

b. **Buddy Program Report – K. Tully**

For winter 2015, there were 7 matches, For Annual 2015, there were 22 matches. At both conferences 2 buddies took on an extra buddy. We started using sign-up genius, the new format has worked well, modeled after ACRL system. For post-match evaluations, there were 28 respondents and evaluations were generally positive. Participants seem to hear about the program primarily from the RBMS listserv. Most respondents liked the new system. One person did not like the new system.

Also of note: One respondent missed having introductory emails after being paired; Participants enjoyed meeting with their buddies at the book fair, new members lunch, etc; There were 4 requests for Midwinter 2016, everyone was matched. C. Priddle set up a new Gmail address for the program. T. Ondrla has an evaluation form that she offered to share with the group to be used as follow-up to the buddy program.

**Action Item:** Add language giving potential buddies the option to contact the coordinator directly instead of listing their email address publicly.

c. **Mentoring Program – P. Olson**

Currently, we have 15 active mentorships, 7 pairs have expired since Annual 2015, though many people continue to keep in touch. We usually hover around 18-19 matched pairs. Other items of note: All mentees are currently matched; the matching process rarely takes more than a month; we have had 10 mentor applicants since Annual – we have a surplus of mentors for the first time ever. Responses to the exit survey were overwhelmingly positive. A suggestion was made that reminders to check in would be helpful for both mentors and mentees.

Other suggestion: Can we build from the buddy program to the mentor program? If a buddy match was successful, can the relationship continue? How can we advertise the mentorship program without scaring people away?
Action Item: Add something about the mentorship program to the Buddy Program follow-up survey. T. Ondrla has a list of the people who attend the first-time attendee orientation, which could help promote the mentor program.

Suggested at Annual – highlighting some mentor/mentee stories. Can we create a list of 5 questions and ask the mentors and mentees to answer them, then post the responses to the Chair’s blog? Focus on the idea of telling individual success stories. We can email past mentors to ask them to participate again.

d. Career FAQ – M. McAfee
Melissa, Alison, Anna, and Christina reviewed the current career FAQ and prepared a new list. They have shared it with the task force on competencies but have not yet received feedback. They plan to share the new document with the committee via email in the upcoming months so that everyone will have time to dedicate to reviewing it and providing comments. The revised document should ready for approval by Annual.

e. Member Survey – E. Healey
The data report from last spring’s membership survey is ready and has been shared with Meghan and Melanie; there is also an article for RBM in the works. The committee requested volunteers for new people to continue on with the survey. The 60-question survey should be given again in 2020, but there should be a small subset of questions to send out more frequently before 2020. Send something out in 2016-17.

There were also questions of managing on-going access to the most recent survey data. The survey used Qualtrics – the section/committee could get a subscription, but it will require ongoing funding. Otherwise it will need to be exported to someone else with access to Qualtrics. We need to keep access to the data while ensuring privacy of respondents.

Item for future discussion: There are no questions on the survey regarding sexual orientation as of right now. Do we want to add a question? Also to be discussed: how to retain geographic information while also maintaining anonymity; possibly moving the survey from Qualtrics to Survey Monkey? (ACRL uses Survey Monkey); how does this fit in with our documentation
for the section? Is there a documentarian function? Can we explore this as a solution to long-term section commitment? The survey is a section responsibility and doesn’t necessarily need to be the sole responsibility of M&PD.

**Action Item:** Meghan will follow up with questions for archiving the survey at Exec.

5. **Committee Website – A. Clemens**
   No major updates. Call for volunteer to act as a liaison.

6. **Letters to New Members – M. Meyers**
   M. Meyers will send an email to the committee with a summary of how things went this year, after ACRL posts its December membership statistics. We tend to see spikes right before registration for conferences and at the end of the calendar year.

