



**INTERNATIONAL FEDERATION OF LIBRARY ASSOCIATIONS AND
INSTITUTIONS**

**WORLD LIBRARY AND INFORMATION CONGRESS
78th IFLA GENERAL CONFERENCE, HELSINKI, FINLAND
11-17 AUGUST 2012**

**STANDING COMMITTEE
CATALOGUING SECTION
(CATS SC)**

Meetings: Standing Committee I (SC I), Saturday, August 11, 9:15-11:45 (Ballroom 1)
Standing Committee II (SC II), Tuesday, August 14, 13:15-14:45 (Room 208)

Chair: Hanne Hørl Hansen
Secretary: Miriam Säfstöm

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MINUTES: SC I

Standing Committee I: Saturday, August 11, 9:15-11:45, Ballroom 1
For attendance, see p. 11-13.

1. Welcome and introductions

The Chair, Hanne Hørl Hansen, welcomed all Standing Committee (SC) members, and observers. This was followed by brief introductions of the SC members, as well as of observers.

2. Agenda

All SC members approved the agenda.

3. Minutes of 2011 meetings in San Juan

The minutes (http://www.ifla.org/files/cataloguing/reports/meeting_2011.pdf) were approved as written.

4. Announcements

4.1 Division and Section programmes

The Chair, Hansen, announced the Section Programme to be held on Sunday, 12 August 2012, from 13:45–15:45. The theme is “Inspired moments in cataloguing!” and the programme includes four papers:

The gap between users and cataloging by Zhai Xiaojuan and Nie Na (Nanjing University Library, Nanjing, Jiangsu Province, China)

Metadata with levels of description: new challenges to catalogers and metadata librarians by Myung-Ja Han (University of Illinois at Urbana Champaign, Urbana, Illinois, USA)

Digital services in a new digital library - new ways of presenting the library catalogue by Asgeir Rekkavik and Anne-Lena Westrum (Oslo Public Library, Deichmanske bibliotek, Oslo, Norway) and Kim Tallerås (Oslo and Akershus University College of Applied Sciences, Oslo, Norway)

L'infrastructure de l'information et les besoins des utilisateurs: tout le pouvoir aux données structurées! by Vincent Boulet (Bibliothèque nationale de France, Paris, France)

4.2 Thanks to translators

The Chair extended her warm thanks to all translators who have helped with the programme papers.

5. Future Cataloguing Section programmes

5.1 79th IFLA WLIC in Singapore, August 17-23, 2013

The Section has received a proposal from the Audiovisual & Multimedia Section. They propose a joint session on the cataloguing of audiovisual material and multimedia, metadata and standards. Particularly they want to focus on ways to get metadata for the digitized collections of audiovisual materials, which are growing fast.

A meeting with the chair of the Audiovisual & Multimedia Section is planned today. The SC agreed that this is an interesting suggestion and asked the Chair and Secretary to move forward on this.

5.2 Satellite meeting 2014

The SC has discussed organising a satellite meeting on RDA as a follow-up to the 2011 meeting. It must be decided well in advance to allow us to be prepared for the IFLA procedure for such meetings.

The SC agreed that a satellite meeting is a good idea, and that we should proceed with the planning. The venue for the 80th IFLA WLIC meeting had at this time not been announced (though we know it will be in Europe).

6. Reports

6.1 FRBR Review Group and subgroups

Pat Riva, Chair of the FRBR Review Group (RG), submitted a report of activities of the FRBR RG 2011-2012 (Appendix I).

6.2 ISBD Review Group: the PC's request for strategic plan

Central funding of section projects was very limited this year. IFLA CATS is a busy section, and the section subgroups had applied for funding of several projects. Some of these received funding, some did not. The ISBD Review Group (RG) did not receive funding for the projects they planned. The Professional Committee (PC) however wanted to know more about the Review Group and what the strategic plan for the ISBD standard looks like. During this IFLA WLIC, ISBD RG Chair Mirna Willer, CATS SC Chair Hanne Hørnl Hansen, and Division III Chair Tone Moseid will meet and discuss this issue.

6.2 ISBD Review Group and subgroups

Mirna Willer, Chair of the ISBD Review Group (RG), submitted a report of activities of the ISBD RG and the ISBD/XML Study Group for the period 2011-2012 (Appendix II).

6.3 IFLA Namespaces Technical Group

The IFLA Namespaces Technical Group was formerly known as the IFLA Namespaces Task Group. It is affiliated with the Classification and Indexing Section, but its work is of great interest to the Cataloguing Section. Gordon Dunsire chairs the group. A report of Task Group activities up to June 2012 can be found at <http://www.ifla.org/node/5353>.

6.4 IFLA Committee on Standards

Patrice Landry presented the new IFLA Committee on Standards. The Committee will support and advise the Professional Committee (PC) on all standards-related work (not only bibliographic standards). They will have their first physical meetings during this IFLA WLIC. The Committee also plans an open session the 16th of August 10.45-12.45.

7. Strategic Plan 2011-2013 / Action plan 2012

In November 2011 the CATS strategic plan for 2011-2013 (<http://www.ifla.org/en/node/1959>) was adopted. At the SC meeting in San Juan 2011 it was decided that some items in the strategic plan should be discussed at this year's meeting. These were:

- Is a review of the Statement of International Cataloguing Principles (ICP) needed? (CATS strategic plan, 1.3)
- Should the ICP be expanded to form an international cataloguing code (is it needed, is the goal realistic)? (CATS strategic plan, 1.4)

7.1 CATS strategic plan, 1.3 (Need for review of the ICP?)

A working group consisting of Agnese Galeffi, Dorothy McGarry and Dave Reser has prepared a report on this question (see Appendix III). The conclusion of the group is that the ICP needs to be updated. Among the reasons for this are that this might result in a clearer statement of the goals and objectives of the ICP (the scope of the document is currently broader than its title implies). Also, work has been going on since the ICP was published, and currently its user tasks do not include those mentioned in FRAD ("contextualize" and "justify"), or FRSAD ("explore").

A discussion followed. The ICP must be general, so it does not have to be updated too often. There is ongoing work on aligning the IFLA standards mentioned in the ICP; should the review work start now, it must follow this alignment process closely.

It was decided that another working group should start to plan for the ICP review, taking these considerations in mind. Galeffi, Reser and McGarry were all willing to continue the work. It was also decided that the FRBR and ISBD RGs should name representatives that could serve as liaisons to these groups and make sure that the consolidation of FRBR/FRAD/FRSAD and the alignment ISBD/RDA are taken into account.

7.2 CATS strategic plan, 1.4 (Strategy on international cataloguing code)

Hansen and Säfström presented a discussion paper on the subject (See Appendix IV).

It was concluded that the CATS should not aim to form an international cataloguing code. The Cataloguing Section should however continue to take a leadership and partnership role in international cataloguing work. CATS products such as the ICP, the FR family and the basic elements for descriptive cataloguing from the ISBD form the backbone of evolving cataloguing codes such as RDA.

It was decided that Section 1.4 in the strategic plan should be deleted.

7.3 Changes in the strategic plan/actions

An updated version of the strategic plan will be prepared. According to new IFLA instructions the sections must formulate action plans, listing at least three actions. The Chair will draft an action plan and circulate to the SC members.

8. Adjournment

The Chair adjourned the meeting at 12.15 until Tuesday, 14 August.

MINUTES: SC II

Standing Committee II: Tuesday, 14 August 11:30-13:00, Room 208

For attendance, see p. 11-13.

9. Welcome

The Chair, Hanne Hørnl Hansen, welcomed all Standing Committee (SC) members and observers to this second meeting of the CATS SC. This was followed by brief introductions of the SC members and the observers.

10. Agenda

The agenda was updated with some items (inserted below).

11. Reports, part II

11.1 American Library Association: Committee on Cataloging: Description and Access

Jay Weitz, liaison to the American Library Association Committee on Cataloging: Description and Access (ALA CC:DA), presented two reports from the Committee meetings at ALA Midwinter and ALA annual meeting (Appendix V-VI).

11.2 SCATNews

Unni Knutsen, the newsletter editor, explained how she in the last two issues of SCATnews has aimed for a greater diversity and a broad representation from many different countries and regions. If SC members or observers would like to contribute to SCATNews or know of any interesting content, please contact the editor.

Right now an online survey about the content of SCATnews is going on. The deadline is November. A link to the survey will be sent to the SC members via e-mail.

11.3 IFLA website

Agnese Galeffi, CATS information coordinator, reported that the IFLA website has just been updated. It now includes more translations of ISBD consolidated, and many different background documents.

This year, Galeffi will look into social media as an information channel. A short discussion of the pros and cons of information via blogs and tweets followed.

11.4 IFLA Committee on Standards

Anders Cato is the Division III (Library Services) representative on the Committee on Standards. As the first meeting of this group had not yet taken place at the time of the SCII meeting, he had nothing new to report.

The purpose, role and function of the Committee were discussed. At the CATS SCI, Patrice Landry invited input on this. There will be opportunity to discuss further at the open session of the Committee on Standards.

An important issue for the Committee on Standards is the publication of IFLA standards on the web. The CATS has raised this question for many years (see also 12.1 below). Not to make the standards available is counter-productive as it hinders the uptake. Hopefully the Committee on Standards can solve this. In any case information on the progress on this question must be posted on the IFLA website.

The Committee on Standards will play an important part in advising the PC in the funding of standards-related projects. A large portion of the bibliographic standards work is however the ongoing maintenance work. The CATS sees a danger in this competing with other, more “lively” projects. A solution could be that part of the funds is reserved for the maintenance of existing IFLA standards.

During the WLIC meetings of the CATS subgroups it has been discussed whether some of those who handle general, strategic questions (e.g. the Namespaces Technical Group) should have a more natural place under the Committee on Standards. This is however a question that cannot be solved until December, at the earliest. For the moment the structure is unchanged.

11.5 Anonymous Classics, Names of Persons – status and future

Anonymous classics:

The Chinese list of Anonymous Classics has been published on the website thanks to Ben Gu and information coordinator Galeffi.

