Minutes (Draft)
Bibliographic Standards Committee
Virtual Meeting
Zoom, Monday, February 3, 2020
2:00 - 3:30 pm EST

Agenda

1. Welcome and announcements
2. Review of draft BSC minutes, November 18, 2019, virtual meeting
3. Standard Citation Forms Linked Data Working Group: report
4. Program Planning Group: report
Appendix A: BSC Minutes 2019-08-28
Appendix B: BSC Minutes 2019-11-18

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

Visitors: Abigail Connick, Smith College; Ellen Cordes, Lewis Walpole Library; Zoe Dobbs, Beinecke Library, Yale University; Emily Epstein, University of Colorado Strauss Health Sciences Library; Rebecca Giguere, American Antiquarian Society; Matt Haugen, Columbia University Libraries; Sarah Hoover, University of North Carolina-Chapel Hill; Amy Jordan, American Antiquarian Society; Maggie Long, Wesleyan University; Jennifer MacDonald, University of Delaware Library; Danijela Matković, Beinecke Library, Yale University; Martha McTear, University of California Santa Barbara; Ann Myers, Stanford University; Maria Oldal, Morgan Library & Museum; Audrey Pearson, Beinecke Library, Yale University; Manon Théroux, Library of Congress (Library of Congress liaison); Amy Tims, American Antiquarian Society.

Members absent: Deborah J. Leslie, Folger Shakespeare Library; Lauren Reno, Duke University Libraries (Controlled Vocabularies Editorial Group co-editor); Brian Stearns, University of Alberta.

1. Welcome and announcements

The chair welcomed attendees and asked for a volunteer to monitor chat participation. Jason Kovari volunteered. The RBMS RDA Editorial Group had productive meetings at ALA Midwinter, and we can expect to hear more soon on their progress. The chair pointed out that this is the time of year to
volunteer for the committee, and reminded those members in the second year of their first term that they will need to complete the ACRL volunteer form to renew for a second term. Others are also welcome to apply for membership via the volunteer form.

The chair expects we will have two more meetings before the ALA Annual conference. He thanked Jessica Grzegorski and Kate Moriarty for their work in updating the Bibliographic Standards Committee’s (BSC) Working Papers, Reports & Discussion Topics page to incorporate documents from BSC virtual meetings. Previously, the documents were housed only on a shared committee Google drive.

The chair also announced that the RBMS Executive Committee voted to approve Examples to accompany Descriptive Cataloging of Rare Materials (Serials). He thanked the editorial team for their work and noted that the community will be informed when access is made to the resource. The chair announced that BSC voted to approve revisions of OCLC's Merging duplicate books records: A field-by-field comparison, and congratulated the revision group. The next steps fall to OCLC. The revision group will next turn its attention to Merging duplicate continuing resource records: A field-by-field comparison.

2. Review of draft BSC minutes, November 18, 2019, virtual meeting

The secretary described a clarification made in the AMREMM-DCRM(MSS) Review Group section of the first draft of the 2019 November 18 virtual meeting draft minutes. There were no other comments. The chair will open a poll to vote on the second draft via ALA Connect. [N.B. The draft minutes were approved (yes: 21, no: 0) via an ALA Connect poll February 5-13, 2020.]

3. Standard Citation Forms Linked Data Working Group: report

Standard Citation Forms Linked Data Working Group (SCF LD WG) co-chairs Amy Brown and Brittney Washington summarized and led a discussion of the Standard Citation Forms Linked Data Working Group report on evaluating the role of the Standard Citation Forms (SCF) resource in a linked-data environment. Taking into account the current metadata and linked-data environment as well as RBMS capacity, the group submitted three recommendations: 1) add persistent, dereferenceable URIs from id.loc.gov to SCF records; 2) expand the scope and working principles of SCF to include the addition of id.loc.gov URIs; 3) reconvene the SCF LD WG as linked data developments transpire.