7. **RBMS Conference Planning**
   a. **Conference Orientation – M. Meyers / M. Constantinou**
      The speed-dating style will continue in 2016. A consensus was reached that we should put up pictures of chairs during this session, which was not done in 2015. The request for table-top signs was declined in favor of hand-held signs which are better for a crowded room. We must emphasize that you can be a committee member without travelling to every conference! This issue is also on the agenda for Exec. Agreed to expand handouts that describe committees to include committee charge.

   b. **New Members’ Mixer – T. Ondrla**
      General consensus on the success of the 2015 event. For Coral Gables, it may be outside or in the Danielson Gallery. Last year, there was a good amount of non-new members who came; we want to encourage that again. It will be priced at $25 again. We also have a sponsor to help offset the costs.

   c. **New Members’ Brown Bag – J. Dean**
      Due to the venue, the 2015 brown-bag lunch will be incorporated into the boxed luncheon on Wednesday. Cost: $18 for box; these can be purchased on the registration form. As always, we will need to solicit a few seasoned
members to attend. J. Dean will act as liaison with the front desk/local arrangements.

d. **2016 Discussion Group on Work/Life Balance – M. Meyers**
Need suggestions for someone (especially male) to talk about things that are not related to maternity leave, such as taking care of an aging parent, or moving for a partner. Will this session include discussion of your daily life as well?
There will also be a lunch meet-up on Wednesday: “No I don't want to take notes, managing sexism in the workplace." M. Meyers is setting up a Google Form to collect anonymous responses.

e. **Future Programming**
A reminder that M&PD traditionally submits something for RBMS conference. Ideas for future are welcome. The deadline for seminars is fast approaching (mid-June).

### 8. New Volunteers and Volunteer Opportunities

a. **2017 RBMS Conference Planning Committee Liaison (Iowa City) – Patrick Olson**

b. **Scholarship Committee Liaison—Brittany Adams**

c. **Buddy Program (2 volunteers).**
Melanie Griffin and Danijela True will take over from Charlotte Priddle and Kimberley Tully following Annual.

d. **Diversity Committee Liaison (1 volunteer)**
One volunteer is still needed.

e. **Brown Bag Lunch Coordinator (1 volunteer)**
Jason Dean has agreed to help us out this year, but we will need someone for next year.

### 9. New Business

a. **Dropped Member Survey**
We want to send a survey to people who have dropped their membership. We don’t have to do this long term, but we want to establish a baseline of why people are leaving. It will not contain demographic info, and will be very brief to encourage responses. Committee reviewed the proposed questions and added: more response options to those questions that are currently yes/no responses – yes, no, unsure, and add free-text response OR add a likert scale.

  i. Question 1 – Add an option “I do not work in the special collections field” – reflect this addition in other questions.

  ii. You can be a member but still not be able to attend the conference – We need to add a question about conference attendance.

**Action Item:** Melanie will incorporate these changes and will email it out next week.

*b. Other new business*

Can M&PD facilitate finding roommates for conferences, ride shares, etc? This cannot be officially sponsored by ALA/ACRL/RBMS, but perhaps we could address it unofficially. The listserv is also an option but should not be encouraged. Agreed to think on it, and try and come up with a way to connect people.

Meeting adjourned, 10am.
Digital projects and how they influence public services. Are you hoping to bring people into the reading room? Are you reaching scholarly researchers or the "general public"? Do you ask people to contribute to these projects?

Digital version help people triage research visits. But there is difference between mass digitization and digital projects. They connect their digital objects to finding aids, so researchers can click on digital versions automatically; they also put a sticker on the boxes which house the originals.

There is a new Chicago portal which allows researchers to search across institutions. No one-size fits all for digitization. They tend to focus on pedagogical and interpretive materials.

Using undergraduates to undertake digital projects, the students do metadata and OCR. They find digital versions bring people into the reading room.

Focus on value-added projects in collaboration with digital scholarship.

Digital exhibits are a way to make on-site ones more permanent, add further materials and go more in-depth.

How do people track whether visitors are brought in by digital projects? Some people ask this on the sign-in form. But something as general as “found you online” is not helpful, as could mean either Google or library ContentDM site.

How are people dealing with copyright and 20th century materials for digital projects? Donors can only turn over so many rights. Reference to ACRL and OCLC guidelines. New York Public Library recently put up all orphan works; many institutions are becoming less restrictive.

We need a plan to update our rights use statements, both to explain to people that we don’t use that anymore and for DPLA opening. Some people have moved to “notification” for use rather than a permission form.
Are people collecting statistics on how their materials are used? Can query Google Scholar for this. What does this data get used for? Some use it for grants.

