

**Minutes (Draft)**  
**Bibliographic Standards Committee**  
Virtual Meeting: RBMS Policy Statements  
Zoom, Wednesday, April 4, 2018  
8:00 - 9:00 am PDT



1. Introduction (what are the RBMS PS) and project status
2. Proposed timeline for completion/next steps
3. Discussion item: Relationship of RBMS PS to LC-PCC PS and BIBCO Standard Record (BSR) and CONSER Standard Record (CSR)
4. Summary of DCRM-L discussion questions (Time permitting)

Members present: Francis Lapka, Yale Center for British Art (chair); Amy Brown, Boston College (ex-officio: Controlled Vocabularies editor); Brenna Bychowski, Beinecke Library, Yale University; Ellen Cordes, Lewis Walpole Library, Yale University; Kalan Knudson Davis, University of Minnesota; Elizabeth Hobart, Penn State University; Linda Isaac, Harvard University, Houghton Library; Michelle Mascaro, University of California San Diego; Kate Moriarty, Saint Louis University (secretary); Iris O'Brien, British Library; Amy Tims, American Antiquarian Society (CC:DA liaison).

Visitors: Liz Adams, Duke University; Jeff Barton, Princeton University; Erin Blake, Folger Shakespeare Library; Katelyn Borbely, ProQuest; Whitney Buccicone, University of Washington; Adelaida Caro, National Library of Spain; Adriana Celmare, Princeton University; Deanna Chavez, Library of Virginia; Stephanie Fell, Duke University; Todd Fell, Beinecke Library, Yale University; Alison Greenlee, Wayne State University; Matthew Haugen, Columbia University; Paul Hessling, University of North Carolina-Greensboro; Sarah Hoover, University of North Carolina-Chapel Hill; Anna Loewenthal, Folger Shakespeare Library; Danijela Matkovic, Beinecke Library, Yale University; Kathleen Medicus, Kent State University; Honor Moody, Harvard Library; Maria Oldal, Morgan Library & Museum; Audrey Pearson, Beinecke Library, Yale University; Melissa Robohn; Christopher Smith, Beinecke Library, Yale University; Stephen Young, Beinecke Library, Yale University; Brittney Washington, Folger Shakespeare Library.

Members absent: Jason Kovari, Cornell University; Deborah J. Leslie, Folger Shakespeare Library; Brian Stearns, University of Alberta.

### **1. Introduction (what are the RBMS PS) and project status**

Francis Lapka started the meeting at 8 a.m. and went over a few housekeeping details, including that comments are welcome from all attendees and that the recording from this meeting will be made publicly available. He reviewed a few of the acronyms that will come up in the discussion: RDA = *Resource Description and Access*; DCRM = Descriptive Cataloging of Rare Materials, or, the six AACR2-based manuals published by the RBMS Bibliographic Standards Committee (BSC); RBMS PS = RBMS's policy statements for RDA, currently under development; BSR = BIBCO Standard Record RDA Metadata Application Profile; CSR = CONSER Standard Record RDA Metadata Application Profile.

Lapka thanked those who participated in the recent close reading of *Examples to Accompany Descriptive Cataloging of Rare Materials (Serials)* and announced the upcoming 2018 RBMS Conference seminar, [From DCRM Manuals to RBMS Policy Statements](#), and that another virtual BSC meeting will take place in May. He then introduced RBMS Policy Statements Editor Michelle Mascaro, who led the rest of the meeting.

Mascaro gave the following context and history of the RBMS Policy Statements.

- **Oct. 2012** The DCRM-RDA Task Force issues their final report, recommending the creation of a *DCRM(B)* that is RDA-compatible.
- **Jan. 2013** The DCRM(B) for RDA Revision Group is formed.
- **June 2013** Change of approach: decision to create a consolidated DCRM based on RDA.
- **June 2014** Decision to, instead of creating a standalone DCRM for RDA, create a series of policy statements to RDA, consisting of rules for rare materials cataloging only where deviation from RDA is necessary or where RDA requires elaboration.
- **Fall 2014** The DCRM Task Force (DCRM TF) is formally formed. This is the group that did the bulk of the RBMS PS writing.
- **Nov. 2015** The Joint Steering Committee for Development of RDA (JSC) invites the DCRM TF to their annual meeting in Edinburgh to discuss rare materials. In conjunction with the Edinburgh JSC meeting, DCRM Task Force members co-present at the “RDA & Rare Materials Seminar.”
- **2016** The RDA Steering Committee Rare Materials Working Group, an international group specific to revising RDA proper and evaluating its examples, is formed as a result of the JSC Nov. 2015 Edinburgh meeting. There is overlap between this group and the DCRM TF but members are careful to keep their work separate.
- **2016** The DCRM Task force formally names the guidelines the RBMS Policy Statements (RBMS PS), in alignment with the naming conventions of other RDA policy statements.
- **2017** The RDA Toolkit content is frozen as part of the 3R Design. Unable to finish the RBMS PS until the new RDA is released.
- **June 2017** The DCRM Task Force completes its charge of creating an initial draft of the RBMS PS; final work of shepherding the RBMS PS to publication is absorbed by the RBMS Bibliographic Standards Committee (BSC). Some members of the DCRM TF continue to be involved.
- **Fall 2017** Initial community review begins via a series of questions on DCRM-L.