Names of persons:

The solution discussed for names of persons is some kind of inclusion in VIAF. Anders Cato has written to Thom Hickey, but has as yet not received an answer. SC members reported from the VIAF meeting that VIAF is now feeding directly into ISNI (International Standard Name Identifier). Another solution for *Names of persons* might be going directly to ISNI? A problem with *Names of persons* is that few national libraries have contributed their local principles, and some of those who have have not updated this information for a very long time. At the same time some have sent in new information. While we are exploring new ways of handling *Names of persons*, we must find a practical way to approach this. It was decided that a working group should be formed. This consists to begin with of Anders Cato and Françoise Leresche.

11.6 MulDiCat

Anders Cato and Gordon Dunsire reported that most of the MulDiCat content (about 90%) by this time had been published in the Open metadata registry (OMR) (<http://metadataregistry.org/vocabulary/show/id/299.html>). To have it published in this way benefits everybody and makes it easier to take advantage of the multilingual content. It allows for full version control and will make it possible for new translations to be incorporated by the translators themselves. This solution also allows for extended intended uses: when MulDiCat terminology is used in the future, it can be marked up and the multilingual content in that way be linked directly into the documents.

The OMR publication of MulDiCat has already proven useful in the translations of papers for this year’s open session.

12. Announcements

12.1 Leadership Forum of the Library Services Division

The Chair reported from the Leadership forum. Much of the information was focused on the funding of projects vs. administration costs. With limited means, the Professional Committee (PC) wants to favour the IFLA projects. Administration funds have earlier been based on the number of section members. As the funds have rarely been used, they have proved hard to handle in the IFLA budget. For 2012 each section is provided the amount of 400 euros, regardless of how many members it has.

When applying for funding, a project can run for two years at the most. This has practical reasons that have to do with mandate time for IFLA officers. At the same time it can be troublesome for really long projects that can only be funded two years at a time.

The question of web publication of the IFLA standards was raised again. That standard documents are not freely available is a problem not only for CATS, but also for other sections. IFLA as an organisation must strive to make this information accessible for all, and help the uptake of IFLA standards.

At the leadership forum the question about satellite meetings was raised. These have to be planned a long time in advance. Many sections have experienced problems with making this planning when the place for the next suitable IFLA WLIC is not announced until the last day of the conference, after which few meetings are held. IFLA headquarters replied that it plans to take a more active part in the planning of satellite meetings, and e.g. compile lists of local organisations/institutions that are willing to host such events, and also look at possible funding solutions for these.

At the Division IV (Support of the profession) leadership brief there had been a heated discussion about the forms for the Leadership Brief and the Division Leadership Forum. It was considered too much one-way communication. Much of the information given could probably be sent in advance, and the time could then be spent with questions and answers to the Governing Board (GB) and the Professional Committee (PC).

13. Finances

Miriam Säfström, the Section treasurer, presented the financial report that had been sent out earlier (see Appendix VII).

13.1 Financial report, August 2012

The Section overspent its allotment by some hundred euros, but this was authorized by the PC at its December meeting.

13.2 Budget for 2012/2013

The proposed budget for 2013 includes some uncertainties, as it was drafted before the SC meetings. The SC has now decided that the review of the ICP will be started, but has at yet not discussed the costs. For the meantime the Namespaces Technical Group will remain under the Classification and Indexing Section, and its project funding be a part of the budget of this section and/or the Cataloguing Section.

14. Evaluation of Cataloguing Section programme 2012

The Section programme this year consisted of a satellite conference on “Bibliography in the digital age” in Warsaw and the open program “Inspired moments in cataloguing” in Helsinki.

The Satellite meeting was organised by the Cataloguing section together with the Bibliography section. The National Library of Poland served as host and most generously supplied the conference venue, lunch and the organisation team. This meant there was no need for a conference fee. The meeting was attended by about 70 persons, which is a good turnout, considering the specialized content. The programme combined presentations from a call for papers with a “tour around the world” where invited speakers talked on the subject. National bibliographies were in focus, but the angle was a cataloguing/metadata one and the result was very good.

This year’s open programme “Inspired moments in cataloguing” was held Sunday, August 12th and was very well-attended.

The organising group explained the selection process, in which they had tried to make room for different countries and show many aspects. Some discussion on the programme followed. It is hard to find a good level of the presentations. Our section wants to communicate with the larger community, but at the same time we have a highly specialised crowd, to whom we want to give something inspiring/state-of-the-art to take home. Maybe the balance could be made easier with clearer instructions/guidelines to the speakers on who our audience is?

The Satellite meeting was a good case for combining a call for papers with invited speakers. Key people could also be approached or encouraged to write papers. Many SC members missed the Section report that used to be a standing feature at the open programme. The Chair considered this a good point and promised that this would be re-introduced in 2013.

15. Other business

15.1 CATS subgroups: update on Helsinki meetings

As the SCII was held very early, the subgroups had not had all their planned meetings at this time. See Appendix VIII-IX.

ISBD Review Group (RG)

During the year, the RG has concentrated on the consolidation of ISBD with RDA element set (ISBD/RDA alignment), RDA/ONIX Framework (ISBD/ROF mapping) and FRNR model (preliminary mapping).

Two documents have been produced, and will be sent to CATS SC for approval.

These concern 1) Alignment of ISBD and RDA element sets, and 2) Mapping of ISBD Area 0 vocabularies to RDA/ONIX framework vocabularies.

A third effort has been discussed during IFLA WLIC. This project has been called the “National Bibliographic Agency Profile”, but the name is misleading and has led to some confusion. The project and resulting report is about the ISBD/RDA application profile with the addition of guidelines regarding mandatory elements and choice of alternatives and options. The work is in progress, but if funding for a face-to-face meeting in

September 2012 will be approved, the first draft could be expected to be distributed by the beginning of 2013.

As mentioned earlier, the chair of the ISBD RG has been in contact with the chair of Division III, in order to make clear RG priorities and further explain the goal of the projects for which funding was asked. In these discussions this project, which is close to complete, has been put forward as something that is possible to finalise with a small amount of funding. This would then be used for a face-to-face meeting, which is sometimes the most effective way to settle decisions and put together reports.

The ISBD RG now plans to apply for funding to finish the application profile. The Bibliography Section will be informed, as they can give input to the application profile, even though it is not, as was originally perceived, a national bibliographic agency profile. The working group will also keep contact with the Namespaces Technical Group and the DCMI, as the latter are also working with an application profile. The report will be sent to CATS for input as soon as there is a document draft.

FRBR Review Group (RG)

At their meeting the FRBR RG discussed issues raised by the ISSN network, which feeds into the ongoing consolidation process of the FR family of conceptual models (FRBR, FRAD and FRSAD). The RG also received a report about the EURIG Working Group on Aggregates. EURIG is the European RDA Interest Group, and the Working Group (WG) on Aggregates is meant to be an informing group that concerns itself with the handling of aggregates in RDA. The WG is meant to be a forum for discussion of possible solutions, but also group that points the FRBR RG to what questions are not sufficiently solved in the conceptual model of today, once again something that will feed into the consolidation process.

Elena Escolano was named as the FRBR RG liaison to the ICP working group (see 7.1 above).

After the IFLA WLIC the FRBR RG plans a working meeting to continue the consolidation between the conceptual models of the “FR family”.

Statement on Universal Bibliographic Control (UBC)

The statement on UBC originally drafted by the Bibliography Section has been circulated to relevant sections, among those CATS, and has received some good comments. Next step is to promote the statement within IFLA, to ensure that effort is put into this area.

15.2 Reports from other institutions

No reports were given.

15.3 Update on future Cataloguing Section programmes

79th WLIC in Singapore: August 17-23, 2013: Joint session with the Audiovisual & Multimedia Section

Representatives from the SC have had a meeting with the chair of the Audiovisual & Multimedia Section, Marwa el Sahn, and two of her SC members. The meeting was very inspiring, and we are at the moment aiming for a three hour joint session. A programme draft will be circulated to the SC members.

80th WLIC in 2014 (later announced to be Lyon, France)

The Section plans for a Satellite conference on RDA before or after the WLIC. More information will follow.

15.4 ISBD strategy

The ISBD RG has had reason to discuss its strategy during this week. At the same time as the group is busy with moving the standard forward (alignment ISBD/RDA, ISBD expressed in namespaces), the group is responsible for updating ISBD consolidated, having translator contacts and so forth. In the strategic plan for the group it must be clear what future is envisioned for the ISBD standard, and how it is meant to play together with e.g. RDA. The RG is working on a clarification of its current strategic plan. As the ISBD work forms an important part of the CATS strategic plan, this is something the SC will have to consider when this is updated.

16. Adjournment

The chair thanked all those present and adjourned the meeting.

ATTENDANCE: SC I

Standing Committee members present:

Viktoria Barsukova	National Library of Russia
Anders Cato	Gothenburg University Library, Sweden
Christine Frodl	Deutsche Nationalbibliothek, Germany
Agnese Galeffi	Vatican School of Library Science, Vatican; Italy
Ben Gu	National Library of China
Tuula Haapamäki	National Library of Finland
Hanne Hørl Hansen	Danish Library Center, Denmark
Unni Knutsen	Oslo and Akershus University College of Applied Sciences, Norway
Françoise Leresche	Bibliothèque nationale de France
Dorothy McGarry	University of California, Los Angeles, USA
Milena Milanova	Sofia University, Bulgaria
David Reser	Library of Congress, USA
Pat Riva	Bibliothèque et Archives nationales du Québec, Canada
Miriam Säfström	National Library of Sweden
Bettina Wagner	Bayerische Staatsbibliothek, Germany
Jay Weitz	OCLC (Online Computer Library Center), USA

Standing Committee members absent:

Ana Barbarić	University of Zagreb, Croatia
Cha Kyung Lee	National Bibliographic Control Center, The National Library of Korea
Filiberto Felipe Martínez Arellano	National University of Mexico
Patrizia Martini	ICCU (Central Institute for the Union Catalogue of Italian Libraries), Italy

ATTENDANCE: SC II

Standing Committee members present:

Viktoria Barsukova	National Library of Russia
Anders Cato	Gothenburg University Library, Sweden
Christine Frodl	Deutsche Nationalbibliothek, Germany
Agnese Galeffi	Vatican School of Library Science, Vatican; Italy
Ben Gu	National Library of China
Tuula Haapamäki	National Library of Finland
Hanne Hørl Hansen	Danish Library Center, Denmark
Unni Knutsen	Oslo and Akershus University College of Applied Sciences, Norway
Françoise Leresche	Bibliothèque nationale de France
Dorothy McGarry	University of California, Los Angeles, USA
Milena Milanova	Sofia University, Bulgaria
David Reser	Library of Congress, USA
Pat Riva	Bibliothèque et Archives nationales du Québec, Canada
Miriam Säfström	National Library of Sweden
Bettina Wagner	Bayerische Staatsbibliothek, Germany
Jay Weitz	OCLC (Online Computer Library Center), USA

Standing Committee members absent:

Ana Barbarić	University of Zagreb, Croatia
Cha Kyung Lee	National Bibliographic Control Center, The National Library of Korea
Filiberto Felipe Martínez Arellano	National University of Mexico
Patrizia Martini	ICCU (Central Institute for the Union Catalogue of Italian Libraries), Italy

ATTENDANCE OBSERVERS (SCI and SCII)

		SCI	SCII
Harriet Aagaard	Stockholm Public Library, Sweden		X
Helena Afleche	Lappeenranta City Library	X	
Carsten Andersen	Danish Bibliographic Center	X	
Elsa Barber	National Library of Argentina		X
Julianne Beall	Library of Congress, USA	X	X
Jo-Anne Bélair	Bibliothèque de l'Université Laval, Canada	X	X
Maria Violeta Bertolini	Centro de Economia Internaonal	X	X
Bobby Bothmann	Minnesota State University, USA	X	X
Vincent Boulet	Bibliothèque nationale de France		X
Pino Buizza	Biblioteca Queriniana, Italy	X	X
Dovote Chlopouske	University of Wrocreis, Poland		X
Maria Inés Cordeiro	Biblioteca Nacional Portugal	X	X
John DeSantis	Dartmouth College, USA	X	X
Gordon Dunsire	Consultant, UK	X	X
Elena Escolano	Defense Ministry, Spain	X	X
Ursula Freyschmidt	German Bundestag Library	X	
Rosa Maria Galvão	National Library of Portugal	X	X
Massimo Gentili-Tedeschi	Biblioteca Nazionale Braidense, Italy	X	X
Angela Green	Texas A&M at Quatar, Qatar	X	X
Daryl Green	University of St Andrews, UK	X	
Rowena Griem	Yale University, USA		X
Mauro Guerrini	University of Florence, Italy	X	X
John Hostage	Harvard University, USA	X	X
Lynne Howarth	iSchool of Toronto, Canada	X	X
Leena Huhta	Lohjan kaupunginkirjasto, Finland		X
Maarit Hultunen	National Library of Finland		X
Gildas Illien	Bibliothèque nationale de France		X
Marina Ivanova	National Library of Finland		X
Grazyna Jaroscewicz	National Library of Poland		X
Natalia Kasparova	Russian State Library, Russia	X	X
Irena Kavčič	National and University Library, Slovenia	X	X

Ouafae Kchibel	National Library of Morocco		X
Minna Koistinen	Sarinia UAS, Finland		X
Maria Kovero	Helsinki University Library, Finland	X	X
Piijo Laitonen	Helsinki University Library, Finland		X
Jaesun Lee	National library of Korea	X	X
Sinikka Luukkanen	National Library of Finland	X	X
Tatiana Maskhulia	Presidential library, Russia	X	X
Lea Mentunen	Lappeenranta City Library	X	
Eeva Murtomaa	National Library of Finland	X	X
Tadahiko Oshiba	National Diet Library, Japan	X	X
Fedérica Paradisi	National Library of Italy	X	X
Glenn Patton	OCLC (Online Computer Library Center), USA	X	X
François-Xavier Pelegrin	ISSN International Centre, France	X	X
Silva Rintanen	Social Insurance Institution, Finland		X
Sandy Roe	Cataloging & Classification Quarterly, editor-in-chief	X	X
Jarmo Saarikko	Finnish Forest Research Institute	X	
Irja-Leena Sakonen	Helsinki University, Finland		X
Ricardo Santos	National Library of Spain	X	X
Julia Selivanova	Presidential Library, Russia	X	X
Liliana Serra	Prima Informatica	X	
Marja-Liisa Seppälä	National Library of Finland	X	X
Katerina Sornova	National Library of Finland		X
Maria Stegaeva	Presidential library, Russia	X	X
Katarina Švab	University of Ljubjana, Slovenia	X	X
Anna Swärd Bergström	Umeå University Library, Sweden	X	X
Barbara B. Tillett	Library of Congress, USA	X	X
Elisabet Viktorsson	BTJ, Sweden		X
Kiti Vilkki-Eriksson	BTJ Finland		X
Mirna Willer	University of Zadar, Croatia	X	X
Pekka Yliluoma	Oulo University Library, Finland		X
Janis Young	Library of Congress, USA		X
Elena Zagorskaya	National Library of Russia	X	
Maja Žumer	University of Ljubjana, Slovenia		X

APPENDIX I: FRBR RG: Report of activities 2011-2012

Working Group on Aggregates

The **Working Group on Aggregates**, chaired by Ed O'Neill, submitted its final report on September 12, 2011 after holding two meetings during the San Juan conference and a final web meeting. The Review Group accepted the report with thanks and agreed to consider its recommendations and the analysis of types of aggregates during the FR family consolidation process.

The report is posted at: <http://www.ifla.org/en/node/923>

Publications

Errata were issued for both FRAD and FRSAD in fall 2011. A description of the changes is included in the FRBR Review Group update which appeared in *SCATnews* no. 36 (December 2011).

The first translations of FRSAD were published in 2011-2012: French, Korean and Spanish. FRAD was also translated into Korean, bringing the number of completed translations of FRAD to nine. A citation to the published translation of FRBR into Portuguese was added to the FRBR translations listing, there are presently 19 translations of FRBR available.

Cataloging & Classification Quarterly v.50, no.5/7 (2012) is a special theme issue titled *The FRBR Family of Conceptual Models: Toward a Linked Future*, guest edited by Richard P. Smiraglia. It is being co-published as a monograph. While the special issue was not a project of the FRBR RG, several members participated actively, as co-editors and as authors. The foreword is by Patrick Le Boeuf. Articles on representing the FR family in the semantic web, modeling aggregates, FRBRoo, and the treatment of name entities in the FR family of models, relate directly to work carried out by the Review Group.

Namespaces

The Review Group resolved the remaining issues related to the declaration of namespaces for the FRBR family of conceptual models at its post-IFLA meeting on August 19, 2011 which enabled the FRAD and FRSAD element sets in the Open Metadata Registry (OMR) to be set to "Published" status. The element set for FRBRer had been set to "Published" status in May 2011, meaning that the declarations can be used in applications. The namespaces can be accessed at: <http://iflstandards.info/ns/fr/>. The Group continues to monitor and liaise on use of the namespaces, and others based on the FR models, by developers and related communities.

Dereferencing services for the IFLA namespaces were implemented in March 2012. The services return human-readable information associated with a namespace URI when it is entered in a standard Web browser, and machine-readable data when a semantic browser is used. Dereferencing was set up following requests from external users and uses a script developed by Metadata Management Associates which resides on the IFLA server and redirects URI/URL requests to the OMR where the namespaces are maintained. This development was paid for by the FRBR RG. The actual technical implementation of namespace functionality is the responsibility of the IFLA Namespaces Task Group, chaired by Review Group member Gordon Dunsire. More information is available in the articles *Functional Requirements namespaces published* and *Update on cataloguing namespaces* in *SCATnews* no. 37 (June 2012).

The chair gave presentations on the development of FRBR family namespaces at the *Five Years On* seminar (jointly with ISBD RG) on April 27 in London and at the Seminar *Global Interoperability and*

linked data in libraries on June 18-19 in Florence which will be published in the respective proceedings.

Consolidation of the IFLA Conceptual Models

On April 25, 2012 the FRBR RG held a full-day mid-year meeting at the British Library in London, to work on consolidation of the entity-relationship models. The result is a proposed statement of users and five user tasks that encompass the three models. A full report is included in *SCATnews* no. 37 (June 2012). The RG gratefully acknowledges the support of the British Library which provided a meeting room. Additional project funding received from the PC for 2012 was essential in supporting the travel expenses of several members. The RG has booked a working meeting for August 10, 2012 prior to IFLA WLIC in Helsinki to continue the consolidation work.

The current focus of the International Working Group on FRBR-CRM Harmonisation is to extend FRBRoo to include the entities, attributes and relationships from FRAD and FRSAD. In 2011-2012 another two meetings have been devoted primarily to this work. The 18th FRBR-CIDOC CRM meeting was held at the Meertens Institute in Amsterdam, Netherlands, on November 14-17, 2011. The analysis of the FRAD relationships was completed, and the class and property descriptions previously begun were refined. The balance of the 2011 FRBR project funds, along with assistance from the Classification & Indexing Section administrative funds, enabled FRBR Review Group representation at this meeting. The 19th FRBR-CIDOC CRM meeting was held at the University of Heraklion in Crete, Greece, April 30-May 3, 2012. At this point all the class and property descriptions resulting from FRAD and FRSAD have been completed, and only editorial work remains to be done. The goal is to issue this consolidated version 2.0 of FRBRoo for comment in 2012 and also to include an FRBRoo namespace in the OMR.

Liaison Activities

This year the FRBR RG has had formal and informal exchanges with several other groups.

- The FRBR RG is discussing with the ISBD RG regarding issues of alignment of the ISBD data elements and the FRBR attributes. Mirna Willer, chair of the ISBD RG, attended the FRBR RG working meetings in 2012.
- Several members of the FRBR RG are members of the EURIG Working Group on Aggregates created at the EURIG Technical Meeting held January 27, 2012.
- Members of the FRBR RG, in non-FRBR capacities, attended a meeting with the ISSN Network on April 24, 2012 in Paris. This is leading to more formal transmission of issues from an ISSN point of view for FRBR.
- On April 26, 2012 the chair and several members of the RG attended the meetings of two DCMI task groups.