*Working with younger patrons such as K-12 visitors, history fair students, etc. What works or doesn't? What unique issues does this pose? Examples of creating content for these types of patrons?*

Newberry has an age limit of 16, which presents a real problem working with history fair students. Have recently had a parent come to use materials and facetime with their student.

Center for Jewish History: Before 16 need to have a parent with them. Sometimes a whole family will come if someone is doing genealogy.

Young children are not the only ones who don’t know or need to be reminded how to use materials. Sometimes they can be more respectful than other researchers.

History day projects often work well if classes come with their teachers, or come in groups.

Historical Society of Pennsylvania has a National History Day program in which volunteers mentor students, to help keep the burden off staff.

Some people have packets or digital collections for national history day which can be sent to teachers.

How do institutions use volunteers? Issues of time for training -- many of the types of projects we used to use volunteers for are not longer a priority. Problem of deprofessionalization, including paying graduate interns.

What about digital cameras versus staff time for making copies? Students all have digital cameras and don’t think of social media as “publishing.” Can or should we restrict use on Instagram, etc.? Should we lend cameras to encourage people to take their own photos?
RBMS Publications and Communications Committee Meeting  
Saturday, January 9, 2016  
1:00-2:30pm  
Westin Copley Plaza, Room: North Star

DRAFT AGENDA: Publications and Communications Committee Meeting

I. Call to order
II. Selection of Recorder
III. Reports from working groups and ex-officio liaisons
   a. Web Team—Alison Clemens, Kelli Hansen, Elspeth Healey
   b. Documentarian—Kate Hutchens
   c. News Editor—Ethan Henderson
   d. Listserv—Everett Wilkie
   e. Controlled Vocabularies—Ryan Hildebrand
   f. “Your Old List” subcommittee report (this subcommittee is tasked with developing protocols for the RBMS and ExLibris lists)
IV. Old and Ongoing Business
   a. Your Old Books printing
V. New Business
VI. Announcements

Adjournment
RBMS Publications and Communications Committee Meeting
Saturday, January 9, 2016
1:00-2:30pm
Westin Copley Plaza, Room: North Star

DRAFT MINUTES: Publications and Communications Committee Meeting
Saturday, January 09, 2016, 1:00-2:00 (adjourned early, meeting slated until 2:30)

Members Present: Lori Deykdspotter, Alison Clements, Kelli Hansen, Elspeth Healey, Kate Hutchens, Patrick Olson, Timothy Shipe

Visitors Present: Will Hansen, Elizabeth Joffrion, Jocelyn Karlan, Sara Logue, Jennifer Sheehan, Christopher Smith

Minutes recorded by Kate Hutchens

I. Call to Order
   a) Meeting being led by Elspeth Healey, for Publications and Communications Chair Katharine Chandler, who was unable to attend
   b) Elizabeth Joffrion participating as member-at-large from Exec

II. Selection of Recorder and Introductions
   a) Minutes recorded by Kate Hutchens
   b) Any non-members encouraged to consider volunteering to be on the committee

III. Reports from Working Groups and Ex-Officio Liaisons
   a. Web team: Alison Clemens
      i. The RBMS.info site and social media platforms continue to grow, and resources and editing permissions for committees on the new WordPress platform continue to expand.
      ii. Audrey Pearson of Bib Standards has been migrating Latin place names and the migrated resource will launch soon; Bib Standards in midst of determining future of Controlled Vocabularies platform in a concurrent meeting
      iii. The Task Force to Review Competencies for Special Collections Professionals created documents using the digress.it WordPress theme to enable outside review of their drafts. Digress.it is no longer being updated, so the web team will be looking for another platform to enable this type of work in the future
      iv. The Web Team relies on RBMS committees to help keep their committee content current; please feel free to send any content updates to your web liaison or the web team
      v. Please contact Web team members with questions at editor@rbms.info. The full Web Team report is available on the Minutes and Agendas page (under Publications and Communications, Web Team)
   b. Documentarian: Kate Hutchens
i. 2015 RBMS conference recordings are in the midst of being processed
ii. Question from Will Hansen: Should the Documentarian be in charge of recording the ALA Program as well?
   -Could be added to guidelines
iii. Suggestion from Elspeth: What about codifying the process, procedures, and guidelines for recording on the website?
iv. Issue of perennial question of how to collection presentation materials. Should this be pre-determined and added to guidelines?
   -Kate will bring this up to Conference Development to see about getting a decision and guidelines for the process/responsibility for gathering presentation materials from speakers added to the official Conference Planning Manual; Elspeth reported that Henry Raine is in the process of revising the manual, so perhaps now is an ideal time to suggest adding new guidelines regarding the role of the Documentarian.