[N.B. The recording of the meeting was corrupted and will not be available].

## 2. Proposed timeline for completion/next steps

Mascaro had sent two timeline documents in advance of the meeting: Timeline by Date (see Appendix A) and Timeline by Task (see Appendix B). Mascaro reported that the 3R project and the freezing of the RDA Toolkit continue to be a challenge but that we want to move forward as much as possible before the June release of the new Toolkit. The goal is to finish the RBMS PS in two years (June 2017-June 2019), which coincides with the end of Mascaro's appointed editorship.

Broad RBMS PS questions: Discussion of the remaining broad questions has resumed on DCRM-L.

Graphics: Ellen Cordes reported that she and Lapka had directed eight questions to the DCRM(Graphics) editors to resolve outstanding issues. Cordes and Liz O'Keefe recently finished analyzing the responses and uploaded a draft of their recommendations to the shared DCRM-RDA Google Drive folder. Mascaro thanked Cordes and O'Keefe for their work.

Glossary definitions: Valerie Buck had made a first pass at the glossary, comparing definitions between DCRM modules and RDA. Mascaro issued a call for three to four volunteers to form an editorial group that would make the final recommendations on definitions by Annual. Lapka and Mascaro emphasized that volunteers do not have to have been a member of the DCRM TF or be a BSC member. It can be a good opportunity to explore and express interest in the RBMS PS and BSC. Those interested should email Mascaro.

Goals by ALA Annual 2018: Finish the glossary, examples, and a draft plan on how to tackle 3R revisions.

Between ALA Annual 2018 and Midwinter 2019: Immediately following the release of the new Toolkit, any necessary 3R revisions to the RBMS PS will be made and work will begin on the RBMS PS for relationship chapters - the largest outstanding portion of the RBMS PS. Though at the last BSC meeting a preference was expressed to hold a public hearing at an ALA annual meeting, in order to stick with the timeline, the hearing will need to take place at the ALA Midwinter 2019 meeting. Lapka added that there may be a series of virtual public hearing-like meetings to accommodate those who cannot attend Midwinter 2019.

Between ALA Midwinter 2019 and Annual 2019: A close reading of the RBMS PS - similar to that for *Examples to Accompany Descriptive Cataloging of Rare Materials (Serials)* - will take place followed by revision based on feedback and additional public comment as warranted..

### **3. Discussion item: Relationship of RBMS PS to LC-PCC PS and BIBCO Standard Record (BSR) and CONSER Standard Record (CSR)**

The current drafts of the RBMS PS do not assume application of LC-PCC PS. When the same outcome as the LC-PCC PS is desired, the RBMS PS either provide similar instruction or, in situations in which the RBMS PS will always follow the LC-PCC PS (such as with encoding issues), reference the LC-PCC PS. This saves us the work of monitoring LC-PCC PS changes.

The current BSR and CSR include rare-materials cataloging provisions that serve as a cheat sheet for creating hybrid DCRM/RDA records. Lapka and Mascaro started discussion with PCC about whether to maintain rare material cataloging provisions within the BSR and CSR proper once the RBMS PS are complete. At this point, the PCC Standing Committee on Standards would like to keep options open and not make any final decisions until seeing the completed RBMS PS.

Mascaro asked attendees for thoughts on the relationship between the RBMS PS and the BSR and CSR. Once the RBMS PS are published, retaining rare-materials provisions in the BSR/CSR would require the BSC to both maintain the RBMS PS and coordinate any changes to the RBMS PS provisions in the BSR/CSR with the PCC. A concern raised with removing the RBMS PS, is the low publicity regarding RDA's 2016 decision to allow application of instructions for early printed resources to any material that requires more detailed description (see RDA 1.12). Without that knowledge and RBMS PS instructions in the BSR/CSR, a metadata specialist might not apply RBMS PS to 19th-century material that might warrant it. Since the cheat-sheet nature of the BSR/CSR is so helpful, there was a suggestion, in the event that the RBMS PS are removed, to create something similar, possibly a workflow in the RDA Toolkit. To accommodate institutions without access to the Toolkit, we might also consider creating a freely accessible cheat sheet.

Three straw polls were taken via the meeting attendance sheet; both BSC members and visitors participated.