Discussion List

The frbr@infoserv.inist.fr discussion list currently has 830 subscribers, a slight decrease. Pat Riva and Patrick LeBœuf remain the co-listowners. The automated list archive starting in December 2010 is accessible from <http://infoserv.inist.fr/wwsympa.fcgi/arc/frbr>.

Pat Riva
Chair of the FRBR Review Group
July 28, 2012

APPENDIX II: ISBD RG and ISBD/XML Study group: Activity report 2011-2012¹

I. Objectives of the ISBD RG & Plans for Activities: 2011-2013²

The publication of the ISBD consolidated edition in 2011 marks the end of the second general review and revision of the standard, and thus opens the need for the ISBD Review Group to define its future field of work.

The ISBD Review Group's main objective is to maintain the standard according to the IFLA Cataloguing Section's Strategic Plan 2011-2013, Actions 3 **Continue ISBD Revision** and 4 **Develop additional approaches, standards, rules, and lists for information that provide access to bibliographic and authority data in all languages**, based on the tasks to:

- 1) Promote the use, translation and implementation of the ISBD in library systems and services, and national cataloguing rules.
- 2) Prepare documentation for the next revision of the standard due to begin in about four years.

II. Reports

ISBD/XML Study Group

The aim of the ISBD/XML SG Review Group to explore and further develop the representation of the ISBD in the W3C RDF standard to enhance the portability of bibliographic data in the Semantic Web environment. The following activities were planned and performed:

- 1) **The namespaces for the Consolidated ISBD were published** in the Open Metadata Registry (OMR) in January 2012: available at <http://iflstandards.info/ns/isbd/> (news at <http://www.ifla.org/en/news/isbd-namespaces-published>)
- 2) **Development of the ISBD Application Profile**: DC Application Profile is still under development by DCMI, but ISBD is used by the DCMI as a case study.
- 3) **Maintenance of translations of the ISBD namespace** using the OMR service, and in collaboration with the ISBD RG develop *Guidelines for use of ISBD as Linked Data*: the work evolved into the *Translations of RDF representations of IFLA standards, version 1.0, 9 April 2012*, which was forwarded for comments to the ISBD RG and the DCMI Vocabulary Management Community Task Group in April 2012. It was decided that the maintenance of this document should be transferred to the Namespaces Task Group, as its scope now goes beyond ISBD and extends to the FRBR model family and possibly UNIMARC.
- 4) Development of the **alignments of ISBD data elements and vocabularies** with other namespaces:
 - a. *Mapping of ISBD area 0 vocabularies to RDA/ONIX Framework vocabularies, version 1, 4 April 2012*, was forwarded for comments to the ISBD RG and the DCMI Bibliographic Metadata Task Group in April 2012, and to the JSC for the Development of RDA in August 2012. This corresponds to Action 23 of

¹ For a detailed report of the ISBD RG and ISBD/XML SG from August to December 2011 see: Mirna Willer and Françoise Leresche. News from the ISBD Review Group: Plans for Activities: 2011-2013 & Activities since August 2011. In: SCATNews 36(December 2011) <http://www.ifla.org/files/cataloguing/scatn/scat-news-36.pdf>

² See Objectives on ISBD RG's webpage at: <http://www.ifla.org/about-the-isbd-review-group>

the Outcomes³ of the Glasgow ISBD RG and ISSN Network with JSC/RDA Harmonization Meeting.

- b. ISBD/RDA alignment: members took part in these activities (see below the report on the Project, Glasgow Meeting, November 2011)
 - c. ISBD/UNIMARC namespaces alignment: postponed due to the lack of decision in the PUC
 - d. ISBD/FRBR namespaces mapping: the relations between the Resource class (ISBD) and the Work, Expression, Manifestation, and Item classes (FRBR) should be investigated further and specified: project⁴ proposed for 2012 was not funded; the work is postponed for 2013.
- 5) **Develop and make available guidelines on appropriate use of the ISBD namespaces** by creators of instance triples *Guidelines for use of ISBD as Linked Data* (together with the ISBD RG): project proposed for 2012 was not funded; the work is postponed for 2013.

The members of the group had two ad hoc meetings (Glasgow & Edinburgh, November 2011; Zadar, June 2012), participated in one working group meeting (DCMI, Hague, 2011), and had presentations at six international conferences and seminars.

Perspectives for the ISBD/XML SG: (1) A name change should be considered as it does not show its actual activities; (2) “now that the task of publishing ISBD elements and vocabularies in RDF is completed, the SG’s role is about to change: in addition to defining an application profile and maintaining ISBD namespaces as a follow-up to the revisions of the Consolidated ISBD, its activity will consist increasingly of creating mappings with other bibliographic standards, and liaising the ISBD with the Semantic Web communities. It begs the question of whether this liaison work could not be carried out more usefully and more efficiently at the level of bibliographic standards by the Cataloguing Section (covering both ISBD and FRBR), rather than only at the level of ISBD by the ISBD RG. As a consequence, the composition (and chairing) of the SG should be reviewed so as to ensure that all relevant standards be represented. This issue must be discussed in Helsinki, within the Cataloguing Section. The decision can depend on further development related to bibliographic standards bodies in the context of the Semantic Web – discussion is expected to start within Standards Committee meeting in Helsinki.” (F. Leresche, ISBD/XML SG’s chair)

ISBD Review Group

The ISBD RG proposed three part project Interoperability of ISBD within Linked Data environment⁵ for funding in 2012, but it was refused. Some of the planned activities were been realized by the ISBD/XML Study Group, and some by the members of the ISBD RG.

1) Project report

August – December 2011: Project no. D3.4.13-1/11 *IFLA ISBD RG and JSC/RDA meeting on alignment and interoperability of standards* funded the ISBD Review Group, ISSN Network and JSC for Development of RDA harmonization meeting, Glasgow, UK, November 3-4, 2011: the

³ http://www.ifla.org/files/cataloguing/isbdrg/JSC_ISBD_ISSN_Outcomesfinal.pdf

⁴ On the proposed project *Interoperability of ISBD within Linked Data environment* see: <http://www.ifla.org/en/node/6172>

⁵ Ibid.

result of the meeting were the Outcomes⁶ which required further funding in 2012, however, the funding was refused. Under these circumstances, the following has been done by August 2012:

- a. Action 6: *National Bibliographic Agency Application Profile* – work still in progress
- b. Action 24: *Alignment of the ISBD: International Standard Bibliographic Description element set with RDA: Resource Description & Access element set, Draft version 1, 25 July 2012*: it was forwarded for comments to the ISBD RG, to the DCMI Bibliographic Metadata Task Group in April 2012, and to the JSC for the Development of RDA in August 2012. To be formally approved at the Helsinki meeting, 2012.
- c. Actions related to the musical presentation statement and ISSN issues will be developed and reported by the IAML and ISSN Network representatives to the ISBD RG at the Helsinki meeting, 2012.
- d. The RDA/ISBD mapping: project proposed for 2012 was not funded; the work is postponed for 2013.

2) Other

- a. Translations of ISBD:
 - a. Preliminary consolidated edition, 2007: Spanish, Italian, French, Latvian, Serbian
 - b. Consolidated edition, 2011: Chinese, Italian (to be published in August 2012); reported translations in progress: Croatian
- b. Meetings and presentations (see the above under ISBD/XML SG); FRBR Review Group's meeting, London, April 2012: FRBR consolidation meeting
- c. Cataloguing Section's ISBD - Strategic Plan: the chair gave information on the Group's plans and projects

For detailed information, and in-depth discussions of certain issues, please see, apart from the cited August-December 211 report, the report of the ISBD/XML Study Group,⁷ ISBD Review Group's draft meeting agenda, and cited references to relevant documentation.

Mirna Willer, ISBD Review Group chair
Zagreb, 6 August 2012

⁶ Outcomes.

⁷ http://www.ifla.org/files/cataloguing/isbdrg/isbd-xml-activities_2011-2012.pdf

APPENDIX III: IFLA CATS Strategic plan: is an Update of ICP Needed?

Report on IFLA CATS Strategic plan section 1.3: Revision of ICP, is an Update Needed?

Background

From the Cataloguing Section's Strategic Plan

Section 1.3: Modify the Statement of International Cataloguing Principles (ICP) as necessary for today's rapidly evolving environment based on regular evaluation of the principles. The first review is scheduled for 2014 or sooner as deemed necessary. The first evaluation will take place in 2011/2012 preparing a recommendation for the SC on whether a review is needed or not by the 2012 meetings.

At the 2011 meeting of the Standing Committee, Agnese Galeffi, Dorothy McGarry, and David Reser were given the task of verifying if the 2009 ICP needs revision/updating before the already planned 2014 review.

Recommendations

Revision of ICP, is an update needed?

Yes, the group concluded that a review/revision of ICP is needed.

Is this revision urgent?

The revision is not "pressing" but there are no specific reasons to wait until 2014 ("The first review is scheduled for 2014 or sooner as deemed necessary" Strategic plan 1.3). In fact, there are other items in the Section's strategic plan for the months/years ahead that may benefit from a revised ICP. For example,

- 1.1 "encourage the cataloguing rule makers of the world to follow these principles"
- 1.4 "to look further into the need of separating the specific cataloguing rules from the principles"
- 2.2 "Explore the preparation of a consolidated document for IFLA's FRBR family of conceptual models in an entity-relationship formulation."
- 3 Continue ISBD revisions

What should come first, the ICP revision, or future work on all of these projects?

We think it would be better to work on the principles soon, to help with other Standing Committee tasks. Presumably the principles would be useful in developing any cataloguing code (just as the *Principles Underlying Subject Heading Languages* are meant to be useful for any subject heading language), regardless of what group undertook the development—national, regional, etc.