Extensive discussion revealed an acknowledgement of the constantly changing linked-data landscape and that SCF linked-data functionality will be an iterative process for the foreseeable future. A suggestion was made to monitor OCLC's recently announced Entity Management Infrastructure project. In general, there was support and appreciation for the SCF LD WG recommendations. The next step is for the Standard Citation Forms editorial group to meet to discuss the SCF LD WG recommendations, possibly followed by a meeting between the two groups. The BSC chair thanked the members of SCF LD WG (Amy Brown, Brittney Washington, Liz Adams, Valerie Buck, Jason Kovari, Brian Stearns) and will be in touch with the co-chairs regarding whether they consider their charge fulfilled or wish to tackle additional issues.

4. Program Planning Group: report
Brenna Bychowski facilitated a discussion of the Program Planning Group report. The BSC Program Planning Group (PPG) is in its second year of coordinating technical-services-related program proposals for RBMS conferences.

**RBMS 2020 Submissions**

Five proposals were submitted for the 2020 RBMS conference, three of which were accepted. The “Cataloging Artists’ Books” workshop, “LD4P2 and Rare Materials” seminar, and the “Mitigating Pejorative Terminology in Descriptive Standards” paper/panel were accepted. The “Culturally Competent Catalog Description” paper/panel was not accepted and may be resubmitted another year. The “My Favorite Mistake: Technical Services Edition” participant-driven session was not accepted, possibly due to the hybrid nature of its format. It has been resubmitted for the People’s Choice category.

One of the factors affecting acceptance was the sheer number of proposals this year. The chair of the Seminars Committee also encourages more technical services librarians to join conference programming committees.

**Potential Topics for RBMS 2021**

See the Program Planning Group report for the full list and details of potential topics. The theme for RBMS 2021 is “Working with Change: Labour, Leadership, and Legacy.”

**Newly suggested topics**

1. “A Little Goes a Long Way:” There were questions regarding the content and format (e.g. one presenter discussing several tools or several lightning talks on one tool?) as well as appreciation for the usefulness of hearing what others are achieving with tools.
2. RDA, DCRM and bookseller cataloging: Suggestions included a discussion session between catalogers and vendors, and addressing the utility of standards and systems that would promote easy reuse of vendor data in rare material cataloging.
3. Local practice documentation: There was widespread support for this topic. In addition to the issues raised in the topic’s description, there were suggestions to address the use of documentation in data consistency, in advocating for the need for rare materials catalogers (due to the complexities in shared and local-practice standards), in making things better for the next cataloger, and in preparing for a linked-data future. It was observed that the topic fits the conference theme of change, labour, leadership, and legacy.
4. DCRM2 seminar: There was universal support for this topic.
5. General description of individual illustrations in manuscripts: A suggestion touched on cataloger workload and possibly recruiting subject specialists (faculty, graduate students) to provide illustration descriptions to the cataloger.

**Approved but not submitted topics from last year**

1. Managing in technical services (seminar): We lacked a volunteer to write the proposal last year but there is interest in pursuing it as a submission this year.
2. Topics of conversation between catalogers and non-catalogers (participant-driven session): The proposal has been written but was not submitted last year because of the guideline to limit participants to one proposal. There continues to be interest in the proposal and agreement to include it in this year’s submissions.

*Topics discussed last year, but not approved to be proposals*

Three past topics - backlogs, outsourcing, and retrospective conversion - would all fit into next year’s conference theme. There was a suggestion to repackage them to address working with vendors on meeting the needs of special collections material.

*Format-Specific Workshops*

In following up on last year’s suggestion to sponsor a rotating selection of workshops on cataloging special formats, three workshops were suggested

1. *Examples to accompany Descriptive Cataloging of Rare Materials (Serials)*
2. Cataloging comic books
3. Cataloging objects (prompted by OLAC's recent publication of [Best Practices for Cataloging Objects Using RDA and MARC21](#))

There was also a suggestion to include a question on the survey to solicit additional formats of interest.

PPG will synthesize today’s discussion and send a survey to BSC on level of interest in the topics considered. The group will then formulate its official suggestions for a BSC vote, after which group members will work with proposers in drafting and submitting their proposals.