1. Currently the draft of RBMS PS says RBMS PS do not assume additional application of LC-PCC PS as a default. That means you apply LC-PCC PS only when RBMS PS echo or refer to them. Do you agree with that approach?
  - a. Straw poll result: 28 yes; 2 undecided/conflicted; 5 abstentions.
2. Currently the BSR and CSR includes instructions for the treatment of rare materials largely based on DCRM. Going forward, do we continue to include RBMS PS provisions in the BSR and CSR?
  - a. Straw poll result: 9 yes; 10 no; 10 undecided/conflicted; 7 abstentions.
3. Lapka asked for thoughts on rare-materials instruction in the BSR/CSR that are based on LC-PCC PS, not the RBMS PS.
  - a. Straw poll result: There were 17 responses, 18 abstentions. Most of the responses urged consistent guidance (i.e., do not add LC-PCC PS rare-materials instructions to the BSR/CSR) and noted the potential for confusion if there were two sets of guidelines. A few expressed the opinion that it is up to LC and PCC libraries and that, as RDA currently has guidelines on early printed resources, different instructions already exist.

#### **4. Summary of DCRM-L discussion questions (Time permitting)**

We did not have time to discuss this item but a compilation and summary of DCRM-L discussion questions can be accessed at: [RBMS PS Review Google Drive Folder](#). Mascaro will send the link to DCRM-L and encouraged everyone to review the documents and continue engagement on DCRM-L.

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Both she and Lapka reiterated the value of feedback from those who did not serve on the DCRM Task Force.

The meeting closed at 9 a.m.

Respectfully submitted April 19, 2018 by Kate Moriarty, RBMS Bibliographic Standards Committee secretary.

## **BSC 2018-04-04 Virtual Meeting Appendix A**

### **Timeline: RBMS PS Work By Date**

#### Between now and Annual 2018

- Week of March 26 resume discussion questions on DCRM-L with extent
- April 2 Ellen and Liz complete drafts of outstanding Graphics section
- April 4 Hold first RBMS PS virtual meeting
- Mid-April Form small group to draft glossary definitions
- Week May 14 or 21: Hold second RBMS PS virtual meeting
- June 1
  - Wordsmith team (membership TBD) completes review of Graphics sections
- Annual 2018
  - Complete draft of glossary definitions
  - Goal examples finished
  - Draft game plan for tackling 3R revisions (assuming the 3R June 13 reveal is achieved)

*Other ongoing activities: soliciting feedback on remaining review questions*

#### Between Annual 2018 and Midwinter 2019

- Post 3R launch (July 2018)
  - Commence drafting of RBMS PS for relationship chapters
  - Start work on any necessary 3R revisions to the RBMS PS
  - September 2018 RBMS PS for relationship chapters complete (tent.)
- Post RSC meeting (October 2018?) Flesh out completion timeline for RBMS PS based on RDA publishing schedule
- Thanksgiving 2018 RBMS PS fully revised according to 3R (tent.)
- December 2018 Release draft PS for public comment/closing reading
- Midwinter 2019 Hold public hearing on RBMS PS

#### Between Midwinter 2019 and Annual 2019

- February 2019 Close reading/public comment closes
- Spring 2019 Revise RBMS PS based on feedback
- ? enter PS in Toolkit

## **BSC 2018-04-04 Virtual Meeting Appendix B**

### **RBMS PS Work by Task**

#### Outstanding Sections

- Examples
  - Finish examples (assigned to Catherine, Ellen, Iris, Linda, and Lori), goal complete by ALA Annual 2018.
- Glossary
  - Form small group to draft glossary definition by Mid-April 2018.
  - Complete draft by ALA Annual 2018
- Graphics
  - Draft remaining guidelines(Assigned to Ellen and Liz), anticipated due date April 2, 2018)
  - Wordsmith (April and May 2018)
- Relationship chapters
  - Work to commence once 3R is finished, tentatively June 2018
  - Tentative deadline for completion, September 2018

#### 3R revisions

- Draft game plan for tackling 3R revisions by Annual 2018 (assuming 3R meets their June deadline)
- Work to commence post ALA annual, tentatively July 2018
- Tentative deadline for completion, Thanksgiving 2018

#### Review

- Pre-3R discussion (between now and Annual)
  - Topics/questions
    - Extent, retaining DCRM practice (3.4.5)
    - Layout and typography. (Numerous places RDA specifies to record elements “in the order indicated by the sequence, layout, or typography” (example 2.5.7.3 Recording Parallel Designations of a Named Revision of an Edition). RBMS wording “indicated by the sequence of the designations on the sources of information”)
    - Relationship of RBMS PS to the LC-PCC PS and BSR/CSR.
- Hold 2 virtual meetings, one early April/one Mid-May.
- Public hearing at ALA Midwinter 2019
- Close Reading (tentatively Dec 2018-Feb. 2019; will know better when RSC reveals update schedule)

#### Revise documents based on feedback

- Spring 2019

#### Enter PS in Toolkit

- ?, know better after Oct. 2018, RSC meeting