Rationale

The group suggests the following reasons and concerns that have been raised for considering the review of ICP before 2014:

1. ICP states “It includes not only principles and objectives (i.e., functions of the catalogue), but also guiding rules that should be included in cataloguing codes internationally, as well as guidance on search and retrieval capabilities.” Concern has been expressed that the scope of the document is currently broader than its title implies. It may be possible to revise ICP to resolve this (for example, to separate the principles, rules, functions, search capabilities into different documents), or to change the title of this document to better reflect its contents. Thus, a review of ICP might also result in a clearer statement of its goals and objectives. We recognize that the current text of ICP necessarily represents compromise wording as a result of the development/revision process that produced it.
2. ICP user tasks (4.1-4.5) do not include the user tasks mentioned in FRAD (adding “contextualize” and “justify”), or FRSAD (adds "explore"). A review/revision of ICP might result in adding these tasks to the “Objectives and Functions of the Catalogue,” and may have some impact on the “General Principles” section as well.
3. A review/revision of ICP may result in a more significant mention of controlled vocabularies for attributes, and more emphasis on identifiers for terms in value vocabularies, and for entities. These concepts may, if considered important, be developed as additional principles in ICP, or noted in other sections of the document.
4. Consider whether the ‘internationally agreed standard’ for descriptive data mentioned in 5.3 should more clearly reference the *International Standard Bibliographic Description* (only mentioned in a footnote now).
5. While there is recognition that ICP gives preference for choosing language and script of authorized access points “found on manifestations” (ICP 6.3.2), the expanded scope of ICP beyond library communities may require some additional words for the types of resources where forms of names may not be found on manifestations themselves (e.g., art objects, some archival resources).

Respectfully submitted by:

Agnese Galeffi, Dorothy McGarry, David Reser
August 2012

APPENDIX IV: Expansion of the ICP to form an international cataloguing code?

Expansion of the International Cataloguing principles (ICP) to form international cataloguing code? Discussion paper.

Goal 1.4 in the Strategic plan of the IFLA Cataloguing Section 2011/2013 states that the section shall “be prepared to form a working group, in collaboration with other relevant sections, to look further into the need of separating the specific cataloguing rules [in the ICP] from the principles and explore the need to expand the statement further towards becoming an international cataloguing code.”

It is added that the pros and cons of working towards an international cataloguing code within IFLA will be discussed at the SC meetings in 2012.

This document is meant as a starting point for this discussion.

Should IFLA develop an international cataloguing code based on the ICP principles?

Pro

Internationalization: Within IFLA we have an international representation and tradition of developing cataloguing standards and conceptual models - The IFLA Cataloguing Section is the logical place for such international cooperation. Examples: The ICP is truly international. It has been discussed and approved in a world-wide process beyond comparison. The extensive use of ISBD around the world also shows that it is possible to reach international results.

Con

Resources: To develop a cataloguing code is very labour-intensive and costly, and the work within IFLA sections is mainly voluntary. Will IFLA be able to provide the resources to develop and maintain the needed administration of an international cataloguing code? We have seen in the case of RDA the cost in time and resources it takes to create an international cataloguing code for the 21st century.

Time factor: Given the fact that the agreement on the ICP took 6 years from the first drafts in 2003 until the publication in 2009, the development of a complete cataloguing code would take even more time. However, the web development is much faster and the most important point for libraries is to get connected to and keep up with these developments instead of looking for library specific solutions.

Timing: When it comes to description ISBD is the international code either in itself or incorporated in other codes. As a complete code (i.e., including access points), AACR2 must be regarded as the most widely used cataloguing code internationally. RDA promises to be even more widely used and already includes important aspects for libraries getting connected to the web developments. Many members of the cataloguing section have contributed to the

development of RDA, by responding to worldwide reviews, by participating in tests, etc. Many have already decided to implement RDA as a cataloguing code.

Alternatives

Even if the Cataloguing Section's SC decides not to develop a cataloguing code based on ICP and FRBR, we will continue actively to take a leadership and partnership role in international cataloguing work. Our contribution will then not be by developing another cataloguing code, but on the fundamental level by being responsible for the underlying structure and maintaining the essential underlying foundations and watching for trends and future developments in metadata use and re-use in the international context.

The SC also has the opportunity to expand its connections with RDA and to influence its continued development. For example, RDA is firmly based on the principles from ICP and the conceptual models from the FR family, which are developed and maintained by the IFLA Cataloguing Section FRBR Review Group, as well as the basic elements for descriptive cataloguing from the ISBD, which is maintained by the IFLA Cataloguing Section ISBD Review Group. Alignment and harmonization work such as the joint meetings between ISBD RG and Joint Steering Committee (JSC) for Development of RDA as well as between the FRBR RG and the JSC are an important part of establishing Cataloguing Section standards as building blocks for other agencies to use in their work. Additionally, the membership for the JSC is evolving to be truly international, so this is an opportunity for IFLA to have an even greater role in the development of RDA, perhaps negotiating an even greater role to assist in the future maintenance and development of that international code.

Different kinds of partnerships with other institutions, groups and rulemaking bodies could also be a way to keep our work and contributions relevant to the international development.

APPENDIX V: Report from ALA CC:DA, ALA Midwinter Conference 2012

Report from the American Library Association's Committee on Cataloging: Description and Access, ALA Midwinter Conference, Dallas, Texas, USA, 2012 January 21 and 23.

The American Library Association's Committee on Cataloging: Description and Access (CC:DA) met at the ALA Midwinter Conference in Dallas, Texas, on Saturday 2012 January 21, 1:30-5:30 P.M.; and Monday 2012 January 23, 8:00 a.m.-12:00 noon.

CC:DA Chair Ms. Lori Robare (University of Oregon) reported on motions and other actions taken by CC:DA between June and December 2011 (<http://www.libraries.psu.edu/tas/jca/ccda/docs/chair58.pdf>).

Library of Congress Representative Ms. Barbara Tillett reported on activities and news from LC (<http://www.libraries.psu.edu/tas/jca/ccda/docs/lc1201.pdf>). Among many other things, she called attention to the Bibliographic Framework Transition Initiative, which issued a high-level plan outlining its devotion to linked data technology and the Semantic Web (<http://www.loc.gov/marc/transition/>), and to the addition of uniform titles to the Virtual International Authority File (VIAF; <http://viaf.org/>).

Mr. John Attig (Pennsylvania State University) reported on the November 2011 meeting of the Joint Steering Committee (JSC) in Glasgow, Scotland (<http://www.libraries.psu.edu/tas/jca/ccda/docs/jsc1111.pdf>). The Deutsche Nationalbibliothek has joined the JSC, with Ms. Christine Frodl as its representative. Ms. Tillett is the new JSC Chair, with Ms. Judy Kuhagen (recently retired from LC) as JSC Secretary; Mr. Kevin Marsh replaces Ms. Deirdre Kiorgaard as representative of the Australian Committee on Cataloging (ACOC); Mr. Alan Danskin remains as British Library representative. The JSC met with the ISBD Review Group and representatives of the ISSN Network to harmonize interoperability among the three standards, especially regarding such issues as when to create a new record, mapping between ISBD and RDA, and input standards. Ms. Chris Oliver (McGill University) is working on the rewording of RDA Chapters 9, 10, 11, 6, and 17 into clearer English, with a goal of submitting these to ALA Publishing in June 2012. The JSC will establish a new RDA Examples Group to maintain existing examples within the RDA text as well as full examples; this group will coordinate with the existing Program for Cooperative Cataloging (PCC) examples group. In addition to the formal means of making substantive revisions to RDA, the JSC wants to establish a more informal, fast-track mechanism for dealing with simple errors, changes to the glossary, corrections to examples, and the like.

Among the RDA proposals and issues discussed:

- Revision of RDA 6.21 (Other distinguishing characteristics of a legal work) and 6.29.1.33 (Additions to access points representing treaties, etc.) (<http://www.libraries.psu.edu/tas/jca/ccda/docs/jsc1112a.pdf>): Addressing the need to differentiate treaties signed on the same day. Approved with changes pending.
- Descriptions of relationships (RDA section 8) (<http://www.libraries.psu.edu/tas/jca/ccda/docs/jsc1112b.pdf>): RDA needs better

instructions on how to record a structured description of a relationship, particularly regarding contents notes and the description of accompanying material.

- Revision of RDA 16.2.2.9: Places in certain federations (Revised) (<http://www.libraries.psu.edu/tas/jca/ccda/docs/aall3rev.pdf>): The treatment of historical jurisdictions, overseas territories, and islands was discussed and the result should be a final proposal in the future.
- CC:DA Task Force on RDA Instructions for Governmental and Non-Governmental Corporate Bodies, Discussion Paper (<http://www.libraries.psu.edu/tas/jca/ccda/docs/tfgov-3.pdf>): The task force continues its work on rationalizing the RDA treatment of all corporate bodies, considering differentiation and representation, parentage and collocation, names that include the entire name of the higher or related body, and other issues.
- RDA rules revision proposal for Sacred Scriptures, particularly with respect to the Bible, its parts, and apocryphal books (<http://www.libraries.psu.edu/tas/jca/ccda/docs/atla2011-1.pdf>): Discussion focused on the proposals to remove “Apocrypha” as an element intervening between “Bible” and individual book titles in preferred titles and to treat parts of the Bible and parts of the Qur’an as exceptions to a revised general rule on parts of other sacred scriptures. Discussion will continue.
- Task Force on Machine-Actionable Data Elements in RDA Chapter 3: The task force hopes to have a discussion paper on making the description of carriers more machine-actionable ready for ALA Annual in June 2012.
- Task Force on Sources of Information: The task force is trying to find a more principled way for the RDA instructions on sources of information to work more satisfactorily for such resources as sound recordings and moving images. They hope to have a proposal ready for ALA Annual in June 2012.

Mr. John Myers (Union College) reported on MARBI actions during the conference.

- Proposal 2012-01: New Data Elements in the MARC 21 Bibliographic and Authority Formats for Medium of Performance (<http://www.loc.gov/marc/marbi/2012/2012-01.html>): Existing field 382 was expanded to accommodate data required by RDA Chapter 6 and the medium of performance thesaurus that is under development.
- Discussion Paper 2012-DP01: Identifying Titles Related to the Entity Represented by the Authority Record in the MARC 21 Authority Format (<http://www.loc.gov/marc/marbi/2012/2012-dp01.html>): Discusses the possible creation of a new 67X authority field to identify titles related to the entity identified by the authority record (such as “also author of” or “not author of”). This will likely return as a proposal at ALA Annual in June 2012.
- Identities and roles of MARBI and the MARC Advisory Committee: MARBI is the ALA committee with three representatives each from ALCTS, LITA, and RUSA. The MARC Advisory Committee consists of both ALA and non-ALA representatives and is intended to advise LC. The two entities have long been confused because they have always met together. The Bibliographic Framework Transition Initiative prompts both

entities to determine their future roles and may inspire the creation of a task group to sort things out.