c. News Editor: Elspeth Healey for Ethan Henderson
   i. Continued submissions of jobs, major acquisitions, and other RBMS-related news items are welcomed. Please submit your newsworthy items (via Word attachment) to the Editor at news@rbms.info

d. Listserv – Elspeth Healey for Everett Wilkie
   i. RBMS list has just over 1,400 members and continues to grow slowly.
   ii. Everett has been the RBMS list moderator for many years (since its inception) and is ready to retire; he would like to be out of the position by Annual, so PubComm is on the hunt for a new listserv moderator
   iii. It would be ideal if this could go through along the normal appointment schedule; We’ll send out an announcement to the listserv to recruit; the moderator could be ANYBODY that is a current member of RBMS who is willing to do the job
   iv. Moderator becomes Ex Officio member of PubComm
      a. Will this be forever?
      b. No. Moderator and News Editor will now be term-limited via ALA determination reported at Midwinter last year; anyone serving in these positions can serve two consecutive two year terms with a maximum of five consecutive years

e. "Your Old List" subcommittee report: Lori Deykdtspotter
   i. Subgroup: Lori Deykdtspotter, Melanie Meyers, Heather Dean
   ii. The group has held one meeting in which Everett participated
   iii. Protocols
      a. What can be posted on the RBMS listserv and in what form?
      b. Current guidelines regarding topics permitted on listserv appear as part of Listserv page (on rbms.info); the original source of these guidelines unknown and it may be worth contacting the Executive Committee regarding this
      c. RBMS Manual does not give very much guidance on subject of Listserv

Discussion:
iv. It has come up at Exec and in other venues that folks are interested in expanding topics permitted on the listserv (Chris); comments outside stated topics get curtailed by Moderator
v. Concern over becoming more broad; example of SAA having trouble with a more liberal protocol and people abandoning the list (Elizabeth J)
   a. How is SAA list different from RBMS relative to ExLibrs-type content (dealers, vendors, etc.)?
vi. What about CFPs and fellowship announcements? Is this the kind of content that should be fostered?
vii. What about a specific subscription option to the News Editor’s blog or setting up an automatic email to the whole list from the News Editor’s blog maybe once a week as a digest?
viii. What is the role of the moderator in terms of tactics of policing?
   a. The Listserv is not technically moderated (pre-vetted before any member actually sends)
   b. What if folks are reluctant to post due to moderation approaches?
ix. One reason for expanding scope has been to create a more gentle / welcoming discussion among fellow professionals since on some other lists the troll-ish responses can sideline discussions
x. What are the reasons to be concerned about whether people leave the list
   a. What would people involved in RBMS miss if they did leave the list? What’s the risk factor?
xi. What about discussion group lists?
   a. DCRM has a list
   b. Possibility of having more informal lists that aren’t officially sponsored
   c. The information on these lists could be posted to the discussion group pages on the RBMS site and members could elect to opt-in

f. Controlled Vocabularies: Elspeth Healey for Ryan Hildebrand
   i. The CV group has been working with the Web Team to evaluate new platforms that will allow them to implement linked open data
   ii. At present, the working group’s recommendation is a self-hosted solution on RBMS servers, and they recommend testing out two potential platforms before making a final selection: TemaTres and Vitro. As previously noted, the CV group is meeting concurrently to discuss this

IV. Old and Ongoing Business
a) Your Old Books
   i. Budget & Development would like to know about the printing of a new run of the revised version of Your Old Books (RBS and ABAA are eager to have more to distribute)
   ii. ABAA members appointed a three-member subcommittee to review the revised text on the YOB digress.it site and submitted textual content revisions in November
1. They also are interested in trying to refresh the design of the brochure with “a broader palette”—the major use of this brochure is at the RBMS table at book fairs, so the question is how to make this something that folks don’t just pick up and put back down again.

