



Minutes
Bibliographic Standards Committee
ALA Annual Conference 2017
Saturday, June 24, 2017, 8:30-11:30 am
Renaissance Blackstone Chicago – Crystal Ballroom
Chicago, IL

1. Introduction of members and visitors
 2. Settlement of the agenda
 3. Approval of Midwinter 2017 minutes
 4. Updates from BSC Chair
 5. DCRM(M): Descriptive Cataloging of Rare Materials (Music) (Lorimer)
 6. DCRM(S): Descriptive Cataloging of Rare Materials (Serials) (Gillis)
 7. DCRM(MSS): Descriptive Cataloging of Rare Materials (Manuscripts) (Nichols)
 8. Controlled Vocabularies Editorial Group (Brown/Hildebrand)
 9. BSC-sponsored RBMS Conference programs
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 2. Seminar: Using DCRM for modern material – Sotelo/O’Dell
 - b. (2018) – New Orleans, LA
 1. Workshop: Cataloging Rare Materials Using RDF – Kovari
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Appendix C: RBMS 2018 seminar proposal: RBMS Policy Statements

1. Introduction of members and visitors

Members present: Nina Schneider, Clark Library, UCLA (Chair); Amy Brown, Boston College (ex-officio: Controlled Vocabularies editor); Valerie Buck, Brigham Young University (Secretary); Ellen Cordes, Lewis Walpole Library, Yale; Emily Epstein, University of Colorado, Health Sciences Library; Matthew Haugen, Columbia University; Linda Isaac, University of Miami; Jason Kovari, Cornell University; Francis Lapka, Yale Center for British Art (ex-officio: DCRM Task Force chair); Kate Moriarty, Saint Louis University; Margaret Nichols, Cornell University; Amy Tims, American Antiquarian Society (CC:DA liaison).

Visitors: Brenna Bychowski, American Antiquarian Society; Kalan Davis, University of Minnesota; Lori Dekydtspotter, Lilly Library, Indiana University; Matthew Ducmanas, Temple University; Todd Fell, Yale University; Jane Gillis, Yale University; Elizabeth Hobart, Penn State; Kate James, Library of Congress; James Larrabee, UC Berkeley Law Library;

Martha Lawler, LSU Shreveport; Deborah J. Leslie, Folger Shakespeare Library; Michelle Mascaro, University of California San Diego; Jennifer Nelson, Robbins Collection, UC Berkeley; Iris O'Brien, The British Library; Elizabeth O'Keefe, Morgan Library & Museum, retired; Audrey Pearson, Beinecke Library, Yale; Brian Stearns, University of Alberta; Gioia Stevens, New York University; Susan Sundquist, Getty Research Institute; Elizabeth Wilkinson, University of Virginia.

Members absent: Marcia Barrett, University of California Santa Cruz; Allison O'Dell, University of Florida; Leslie Waggener, University of Wyoming.

2. Settlement of the agenda

Nina Schneider added a report from Linda Isaac on the Experts Directory to Item 4.

3. Approval of Midwinter 2017 minutes

The minutes for Midwinter 2017 were approved pending minor corrections.

4. Updates from BSC Chair

Inactive wiki migration/archives deposits

At Midwinter 2017 Schneider asked people to send her information about inactive BSC committee or task force wikis. These need to be archived because PBWorks will eventually delete inactive wikis. Schneider read the current list of wikis that will be archived:

- DCRM (Cartographic)
- DCRM (Graphics)
- DCRM (Graphics) "close reading"
- DCRM (Graphics) "examples"
- DCRM(MSS)¹

Schneider asked that people send her links for any other wikis that can be archived. Wikis that will definitely remain active for now are:

- DCRM Editorial Guidelines errata
- DCRM Steering Group
- RBMS BSC Manual

Standard Citation Forms editorial team report

Marcia Barrett asked Schneider to give this report. The editorial team created 77 new citation forms since Midwinter. These new forms were posted monthly on the DCRM-L listserv. The site averaged about 1,198 sessions and 561 users per month. A new spreadsheet has been added to the web site for institutions to use to perform global system updates for citation forms in their bibliographic records.

¹ Margaret Nichols added this to the list.

There have been some technical difficulties with searches involving diacritics. A search for words with diacritics in which the diacritics are omitted will result in zero hits. See the full report in Appendix A.

Web Resources Directory volunteer

Schneider announced that there is still a need for a volunteer to gather new web resources for rare materials for inclusion in each round of the BSC minutes. Anyone interested should contact Schneider. The URL for this directory is <http://lib.nmsu.edu/rarecat/>.