The RDA Programming Task Force is planning on a one-day preconference at ALA Annual in June 2012 on RDA changes to authority records.

Revisions are underway to the CC:DA Procedures document (<http://www.libraries.psu.edu/tas/jca/ccda/docs/procedur2011.pdf>), to “How to Submit a Rule Change Proposal to CC:DA” (<http://www.libraries.psu.edu/tas/jca/ccda/docs/tf-updaterule3.pdf>), and to the CC:DA Web site (<http://www.libraries.psu.edu/tas/jca/ccda/docs/redesign.ppt>).

Respectfully submitted by
Jay Weitz, OCLC
IFLA Cataloguing Section Liaison to ALA CC:DA
2012 March 2

APPENDIX VI: Report from ALA CC:DA, ALA Annual Conference 2012

Report from the American Library Association's Committee on Cataloging: Description and Access, ALA Annual Conference, Anaheim, California, USA, 2012 June 23 and 25.

The American Library Association's Committee on Cataloging: Description and Access (CC:DA) met at the ALA Annual Conference in Anaheim, California, on Saturday 2012 June 23, 1:30-5:30 P.M.; and Monday 2012 June 25, 8:00 a.m.-12:00 noon.

CC:DA Chair Ms. Lori Robare (University of Oregon) reported on motions and other actions taken by CC:DA between December 2011 and June 2012 (<http://www.libraries.psu.edu/tas/jca/ccda/docs/chair59.pdf>). The new CC:DA Chair will be Mr. Peter Rolla (Harvard University).

Library of Congress (LC) Representative Ms. Barbara Tillett reported on activities and news from LC (<http://www.libraries.psu.edu/tas/jca/ccda/docs/lc1206.pdf>). Some of the highlights of her report:

- LC has contracted with Zepheira to help accelerate the launch of the Bibliographic Framework Initiative, the effort to migrate from MARC to a Linked Data (LD) model. Details can be found on the Bibliographic Framework Transition Initiative Web site at <http://www.loc.gov/marc/transition/>.
- The Program for Cooperative Cataloging (PCC) has made available "RDA in NACO Training" videos designed for Name Authorities Cooperative Program (NACO) authorities catalogers, at http://www.loc.gov/catworkshop/courses/rda_naco/.
- "Library of Congress Policy Statements" (LCPS), the RDA equivalents of "Library of Congress Rule Interpretations" (LCRIs) will be renamed as "LC-PCC Policy Statements" in the *RDA Toolkit* later in 2012.
- Because Pinyin Romanization has gradually become more accepted in Taiwan and been adopted by the U.S. Board of Geographic Names in 2010, Pinyin will now be used for Taiwanese geographic names and subject headings.
- No earlier than August 2012, the LC Policy and Standards Division (PSD) will begin an experiment to add subject category codes in Authority field 072 in records for subject headings. This should increase the usability of LCSH on the Semantic Web. For more information, see http://www.loc.gov/catdir/cpsd/field_072_announcement.pdf.
- Progress continues on the development of the LC Genre/Form Terms for Library and Archival Materials (LCGFT) moving image, cartography, religion, literature, and music projects.

The ALA Representative to the Joint Steering Committee (JSC) Mr. John Attig (Pennsylvania State University) reported (<http://www.libraries.psu.edu/tas/jca/ccda/docs/jsc1206.pdf>) on four major points:

- Ms. Chris Oliver (McGill University) continues rewording RDA Chapters 9, 10, 11, 6, and 17 into clearer English. It was determined that Chapter 17 would have only limited use in a MARC environment, but the reworded Chapters 9, 10, 11, and 6 would be released in the *RDA Toolkit* by December 2012.
- Compiling definitions of terms in the RDA vocabularies and data sets is underway, is expected to be approved by the JSC in July 2012, and should be released later in the year.
- Work on correcting the RDA text via the fast track process, including some new relationship designators, is underway.
- The deadline for proposals to be submitted to the JSC for its 2012 November 6-9 meeting in Chicago is 2012 August 8. Only those approved by the JSC at this meeting will be included in RDA before the scheduled implementation in March 2013.

Reports were delivered from the following task forces:

- Machine-Actionable Data Elements in RDA Chapter 3: The discussion paper on making the description of carriers more machine-actionable (<http://www.libraries.psu.edu/tas/jca/ccda/docs/tf-MRData3.pdf>) will go forward to the JSC for comments from other constituencies after being made more explicit in its recommendations.
- Revise *Building International Descriptive Cataloging Standards*: The text (<http://www.libraries.psu.edu/tas/jca/ccda/docs/tf-revise3.pdf>) was approved with a few minor alterations and the task force was disbanded.
- RDA Instructions for Governmental and Non-Governmental Corporate Bodies: The report (<http://www.libraries.psu.edu/tas/jca/ccda/docs/tfgov-4.pdf>) was approved, pending some editorial work to assist the JSC in its deliberations. All examples will be reviewed and a clearer statement of the impact of the changes will be added to the introduction.
- Relationship Designators in RDA Appendix K: The report (<http://www.libraries.psu.edu/tas/jca/ccda/docs/tf-appK3.pdf>) was discussed in great detail, including the use of prepositions where they are needed and their omission when not, the clear labeling of reciprocal designators, addition of broader/narrower indications, and the need for a single list of terms. Other constituencies will be able to add designators in the future.
- Investigate Changes Affecting RDA in the Chicago Manual of Style, 16th edition: Most of the findings in the report (<http://www.libraries.psu.edu/tas/jca/ccda/docs/tfchicago3.pdf>) have to do with capitalization and can therefore be fast-tracked. The report, which is still open for comments, will be submitted for ALA Midwinter in January 2013.
- RDA Conference Forums and Programs: For ALA Midwinter, the task force has proposed a single-day preconference “RDA: Back to the Basics,” which has been tentatively approved. They also expect to plan an RDA stories and strategies session for Midwinter. Having sponsored some 29 RDA sessions since 2009, the task force will disband after ALA Annual 2013.
- RDA Planning and Training: Fifteen of the Webinars already presented are more than six months old and are now available for free. Four more have been presented and

will become free in coming months. Among those planned for later in 2013 are: “RDA Elements in MARC 21,” “RDA Name Authority Elements,” “RDA in 10 Easy Steps,” and “RDA for Technical Services Staff: What’s In It For You.” The task force report, with links to all existing Webinars, is available at <http://www.libraries.psu.edu/tas/jca/ccda/docs/RDATraining1206.pdf>.

- Sources of Information: The progress report of this task force (<http://www.libraries.psu.edu/tas/jca/ccda/docs/tf-sourcesofinfo3.pdf>) consisted largely of five appendices, each of which dealt with different aspects of the problem. The fifth (Appendix E: Draft Proposal for Addition to RDA 2.3.2.9 (Resource Lacking a Collective Title)) was an alternative solution obviated by consideration of the remaining appendices.
 - Appendix A: Proposal to Clarify the Status of Containers: This was approved with minor editorial revisions.
 - Appendix B: Draft Proposal for Revision of RDA 2.1.2.2 (Resource Issued as a Single Unit): CC:DA affirmed that the task force’s approach was acceptable, preferring a source that bears a collective title or a source that bears the title of the predominant work. There will also be adjustments needed earlier in RDA Chapter 2 for what is considered to be “accompanying material.”
 - Appendix C: Draft Proposal for Revision of RDA 2.1.2.3 (Resource Issued in More Than One Part): CC:DA affirmed that the task force was on track in trying to create mutually exclusive categories, with some additional work needed in regard to serials.
 - Appendix D: Draft Proposal for Revision of RDA 2.2.2.2–2.2.2.4 (Principally for Dealing with Embedded Metadata): CC:DA affirmed that the task force’s approach was good, favoring eye-readable and more obvious data over embedded metadata and making embedded metadata the final resort for the source of information. The task force will continue work on this proposal.

In her work on the task force, Kelley McGrath (University of Oregon) created flowcharts documenting the choice of the source of information that will be added both to the proposal and to the *RDA Toolkit*.

Five revision proposals were discussed:

- American Association of Law Libraries (AALL): Revision of RDA 16.2.2.9: Places in Certain Federations (<http://www.libraries.psu.edu/tas/jca/ccda/docs/aall3.pdf>); and Council on East Asian Libraries (CEAL): Recording Chinese Place Names in RDA 16.2.2 (<http://www.libraries.psu.edu/tas/jca/ccda/docs/ceal2012-1.pdf>) were closely related and discussed jointly. Use of the largest jurisdiction as a qualifier with the option of including an intervening jurisdiction, a generalization of the CEAL proposal, will be moving forward as a short-term solution. The exceptions for Australia, Canada, United States, etc. will be retained. The Republic of Ireland will be removed from the “British Isles” rule and other corresponding rewording will be done.
- Music Library Association: Revision of RDA Instructions for Librettos (RDA 6.27.1.2, 6.27.4.2, and 6.28.1.2.) (<http://www.libraries.psu.edu/tas/jca/ccda/docs/mla2012-4.pdf>) had not been formally included on the agenda, so discussion and a straw vote were deferred to after ALA on the wiki. MLA proposes that RDA 6.27.4.2 be modified so that, when the composer

and librettist are the same person, the authorized access point for the libretto and the variant access point for the libretto are not practically identical except for punctuation.

- Online Audiovisual Catalogers (OLAC): Revision of RDA 3.19.3 for Video Encoding Formats and Introduction of New Instruction for Optical Disc Characteristics (<http://www.libraries.psu.edu/tas/jca/ccda/docs/olac2012-1.pdf>) was accepted, pending some editorial revisions. It documents definitions of “optical disc storage format” (such as Blu-ray, CD, and DVD) and “optical disc recording type” (differentiating between mass produced “replicated discs” and locally produced or on-demand “recordable discs”).
- Hearings in 19.2.1.1.1, from Adam Schiff (University of Washington), proposed two options to avoid the major change in practice that made hearings into named corporate bodies. The second option of making a new category of corporate bodies considered to be creators was preferred by CC:DA. Work on the proposal will continue in that direction.