The BSC chair thanked PPG for their work and for a promising slate of topics for 2021. Attendees were also reminded to vote in the upcoming People’s Choice poll for the 2020 RBMS conference.

The meeting closed at 3:30 p.m.

Respectfully submitted February 13, 2020 by Kate Moriarty, RBMS Bibliographic Standards Committee secretary.
Appendix A: BSC Minutes 2019-08-28

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

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

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

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

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

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

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

1. Approval of BSC meeting minutes, ALA Annual 2019

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

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

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

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

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

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

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

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

MARC 245

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

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

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

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

3. Experts Directory (Liz Adams)

The following report was submitted for discussion at this meeting: https://drive.google.com/file/d/1w8yYJzEFopF5k3Le1PGd0XtZG4KmmV4h/view. However, due to time constraints, discussion was postponed until the next meeting.
The chair extended the length of the meeting by 15 minutes for those who could stay. The meeting closed at 4:15 pm EDT.

Respectfully submitted September 13, 2019 by Kate Moriarty, RBMS Bibliographic Standards Committee secretary.
Appendix B: BSC Minutes 2019-11-18

Minutes
Bibliographic Standards Committee
Virtual Meeting
Zoom, Monday, November 18, 2019
2:00 - 3:30 pm EST

1. Housekeeping and acknowledgments (Francis Lapka)
2. Review of BSC minutes, August 28, 2019, virtual meeting
3. Experts Directory (Liz Adams)
4. AMREMM/DCRM(MSS) Review Group, Final Report (Jennifer MacDonald)

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

Visitors: Erin Blake, Folger Shakespeare Library; Diane Dias De Fazio, University of Iowa Libraries; Matthew Haugen, Columbia University; Ryan Hildebrand, University of Oregon; Anna Loewenthal, Loyola Notre Dame Library; Jennifer MacDonald, University of Delaware; Danijela Matković, Beinecke Library, Yale University; Ann Myers, Stanford University; Margaret Nichols, Cornell University; Euem Osmera, University of Nebraska Medical Center, McGoogan Library of Medicine; Felicia Piscitelli, Texas A & M University; Sara Schliep, Folger Shakespeare Library; Manon Théroux, Library of Congress (Library of Congress liaison); Amy Tims, American Antiquarian Society; Laura Wilsey, Stanford University.

Members absent: Valerie Buck, Brigham Young University; Rafael Linares, La Casa del Libro.

1. Housekeeping and Acknowledgments (Francis Lapka)

The chair acknowledged two recent milestones. He thanked Annie Copeland, Jane Gillis, Randy Brandt, and Stephen Skuce for completing the writing of Examples to Accompany Descriptive Cataloging of Rare Materials (Serials). The work was approved by the Bibliographic Standards Committee (BSC) earlier this month and now awaits review by the RBMS Executive Committee, after which it will be posted as a PDF to rbms.info and entered as a resource into Cataloger’s Desktop. The chair also
congratulated Matt Ducmanas, Katelyn Borbely, Brittney Washington, and Larry Creider for their work in updating and enhancing Web Resources for the Rare Materials Cataloger and completing its move earlier this month to rbms.info.

2. Review of BSC minutes, August 28, 2019, virtual meeting

There were no comments on the August 28, 2019 draft minutes. The chair will open a poll to vote on them via ALA Connect. [N.B. The draft minutes were approved via an ALA Connect poll November 21-December 4, 2019.]

The chair reminded the meeting of the need for a BSC secretary come July 2020. The required term length has been changed to one year with two or three years being preferable. The chair also clarified that the secretary role fulfills the requirement that all BSC members be involved in a specific BSC activity. Anyone interested can contact the chair or the current secretary. [N.B. Since the meeting, the chair appointed volunteer Danijela Matković.]