Directory of Experts status

Linda Isaac reported. Volunteers in BSC are creating a directory of rare materials experts, similar to what can be seen in the ABAA directory. The directory's purpose is to help others with rare materials needs. The web team has been a huge help; they now recommend moving ahead and making the link to the online form available on the RBMS web site under Cataloging Aids. All RBMS members should go on and add their information. The format looks similar to the SCF proposal template, so it isn't difficult. The directory is open to all librarian types to submit their information. Neither BSC nor RBMS will be mediating transactions arising from the directory; it is up to individuals to make contact and negotiate their own situation. Email Linda with any questions or concerns. Deborah Leslie reminded everyone that the DCRM-L listserv is still the primary forum for helping with questions and discussions in the rare materials community.

5. DCRM(M): Descriptive Cataloging of Rare Materials (Music) (Schneider for Lorimer)

Schneider reported for Nancy Lorimer: Manon Th  roux, who recently moved to the Library of Congress, has offered to review the BIBCO Standard Record for music. It is a good time to update it now that DCRM(M) is finished.

6. DCRM(S): Descriptive Cataloging of Rare Materials (Serials) (Gillis)

Jane Gillis, Annie Copeland, and Stephen Skuce have been working on examples for DCRM(S). All the examples have references in the current form. All but six examples have been scanned into the Beinecke Digital Library. There will be a lot more images for these than there were for books. Gillis, Copeland, and Skuce have not yet resolved how best to get the examples out to BSC for review. The easiest method may be allowing access to the drop box.

Schneider asked whether there may be a copyright issue with any images when it comes time to allow access. Gillis was unsure, although at the time the images were made there seemed to be no problem.

The URL for the Beinecke Digital Library is <http://brbl-dl.library.yale.edu/vufind/>, where one can search by serial title to find the examples.

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

Margaret Nichols reported that one unresolved issue for DCRM(MSS) from Midwinter was that the code for 040 subfield “e” wouldn’t yet validate. However, it is now resolved, so it can be used in the bibliographic record.

Two other issues are now pending involving Cataloger’s Desktop and the BIBCO Standard Record. Alison Bridger volunteered to work on the BIBCO Standard Record for manuscripts. There isn’t any new information about getting DCRM(MSS) into Cataloger’s Desktop at this time.

Kate James responded that the next update for Cataloger’s Desktop is August 2017, so DCRM(MSS) may appear then.

[Nichols next reported on the DCRM(MSS) Workshop conducted at the 2017 RBMS Conference held earlier this week. This information appears in Item 9 below.]

8. Controlled Vocabularies Editorial Group (Brown/Hildebrand)

Amy Brown reported that the Controlled Vocabularies Editorial Group (CV) has a big project proposed for the upcoming year. In order to remain relevant in meeting current rare materials cataloging needs with current technology, CV will, in essence, create a new resource that focuses on special collections and rare materials, and thus doesn’t duplicate the work that other thesauri such as AAT and LC have already done. Also, the current CV vocabulary includes illogical and outdated terms that need revision, which creating a new resource can resolve. What this entails is reviewing all existing terms for relevancy, warrant, and usage. This means some terms will be deprecated, but all such terms will be submitted to BSC for review before exclusion. While this review is taking place, there will have to be a moratorium on the submission of new terms.

Schneider noted that this is a major shift from the past direction of CV. Brown explained that with integration, CV was going to be an entire new resource with a new hierarchical structure anyway. So now is the moment to scrutinize and reshape the tool, developing the infrastructure around linked data.

Discussion ensued about how far to rely on other thesauri in an effort to avoid duplication. Francis Lapka suggested that CV can establish a workflow for easy submission of new terms to LC. Deborah Leslie pointed out that AAT still accepts proposals for new terms. Brown agreed, but maintained that there is still a need for RBMS-specific terms that CV scopes in our domain. She also reminded everyone that any institution is free to choose their terms from any thesaurus, including deprecated terms. But for CV, with current technology needs, the implementation of this new direction is the only viable path right now. The timeline for implementation may be a year, or more.

9. BSC-sponsored RBMS Conference programs

(2017) – Iowa City, IA

1. Workshop: DCRM(MSS) – Nichols
[This report was given immediately following Item 7.]
Nichols reported that 30 people attended (with a waitlist of 35) to learn how to use the recently published DCRM(MSS) to catalog manuscripts. Feedback has been very positive. Nichols has received multiple requests to do the workshop at different locations across the nation.
2. Seminar: Cataloging Today's Rare Materials – Sotelo/O'Dell
Elizabeth Hobart reported. Presenters discussed various formats, including gaming, zines, comic books, digitized materials, web archiving, etc. Linda Isaac moderated. About 90 people attended. Feedback has been very positive.