Mr. John Myers (Union College) reported on MARBI actions during the conference:

- Following ALA Annual 2013, MARBI will be dissolved and replaced by a Metadata Standards Committee, which sounds like an almost identical joint ALCTS/LITA/RUSA committee with a just slightly updated charge. The MARC Advisory Committee will continue as before. MARC 21 updates will be issued twice a year.
- Proposal No. 2012-02: Identifying Titles Related to the Entity Represented by the Authority Record (<http://www.loc.gov/marc/marbi/2012/2012-02.html>): This proposal will return at Midwinter revised to reflect the preferred simplified title coding.
- Proposal No. 2012-03: Data provenance in the MARC 21 Bibliographic Format (<http://www.loc.gov/marc/marbi/2012/2012-03.html>): Option 2, creating new Data Provenance field 883, was approved with the suggestion that it be added to the Authority and Classification formats as well. It was believed that this more generalized option would allow an easier transition to any post-MARC data framework, which would be expected to account for this kind of metadata provenance as a matter of course.
- Proposal No. 2012-04: New data elements in the MARC 21 Authority Format for *Other Designation Associated with the Person* and *Title of the Person* (<http://www.loc.gov/marc/marbi/2012/2012-04.html>): Option 2, broadening the definition of subfield \$c and defining subfield \$d, Title of the Person was accepted. Subfields \$s (Start Period) and \$t (End Period) were also added.
- Proposal No. 2012-05: Making the 250 Field Repeatable in the MARC 21 Bibliographic Format (<http://www.loc.gov/marc/marbi/2012/2012-05.html>): This proposal was rejected and sent back for further work by the Music Library Association.
- Proposal No. 2012-06: Defining Subfield \$c (Qualifying information) in Field 028 (Publisher Number) in the MARC 21 Bibliographic Format (<http://www.loc.gov/marc/marbi/2012/2012-06.html>): Passed with minor changes.

- Proposal No. 2012-07: Defining New Code for Vocal Score in Field 008/20 (Format of music) in the MARC 21 Bibliographic Format (<http://www.loc.gov/marc/marbi/2012/2012-07.html>): Passed.
- Discussion Paper No. 2012-DP02: Authority Records for Medium of Performance Vocabulary for Music (<http://www.loc.gov/marc/marbi/2012/2012-dp02.html>): A new 16X set of fields will be proposed.
- Discussion Paper No. 2012-DP03: Chronological Aspects in the MARC 21 Bibliographic and Authority Formats (<http://www.loc.gov/marc/marbi/2012/2012-dp03.html>): Options will be left open, pending the development of best practices in various communities.
- Discussion Paper No. 2012-DP04: Recording Audience Characteristics of Works and Expressions in the MARC 21 Bibliographic and Authority Formats (<http://www.loc.gov/marc/marbi/2012/2012-dp04.html>): Discussions leaned toward the use of the 3XX block, against the use of a closed vocabulary, and toward making the existing 008/22 for Target Audience obsolete.
- Discussion Paper No. 2012-DP05: Recording Creator/Contributor Group Categorizations of Works, Expressions, and Persons in the MARC 21 Bibliographic and Authority Formats (<http://www.loc.gov/marc/marbi/2012/2012-dp05.html>): The 3XX block was thought to be preferable for geographic, language, and nationality aspects.

Program for Cooperative Cataloging (PCC) liaison Ms. Kathy Glennan (University of Maryland) reported (<http://www.libraries.psu.edu/tas/jca/ccda/docs/pcc201206.pdf>):

- NACO Authority record conversion will be in two phases and should be completed by RDA Day One in March 2013: (1) Identifying in 667 field those that need changes, requiring review; (2) Making RDA changes to access fields. Those records needing no RDA changes will not be recoded.
- BIBCO Standard Record (BSR) for Textual Monographs is serving as the basis for other format BSRs and should result in a combined BSR before the end of 2012.
- A single Provider-Neutral Record document for RDA for all formats is in progress.

Mr. Troy Linker of ALA Publishing Services reported that *RDA Toolkit* renewal rates have been lower than hoped and would need to triple or quadruple to reach a break-even point. A new RDA accumulation for December 2012 (both print and *Toolkit*) will include all reworded chapters available at that time (Chapters 2, 6, 9, 10, and 11) plus the April 2012 Update. June 2013 is the expected timing of the 2013 Update and then annually at midyear. French and German translations of RDA have been prepared and plans are underway to make them available.

CC:DA Webmaster Melanie Polutta (LC) reported on the upcoming revisions to the CC:DA Web site.

Respectfully submitted by
Jay Weitz, WorldCat Quality Management Division, OCLC
IFLA Cataloguing Section Liaison to ALA CC:DA
2012 July 9

APPENDIX VII: Financial statement 2012

Final result of the year 2011

	Admin	Consolidation of conceptual models	IFLA ISBD Review Group and JSC for development of RDA. Meeting on alignment and interoperability of standards	ISBD/XML Schema	Total
Allotment, 1 Jan. 2011	700	3 000	3 000	2 700	9 400
Expenditures to 31. Dec. 2011	616,64 ^a	3 059,68 ^b	2 939,4 ^c	3 002,31 ^d	9 618,03
Balance, 31 Dec. 2011	83,36	-59,68	60,6	-302,31^e	-218,03^f

Notes:

- All amounts in Euros (EUR).
 - IFLA allots new funds at beginning of each year. **Balances returned to IFLA at end of year.**
- a) Meeting room rental, FRBR RG (August 19th 2011, Puerto Rico), EUR 472. CRM/FRBR Harmonization meeting in Athens, EUR 144,64 (Riva).
- b) Meeting in Heraklion as part of the Consolidation of Conceptual Models project, EUR 2 012,79 (EUR 287,90 Zumer, EUR 728,69 Dunsire, EUR 996,20 Riva).
Meeting in Amsterdam November 2011, EUR 1 046,89 (EUR 821 Dunsire, EUR 225,89 Zumer).
- c) Meeting in Glasgow November 2011, EUR 2 939,40 (EUR 706,84 Escolano, EUR 423,34 Gentili-Tedeschi, EUR 744,51 Leresche, EUR 530 McGarry, EUR 534,71 Willer).
- d) Meeting in Edinburg February 2011, EUR 49,25 (Willer). Attendance at meetings in Puerto Rico during IFLA WLIC 2011, EUR 2 203,77 (Dunsire). MMA, development of OMR for ISBD, EUR 450. Meeting and workshops in Zagreb, 21 November 2011, EUR 299,29 (Dunsire).
- e) The expenditures exceed the allotment. Authorized by the PC at their December meeting.
- f) See e) above.

Projected cash flow 2012

	Admin	Consolidation of conceptual models (D3.5.13-2.11)	Development of IFLA namespaces for bibliographic standards (E3.13.4-1/12)	Total
Allotment, 1 Jan. 2012	400	6 000	2 000	8 400
Expenditures to 31. July 2012	0	4 400 ^a	1 557 ^b	4 400
Projected exp. July-Dec. 2012	400	1 600	443	4 000
Balance, 31 Dec. 2012	0	0	0	0

Notes:

- All amounts in Euros (EUR)
 - IFLA allots new funds at beginning of each year. **Balances returned to IFLA at end of year.**
- a) Namespaces dereferencing EUR 200. FRBR RG meeting in London in April, EUR 3 018,17 (EUR 101 Dunsire, EUR 921,22 Riva, EUR 578,25 Willer, EUR 213,94 + EUR 1 203,76 Zumer). CRM meeting Heraklion EUR 355,91 (Riva). Other costs for April-May meetings EUR 825,98 (Riva).
- b) Attendance at Libraries in the Digital Age (LIDA) conference and ISBD/XML Study Group meeting, Zadar, Croatia, 18-21 June 2012, GBP 519,51 (Dunsire), Attendance at WLIC, Helsinki, Finland, 11-17 Aug 2012, GBP 691,89 (Dunsire). GBP 1 211,40 -> EUR 1 557.

Budget proposal 2013

	Admin	Consolidation of conceptual models ^a	Development of IFLA namespaces for bibliographic standards ^b	Interoperability of ISBD within Linked Data environment ^c	Revision ICP?	Total
Expenditures 2013	400?	4000-6000	2000	6000	???	???
Balance, 31 Dec. 2013						

Notes:

- All amounts in Euros (EUR).
 - IFLA allots new funds at beginning of each year. **Balances returned to IFLA at end of year.**
- a) The FRBR RG will apply for funding of a 2-year project, that continues the consolidation work. The estimated sum for the first year is between EUR 4000 and 6000.
- b) From 2013 the Namespaces group will probably report to the Committee on Standards, and their expenses therefore not be a part of the CATS budget.
- c) Work with NBA Application Profile, RDA/ISBD alignment, ISBD Application Profile, Guidelines for use of ISBD as Linked Data, and other research needed for the work on the revision of the ISBD as the

Semantic Web compliant standard, e.g., ISBD/FRBR alignment, ISBD/UNIMARC alignment, ISBD/ROF (RDA/ONIX Framework) alignment, ISBD/ISSN/IAML updating, ISBD translations and ISBD as the bases for development of national cataloguing rules, etc. The projected expenditure would be planned for at least two face-to-face meetings, and attending conferences with presentation of ISBD in RDF and alignments, specifically aiming at contact with rule making bodies, and liaison with other communities such as DCMI, W3C, ISO, etc.