2. ABAA are underwriters of this printing, along with RBS and ACRL/RBMS.

   iii. No suggestion of major revisions (per few Digress.it amendments/comments), so that’s good news for reprinting

   iv. Issue of who holds the original (Adobe Pagemaker?) file, with design elements, for editing and printing; issue of who will assist with design elements. Susan Benne was the ABAA member who made the design suggestion, so she may be able to help.

   [Post meeting note from Elspeth: At the Budget and Development meeting, Tory Ondrla from ACRL also mentioned that ACRL may be able to assist with design.]

   v. Cost could go down based on new vendor? Budget and Development meeting minutes from the last time that YOB was printed show that the printing went through ACRL cost approximately $3000 for 5000 copies.

      1. B&D is meeting concurrently, and we hope to have a liaison check in with them at the end of the meeting.

   vi. Are there issues of logos and branding might need to get approval by Exec before printing? ALA/ACRL has issued new regulations for branding on websites, and some of these issues might transfer to Your Old Books

   vii. Question of the status of the Your Old Books Revisions Subcommittee. It last convened circa 2013, so many of its members may have cycled off?

   viii. Will Hansen reports that ABAA would like to have new copies to distribute at the New York Book Fair in April, so there is a fast-approaching deadline.

V. New Business

   a. There is an article on Wikipedia about RBMS that Everett Wilkie wrote and has been updating

      i. Everett wonders if Exec would like to give formal responsibility for maintaining the article to PubComm and he suggests that it be linked to the RBMS homepage

      ii. Attendees suggested that the Social Media Team (sub-team of Web Team) might be suited to take charge of this

         1. Elspeth will take this to Katharine and Social Media group, and hopefully they’ll just check in with Exec about this

         2. Elizabeth J notes this for Exec, as well

VI. Announcements

   a. RBM update (Jennifer Sheehan)

      i. New issue coming up in Spring

      ii. Looking at moving to an open access model

      iii. Editorial board: new structure to avoid having to travel to meetings twice a year

      iv. Looking for any last minute submissions
b. The Web Team is looking for new assistant web editor
   i. Trajectory is Asst. Web Editor to Web Editor to Sr. Web Editor: there’s always some continuity
   ii. HTML and Wordpress are helpful to know. It’s a good opportunity to build web skills and also to learn about the section!

VII. Meeting Adjourned early, circa 2:05pm
The RBMS Scholarships Committee will be holding a virtual meeting on Wednesday, December 9th, from 11am-12pm PST. All are welcome to attend. If you would like the login details to attend the meeting via Adobe Connect, please contact me at melissa.nykanen@pepperdine.edu. An agenda follows below:

RBMS Scholarships Committee Virtual Midwinter Meeting
December 9, 2015
Agenda
1. Welcome
2. Designation of a recorder
3. Introductions
4. Criteria and methodology for selection of scholarship recipients
5. Promotion of scholarship opportunity
6. Usage of scholarship essays
7. Collaboration with Rare Book School

Many thanks,
Melissa

--
Melissa Nykanen
RBMS Scholarships Committee Chair
Pepperdine University Libraries
AGENDA

I. Welcome and introductions

II. Minutes of the last meeting and approval of agenda

III. Chair’s report

IV. News from individual institutions

V. Project updates
   a. Incidents of theft: review of format
   b. Security audit release: feedback
   c. Inventory best practices: status
   d. State Laws project: status reports
   e. Website design and updates

VI. 2016 RBMS Conference Seminar (Miami)

VII. Revision of security guidelines: working session
    -reminder about availability of google doc
    -ongoing additions/revisions to sections (ownership marks; use of special
     collections materials in classroom settings; security needs of small institutions;
     other)