(2018) – New Orleans, LA

1. Proposed Workshop: Cataloging Rare Materials using RDF – Kovari
Jason Kovari reported that the purpose of this workshop will be to engage with catalogers in doing data modeling exercises. The bulk of the workshop will be using the ontology extension while cataloging. The intent is to experiment and gather data; the hope is that this will allow a deeper understanding to inform future development.

Discussion ensued about the experimental nature of the workshop. Leslie proposed dropping "Cataloging" from the title to better express the nature of the workshop, and others agreed.

Elizabeth Wilkinson notified Kovari that the Workshops Committee had not yet received this proposal. Schneider promised to resend the proposal today.

See Appendix B for a copy of this proposal.

2. Proposed Seminar: RBMS Policy Statements – Lapka
Lapka reported that this workshop will cover the new RBMS Policy Statements in RDA. It will explain the background of the work and the timeline, and outline the major differences between the Policy Statements, the DCRM manuals, and RDA. Deborah Leslie, Michelle Mascaro, and Audrey Pearson will be presenters, and Lapka will be the moderator.

Lapka also proposed to follow up the 2018 seminar with a future workshop.

Amy Tims asked whether the possibility of the 3R Project (RDA Toolkit Restructure and Redesign) not being completed by April 2018 would negatively impact the 2018

seminar. Lapka replied that there shouldn't be a serious impact. Audrey Pearson added that she will have a mock-up of the Toolkit ready if necessary.

See Appendix C for a copy of this proposal.

10. CC:DA Report (Tims)

Amy Tims reported that most CC:DA work is frozen at the moment for the 3R Project. Most of the activity is being done by RDA Working Groups. She invited all interested persons to the CC:DA meeting later today and announced that the Monday meeting has been cancelled.

11. DCRM Task Force (Lapka)

Francis Lapka announced that several ALA meetings about RDA are still to come this weekend, including one replacing the cancelled CC:DA meeting on Monday that will explore what various communities need in terms of data elements to add to RDA.

Lapka is also chair of the Rare Materials Working Group (RMWG) under the RDA Steering Committee (RSC), so before reporting on DCRM Task Force (TF) work, Lapka addressed RMWG activities.

For the RMWG, Lapka reported that RDA is in the midst of the 3R Project, and intense meetings are being held twice a year for representatives of the working groups, regional representatives, and the RSC. Discussions about needed changes are ongoing, with the target date of April 2018 for changes to go live in the Toolkit. Lapka continues to follow up on issues of interest to BSC and the TF.

The intent of the 3R project is to facilitate full alignment between RDA and the Library Reference Model. Among other things, this means that RDA will incorporate new entities for Place and Time Spans. The 3R Project is also creating a new structure in response to user feedback. This new structure will impact RBMS Policy Statements work because the Policy Statements are arranged according to the current structure.

ALA Annual 2017 is the last in which the TF will exist. The TF has meetings today and tomorrow to determine how the work will move forward. Starting July 1st, the Policy Statements will be administered by BSC. To keep the Policy Statements up-to-date, this means that the work will never really have an ending, so it may be best for BSC to create a maintenance team like with Controlled Vocabularies. As this team takes shape, Michelle Mascaro has agreed to take over leadership.

The next step for the Policy Statements is to ask for review and comments from the community, foremost from BSC. The method of review will be discussed later today. The challenge is that the 3R Project is happening at the same time. This won't necessarily impact the method of current cataloging in RDA, just the presentation of the guidelines will change. However, wording of some RDA instructions *will* change, so unfortunately some of the Policy Statements will have to change as those come out. Lapka emphasized that, for

now, feedback should be about outcomes of the Policy Statements in cataloging, not about structure or wordsmithing.

Lapka stated that the TF has done a lot of work. He acknowledged all TF members by name as well as Ellen Cordes, all who have made significant contributions.

12. LD4P Project and BSC (Kovari)

Jason Kovari explained the background of the project. Upon the LD4P Project's receipt of a Mellon grant, the Rare Materials Ontology Extension group (RMOE), in collaboration with BSC, began building an ontology extension for the description of rare materials. The intention is to provide "a model for handling the complexity of rare materials, particularly item-level description not addressed in BIBFRAME."²

Kovari emphasized that this work is not creating anything that is to be implemented. It is investigating a potential set of properties and classes and extension to BIBFRAME. Current work has focused on research and modeling. Other ontology extensions are under way in the LD4P Project, one of which is ArtFrame. ArtFrame and RMOE discovered areas of overlap and so decided to join efforts in these areas. They have focused on the areas of bibliographic citations, physical condition, extension requirements, accession numbers, physical characteristics, etc. Recommendation documents are being written out and will soon be made accessible on GitHub for comment and discussion. Ontology files will be available at some point, as well. Additionally, the ontologies will be loaded into an editor to allow for creating descriptions. Finally, a model that can be tested will be provided, probably in "Vitrolib." This will be done in the next six months because April 2018 is the endpoint for the group. Then next steps can be addressed by BSC.