3. Experts Directory (Liz Adams)

The Experts Directory evolved out of discussion at the 2016 RBMS Conference seminar, Succession Planning for Rare Materials Cataloging, as a vehicle for deeper or more extensive guidance from self-identified technical services experts than that available via the DCRM-L electronic list.

The editor started by thanking the previous editor, Linda Isaac, and the Web Team liaison, Kelli Hanson, for their leadership in getting the Directory to its current state. She then led a discussion of the resource based on her report.

The short-term goal is to work with the Web Team on several design elements, specifically customization of the display, such as developing a child template; search functionality (also of interest to the editors of Web Resources for the Rare Materials Cataloger); and ordering the entries alphabetically. Additional suggestions from meeting attendees included adding a field to the Contact Information form for a link to the expert’s web page (when applicable); including editor contact information for communicating updates to an expert’s Contact Information entry; and changing the label of the Browse tab to reflect that the browse is by area of expertise. It was decided that the Directory would be open to experts outside the U.S., so a field for country will be added to the Contact Information form.

After a brief discussion on the scope of the resource, it was decided that, for now, we will limit the areas of expertise to technical services rather than open it up to all special collections services. There was also a discussion on what we mean by “expert.” This remains an open question and requires a balance between avoiding a too-formidable definition of expert and one that is meaningful enough that it ensures that questions/discussions that could be addressed on DCRM-L do not move to this resource.

4. AMREMM/DCRM(MSS) Review Group, Final Report (Jennifer MacDonald)
In their Final Report, the AMREMM/DCRM(MSS) Review Group recommends combining Descriptive Cataloging of Ancient, Medieval, Renaissance, and Early Modern Manuscripts (AMREMM) and Descriptive Cataloging of Rare Materials (Manuscripts) (DCRM(MSS)) into one standard. The group also recommends aligning the new standard with the IFLA Library Reference Model (LRM) and Resource Description and Access (RDA), and continuing its alignment with DCRM, currently under revision. This may prove challenging, however, in a consolidated DCRM manual. As the combined AMREMM/DCRM(MSS) manual may require sections with a parallel structure to accommodate the instances in which AMREMM and DCRM(MSS) differ, incorporating these new guidelines into a combined DCRM manual may add complexity. A concern was also raised regarding the potential of losing DCRM(MSS)’s archival focus if the new manuscripts standard were combined with other DCRM manuals. A decision on the logistics of incorporating manuscripts into the revised DCRM guidelines (whether as part of a consolidated or a separate manual) will be deferred until after the release of the first iteration of the DCRM RDA guidelines for books.

The “User Needs for Single Item Manuscript Catalog Records” survey administered by the Review Group in June and July of 2019 yielded a wealth of information from both information users and information managers. As the data will be useful both in developing the new standard and in future research on the data needs of single-item manuscript users, the Review Group recommends making it freely available. [N.B. Following the meeting, all documents submitted by the Review Group were posted to the BSC Meeting Documents page.]

Results of the survey indicate that many patron needs would be met by integrating AMREMM and DCRM(MSS). Areas needing more attention include refining the guidelines on devised vs. transcribed titles and adding guidelines on genre and form access points.

Regarding meeting the needs of information managers, the Review Group recommends making the new standard freely available - without the need for a subscription to the RDA Toolkit; coordinating with the RBMS RDA Editorial Group to retain the manuscript guidelines in DCRM(Cartographic), DCRM(Graphics), DCRM(Music), and DCRM(Serials); and that it may be desirable to include, with the input of specialists, guidelines on describing non-Western manuscripts. The survey also revealed heavy use of the RBMS Controlled Vocabularies and the utility of adding manuscript-specific terms to the Vocabularies, to which the Controlled Vocabularies editors agreed.

The BSC chair declared that the Review Group has fulfilled its charge and thanked the members for their work. [N.B. The AMREMM/DCRM(MSS) Review Group Final Report was approved via an ALA Connect poll November 21-December 4, 2019.]

The meeting closed at 3:30 p.m.

Respectfully submitted January 9, 2020 by Kate Moriarty, RBMS Bibliographic Standards Committee secretary.