VIII. New Joint Task Force under development: ABAA/RBMS/ACRL/ALCTS

IX. New business

X. Adjournment
RBMS Seminars Committee Draft Agenda

ALA Midwinter Meeting 2016, Boston
Sunday, January 10, 2016
1:00 pm - 2:30 pm
Location: Westin Copley Plaza, St. George CD

1. Call to order

2. Introductions and selection of recorder

3. Share any changes/adjustments to 2016 session information

4. Review proposed dates/times of seminars in the conference schedule

5. Explain process for assigning onsite coordinators for seminars

6. Deadline for submitting seminar proposals for 2017 conference: June 3

7. Brainstorm ideas for the 2017 RBMS conference

8. Other business
Introductions and Selection of Recorder
Kim Tully agreed to act as recorder.

Changes/Adjustments to 2016 Session Information
Any changes/updates to seminars must be submitted to the conference planning team asap as the conference site will be live in approximately two weeks from Midwinter Meeting, also AV requirements if beyond the typical must also be requested asap

Addressed question of time allotment for Q&A session from seminar organizer (approximately 20-30 minutes ideally).

Review of Proposed Dates/Times of Seminars in the Conference Schedule
There were no issues with timeslots. There will be fewer concurrent sessions this year and attempts to not have competing topics. Conference capped at 400 attendees this year

Process and Responsibilities for Onsite Coordinators for Seminars
Onsite Coordinator works with the seminar organizer to provide AV help, check in with speakers, and provide feedback to the chair on how things went (timekeeping, attendance, etc). They will also liaise with moderators to assist in timekeeping and other issues.

Deadline for Submitting Seminar Proposals for 2017 Conference is June 3rd
2017 Conference theme is Storytelling, but seminars do not have to be on the theme. The Committee traditionally will accept a few late proposals that come out of programs/discussions at the 2016 RBMS Conference.

Brainstormed Ideas for 2017 RBMS Conference Seminars
Project management
Directors in their first 30/60 days, including how to work with new directors, role of new director from multiple perspectives

Managing the definition of success - how to grow in your current position without moving into a management position

Money in special collections - case studies by development officers, storytelling in fundraising, special collections as bridge to development, looking critically at development and its effect on collecting and processing priorities

Special collections and digital humanities intersections, including lessons learned from working on documentaries and multimedia projects, storytelling and oral history projects

The stories we can’t tell (such as topics related to security, restrictions and communicating about theft)

Cataloging work done in other departments and workflow issues

Talking about failure in special collections

Generational differences in the profession

Language accessibility issues - telling stories in different languages and telling cultural stories (instruction component)

Media relations - the state of storytelling about special collections

Programming tools and how they can be useful in our work (maybe a workshop?)

The wonder of digital archives; related: working with the public using e-mail collections, born-digital materials and distance reading

Distant reading as a general topic

Student internships/graduate assistants and student engagement in special collections work

Early career professionals and diversity topics (temporary positions as stepping stones, i.e., resident librarians), possibly related to Dropped Member Survey that M&PD Committee will be undertaking

Difference between “librarians” and “archivists” and the rhetoric around it (maybe better as a discussion group), benefits of a blended department, cf. CALM

Doing assessment on your own, maybe something coming out of the RBMS/SAA task forces related to assessment, what do we get out of assessment and how does it help us tell stories
Disaster planning - perhaps related to Iowa City floods in 2008, lessons learned, how do we help our neighbor institutions

HR evaluation of early career, performance reviews, translating library speak to HR, maybe tied to new Core Competencies

Open access and special collections

(At the end of the brainstorm session there was a brief discussion of linking these minutes to the CFP, especially to assist with first-time proposer, but the committee was cautious about appearing proscriptive)

Meeting adjourned
Technical Services Discussion Group – DRAFT Agenda

Sunday January 10, 2016 10:30-11:30

Westin Copley, Room St. George CD

1. Introductions

2. Bibrame and Linked data: In what ways have people begun to anticipate Bibframe or institute other linked data initiatives? Have institutions begun training staff?

3. Authority work: How do special collections institutions handle authority work? How many institutions contribute NACO records? What do workflows look like? What challenges (and solutions) have people found for working with authorities in a special collections environment?

4. Announcements