Kovari brought two questions to BSC. First was whether the activity Kovari has reported on is answering BSC's expectations on this issue. Second was what path can BSC identify for moving into experimentation in early 2018 (What type of training materials? Who should be involved? How widespread should the experimentation be?).

Schneider explained that the relationship between BSC and LD4P began when BSC started investigating the linked data issue at about the same time LD4P began. After the deadend of a separate BSC attempt to address the issue, the LD4P project became an avenue for BSC to be involved. Kovari added that the relationship is very beneficial because the LD4P Project allows a direct line of communication to BIBFRAME architects for asking questions such as Will such-and-such work with the BIBFRAME set up?, or, What if we tried this?

Lapka asked Kovari to share updates and other aspects of the work on the DCRM-L listserv for comment and discussion. Kovari agreed that there will be more transparency in the future. He also explained that their work does not assume that those who will become involved will have to be hosting BIBFRAME locally.

² See Rare Materials Ontology Extension
<https://wiki.duraspace.org/display/LD4P/Rare+Materials+Ontology+Extension>.

Asked about what may evolve after the April 2018 endpoint, Kovari stated that for him to comment any further on the future of LD4P would be speculation. For now, he asked for five volunteers to be involved in experimenting, including any who currently know nothing about this process. Schneider recommended getting volunteers who are experts in different formats, such as music, cartographic, and bibliographic.

Kovari acknowledged the hard work of the group, several members of which were present.

13. Announcements from the floor

Todd Fell announced that the Beinecke Library will soon be posting an entry-level cataloging position.

Leslie announced the July 15th deadline for applications for the Nadia Sophie Seiler Rare Materials Residency at the Folger Shakespeare Library. It is for nine months, for recent library school graduates (within the last 18 months). The work will be primarily on cataloging projects, also working with curators. More information can be found at [http://folgerpedia.folger.edu/Nadia Sophie Seiler Rare Materials Residency](http://folgerpedia.folger.edu/Nadia_Sophie_Seiler_Rare_Materials_Residency) .

14. Acknowledgements

Schneider again acknowledged all the work of the DCRM Task Force, and read the names of TF members.

Schneider acknowledged outgoing members of BSC: Marcia Barrett, Valerie Buck, Emily Epstein, Matthew Haugen, Margaret Nichols, Amy Tims, and Leslie Waggener.

Schneider, who is also rotating off the committee, announced that Francis Lapka is the incoming chair of BSC.

Lapka acknowledged and thanked Schneider for her work as BSC chair, noting that among many accomplishments, several of the DCRM manuals were reviewed and finished during her tenure, as well as the formation of the DCRM Task Force. Schneider then passed Lapka the official BSC gavel.

15. Adjournment

Lapka adjourned the meeting at 11:15 a.m.

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

Appendix A

Standard Citation Forms Report for BSC Annual 2017

The SCF Editorial Team has created 77 new citation forms based on submitted proposals. All have added to the [Standard Citation Forms database](#). New terms are announced on DCRM-L monthly at the end of the month.

The site averaged 1198 sessions and 561 users per month.

A spreadsheet of old and corresponding new citation forms is available on the SCF website for those interested in updating old citation forms.

We are currently experiencing search issues for forms with diacritics. Diacritics are displaying fine, and if you search with diacritics, you'll retrieve the expected results. For example, a search for "Recopilación" gets you to "Recopilación de leyes, decretos, bandos, reglamentos, circulares y providencias de los supremos poderes y otras autoridades de la República Mexicana." Omitting diacritics from a search will not yield the expected results. In other words, a title search for "Recopilacion" pulls up nothing.

The problem is related to issues with the RBMS website as a whole, and occasionally, SCF search and display have been affected. Ann Myers has been working with Kelli Hansen to resolve this. As a temporary solution, Kelli has changed the title field to search all fields, which will yield the desired citation (and possibly other results).

We are also working on streamlining our workflow.

Appendix B

Title: Cataloging Rare Materials using RDF : data modeling, linked data & the Rare Materials Ontology Extension

Summary (150-250 words):

Linked data is becoming increasingly important for scholarship and research, not just for catalogers, but for public service and user-experience librarians too. In this workshop, members of the Rare Materials Ontology group will provide a hands-on opportunity to experiment with the Rare Materials Ontology Extension, which has been developed collaboratively between the Bibliographic Standards Committee and the Andrew W. Mellon funded Linked Data for Production. The Rare Materials Ontology Extension extends BIBFRAME and other ontologies to allow for the description of rare materials, an area of descriptive practice completely overlooked in the BIBFRAME 2.0 ontology.

To enable this experimentation, the workshop leaders will provide an overview of data modeling and linked data; this overview and corresponding exercise(s) are intended to ground participants in the principles and models underlying the Rare Materials Ontology Extension. After providing this overview, we will detail modeling principles in the Rare Materials Ontology Extension and facilitate a hands-on cataloging exercise.

While linked data is not currently implemented as a production framework for cataloging at any U.S. institution, the community is making strides to prepare for this implementation. We hope that this workshop will allow participants to more actively engage in discussions as institutions consider what a potential shift to linked data would entail.

Leaders:

- Jason Kovari (Cornell University)
- Additional presenters from the RareMat group who are also RBMS members (TBD)

Timeline: 09:00 – 09:30 : Arrival and Introductions

09:30 – 11:00 : Data modeling, linked data and RDF: background and essentials

11:00 – 12:00 : Data modeling exercise

12:00 – 13:00 : Lunch

13:00 – 13:30 : The Rare Materials Ontology Extension (RareMat) model : overview

13:30 – 16:00 : Hands-on cataloging exercise using RareMat (using an editor)

16:00 – 16:30 : Feedback on RareMat model and editor

16:30 – 17:00 : What's next? Requirements and advocacy for implementation

Learning Outcomes :

- Workshop leaders hope to dispel concern and confusion over the linked data rhetoric
- Participants will gain further understanding of linked data principles, including but not limited to classes and property types; while RDF essentials are often outlined for library audiences, we will dive deeper and address any confusion over terminology. Leads will provide background

readings prior to the workshop to ensure that all participants enter with fundamental knowledge.

- Through a data modeling exercise, we will ensure a deeper understanding of the considerations that go into building a data model (and ontology).
- Through the cataloging exercise, participants will create sample data that can be assessed through SPARQL queries or other means.
- Through this workshop, participants will gain a deeper understanding of the Rare Materials Ontology Extension model and opportunities that linked data affords the rare community.

Equipment: projector with HDMI OR mini DisplayPort connection; whiteboard(s) OR large flipcharts; moveable chairs; Internet access for all participants (or cannot conduct exercise).

Participants will need to bring their own laptops for the cataloging exercise; the tool will be browser based and will have minimal requirements

Submitted by the RBMS Bibliographic Standards Committee

June 9, 2017

Appendix C

RBMS Policy Statements, seminar proposal (2018, New Orleans)

The Descriptive Cataloging of Rare Materials (DCRM) suite of manuals have a new successor: the RBMS Policy Statements are an RDA-compliant consolidated set of guidelines for cataloging rare materials. The RBMS Policy Statements will be published in 2018, and this seminar will be an opportunity for members of the Descriptive Cataloging of Rare Materials Task Force to introduce the RBMS community to this new standard. Catalogers and non-catalogers alike will benefit from learning about the RBMS Policy Statements and how they will affect display and searching of bibliographic data. Audience members will have ample time to ask questions of several members of the task force.

Three speakers from the DCRM Task Force will present for 20 minutes each on the following topics:

1. Background: History of rare materials cataloging standards; how the RBMS Policy Statements fit with RDA, RDA's exceptions for Early Printed Resources, the BIBCO Standard Record, and the RDA Steering Committee's Rare Materials Working Group.
2. What is different?: What are the major changes from DCRM to RBMS PS? We will highlight where the rules have changed, and how this will affect catalog data.
3. RBMS Toolkit demonstration: This will be a technical explanation of how the Policy Statements function within the RDA Toolkit content. The presentation will also include our current vision for ongoing development of the Policy Statements and related resources.

Francis Lapka, chair of the DCRM Task Force, will act as moderator and will give a brief introduction.

Required technology: Powerpoint, computer, projector, screen

Seminar presenters:

- Deborah J. Leslie, Senior Cataloger, Folger Shakespeare Library
- Michelle Mascaro, Head, Special Collections Metadata, University of California, San Diego
- Audrey Pearson, Catalog/Metadata Librarian, Beinecke Rare Book and Manuscript Library, Yale University

Moderator: Francis Lapka, Catalog Librarian, Yale Center for British Art