APPENDIX VIII: Update on Helsinki meetings: ISBD RG

DRAFT MINUTES

Meetings:

Monday, 13 August 12:30-14:30 (Room 207)
Wednesday, 15 August 11:30-13:30 (Room 306)

Attendees: Anders Cato (member and Division III representative to Committee on Standards), Elena Escolano Rodríguez (corresponding member), Agnese Galeffi, Massimo Gentili-Tedeschi (member and IAML representative), Tuula Haapamäki, John Hostage, Natalia Kasparova, Irena Kavčič, Françoise Leresche (member and ISBD/XML Study Group, chair), Dorothy McGarry, Glenn Patton, Mirna Willer (chair)

Attendee representatives of other bodies and groups: Maria Inês Cordeiro (UNIMARC Core Activity, director), Gordon Dunsire (Namespaces Task Group, chair and consultant to ISBD/XML SG), Christine Frodl (JSC/RDA liaison), Hanne Hørh Hansen (Cataloguing Section, chair), Alan Hopkinson (Permanent UNIMARC Committee, chair), François-Xavier Pelegrin (ISSN Network representative), Pat Riva (FRBR Review Group, chair)

Apologies: Renate Gömpel (represented by C. Frodl)

Observers: Viktoria Barsukova, Tanja Buzina, Gabriella Contardi, Rosa Maria Galvão, Mauro Guerrini, Karin Kleiber, Eeva Murtomaa, David Reser, Ricardo Santos, Miriam Sästrom, Marja-Liisa Seppälä, Janis Young, Elena Zagorskaja

Note that these minutes do not necessarily reflect the chronological order in which each topic was discussed.

1. Welcome and introductions

M. Willer welcomed the members, representatives of other bodies and groups, and observers. She thanked Agnese Galeffi, CS's information officer, and John Hostage for maintaining RG's website and wiki respectively.

2. Agenda

Item on the agenda *Cataloguing Section's ISBD - Strategic Plan* was moved forward under 4. Agenda was adopted without other changes.

Approval of the Minutes of the ISBD RG meeting held in San Juan, Puerto Rico, August 15 and 18, 2011

Minutes⁸ were adopted without changes.

3. Cataloguing Section's ISBD - Strategic Plan (H. H. Hansen, Cataloguing Section, chair)

After the August meeting in San Juan in 2011 the ISBD RG adopted its Plans for activities⁹ aligned with the Cataloguing Section's Strategic Plan¹⁰, and subsequently proposed a three part project *Interoperability of ISBD within Linked Data Environment*¹¹ for 2012. The project was not funded, and the chair of the Cataloguing Section was asked by the Professional Committee to "develop a strategic plan to address the maintenance and development of ISBD so that the PC has a clear understanding of the priorities, resources, needs and outputs." The Strategic Plan was prepared by H.H. Hansen, M. Sästrom and M. Willer, and adopted by the ISBD RG and CS's Standing Committee before sending it to the PC by 20 July. Following the requirement of the Division III chair, a shortened version was prepared during the IFLA conference and presented to the ISBD RG and CS's Standing Committee. The plan takes into account the Cataloguing Section's revised action plan for 2013 adopted at its 2012 meeting: (1) consolidation of FR family of models, (2) alignment and interoperability of namespaces of ISBD, FRBR, FRAD and FRSAD, (3) ICP: International Cataloguing Principles – review. Furthermore, the plan is defined in the framework of the preparation of the documentation for the revision process of the ISBD, to take place in four years time after the publication of the ISBD (2011-2015). With this in mind, the plan proposes as a priority for 2012 (if funding would be secured) to finish the work on the *ISBD/RDA profile: mandatory level element set mapping* (working title), the action that resulted from the Outcomes of the ISBD Review Group and ISSN Network with the JSC for Development of RDA harmonization meeting, Glasgow, UK, November 3-4, 2011,¹² the project funded in 2011, Project no. D3.4.13-1/11 *IFLA ISBD RG and JSC/RDA meeting on alignment and interoperability of standards* (referred to in these minutes as Glasgow meeting or Outcomes).

The Strategic plan was approved in principle by the ISBD RG, approved by the CS, and sent to the PC on 15 August 2012.

Action 1: M. Willer to send the ISBD Strategic Plan for further comments and final approval to the ISBD RG members.

Action 2: ISBD RG to propose its representative to the Cataloguing Section's ICP Review Task Group: the representative is Tuula Haapamäki

Matters arising from the Minutes of the San Juan meeting

3.1. ISBD/XML Study Group report¹³ (F. Leresche, chair)

F. Leresche reported on the SG's activities, and pointed out specifically the following:

- 3.1.1. Namespaces for the Consolidated ISBD in OMR (Open Metadata Registry)¹⁴ were published, and a full de-referencing service implemented. Further information is available on the IFLA website.¹⁵

⁸ http://www.ifla.org/files/cataloguing/isbdrg/meeting_2011.pdf

⁹ See Objectives on ISBD RG's website at: <http://www.ifla.org/about-the-isbd-review-group>, and Mirna Willer; Françoise Leresche. News from the ISBD Review Group: Plans for Activities: 2011-2013 & Activities since August 2011. In: SCATNews 36(December 2011), <http://www.ifla.org/files/cataloguing/scatn/scat-news-36.pdf>

¹⁰ <http://www.ifla.org/en/node/1959>

¹¹ <http://www.ifla.org/en/node/6172>

¹² http://www.ifla.org/files/cataloguing/isbdrg/JSC_ISBD_ISSN_Outcomesfinal.pdf

¹³ http://www.ifla.org/files/cataloguing/isbdrg/isbd-xml-activities_2011-2012.pdf

3.1.2. *Mapping of ISBD area 0 vocabularies to RDA/ONIX Framework vocabularies, version 1, 4 April 2012*

The *Mapping* was revised and finished as [Action 23](#) of the Glasgow Outcomes. The document was sent to the JSC/RDA for its information on 30 July 2012. The second stage of this action, i.e., the implementation of the namespaces mapping, has to wait for the JSC/RDA to publish the RDA/ONIX Framework namespace.

ISBD RG did not have any additional comments, so this version of the document was approved.

Action 3: M. Willer to send the document to the CS's Standing Committee for final approval; publish the document on the ISBD RG's website.

Action 4 on the ISBD/XML SG: Follow up developments regarding publication of the RDA/ONIX Framework namespace, and start the implementation of the ISBD/ROF namespaces mapping as appropriate.

3.1.3. Guidelines on the translation of ISBD namespace

Guidelines were developed into a more general one including the FR family of models in collaboration with the Namespaces Task Group. It was therefore passed on to that group for further development and maintenance. ISBD RG received the text *Translations of RDF representations of IFLA standards, version 1, 9 April 2012* for comments: no comments were received. G. Dunsire reported on the Namespaces TG's decision to revise this version with the emphasis on the translation issues, and with the aim to update it with examples from translations of various standards namespaces as they will be published. It was also recognized that there could be a need to develop specialized translation guidelines for ISBD. It was also recognized that *Guidelines for use of ISBD as Linked Data*, proposed as a project for 2012, still seems to be needed as a separate document from the translation guidelines.

Action 5 on the ISBD/XML SG: Consider developing specialized translation guidelines for ISBD namespaces.

Action 6: Plan work on *Guidelines for use of ISBD as Linked Data* for 2013-2014.

3.1.4. Development of mapping between ISBD and FRBR namespaces

The ISBD/XML SG recognized that the relationship between class Resource (ISBD) and classes WEMI (FRBR) is an urgent issue that should be investigated further and specified.

Action 7: Write *Resource vs WEMI entity resolution: discussion paper*. Priority action for 2013.

3.1.5. ISBD Application Profile

The work on the ISBD AP was left pending, as it depends on DCMI's progress on this issue.

Action 8 on the ISBD/XML SG: Develop the ISBD AP as conditions will be met.

3.1.6. Ad hoc meetings and presentations: see the chair's full report.

¹⁴ <http://metadataregistry.org/>

¹⁵ <http://www.ifla.org/en/news/isbd-namespaces-published>

List of presentations at conferences, workshops, etc. is updated on the ISBD/XML SG's website. Members of the ISBD RG were invited to contribute to it with bibliographic references of their work, or publications related to these issues.

Issues raised at the ISBD RG with ISBD/XML SG and Namespaces Task Group ad hoc meeting, Zadar, 17, 18 and 21 June, 2012¹⁶ have important impact on the further revision of the ISBD, such as issues regarding ISBD aggregate statements (areas) and granularity of notes, as well as the ISBD elements and rules as it was recognized that ISBD text does not clearly separate elements from rules (III e & f of the Minutes).

Action 9 on the ISBD/XML SG: The ISBD/XML SG will report on any issues relevant to the ISBD revision process.

3.1.7. Perspectives for the ISBD/XML SG and planned activities

F. Leresche reported that with the ISBD namespace being published, and in addition to developing the ISBD AP and maintaining ISBD namespaces, the SG's plan is to turn its activity to creating mappings and alignments with other bibliographic standards, and liaising the ISBD with the Semantic Web community. The name and the position of the SG was discussed, especially in relation to the Namespaces Task Group with its position in relation to the Classification and Indexing Section, of which it is a group, the Cataloguing Section, Division III and the newly established Committee on Standards not resolved during the conference. It was decided, therefore, that the group continues under the present name and with the revised tasks until the next IFLA conference when these issues are expected to be resolved.

It was also noted that some colleagues found it difficult to understand the many mappings/alignments and projects of groups and subgroups and how they interrelate, and that a development of a diagram would be helpful.

Action 10: M. Willer and F. Leresche with help from G. Dunsire to develop a diagram of mappings/alignments and related projects.

Action 11: Volunteers are invited to join the ISBD/XML Study Group.

3.2. Online publication of the ISBD consolidated edition

M. Willer reported that there is no information about IFLA's publishing ISBD online and free of charge. She further said that IFLA had been informed that other communities, such as DCMI are also interested in having the ISBD consolidated text online, and that IFLA should take advantage of this interest in promoting its standards. Some members of the DCMI use the last version of the standard based on the world-wide review version, however that version had significantly been changed in the published one. It was decided that Committee on Standards be informed of this through Cataloguing Section (see below 7.3). There was also a question from the DCMI community on who is using ISBD.

Action 12: J. Hostage will answer the question on the use of ISBD (ISBD is the basis of national cataloguing rules), and inform DCMI colleagues about the *Full ISBD examples: supplement to the consolidated edition of ISBD, August 2011* published online on the RG's website.¹⁷

3.3. Namespaces Task Group report (G. Dunsire, chair)

5.3.1. The status and remit of the Namespaces TG

¹⁶ http://www.ifla.org/files/cataloguing/isbdrg/meeting_201206.pdf

¹⁷ http://www.ifla.org/files/cataloguing/isbd/isbd-examples_2011.pdf

G. Dunsire reported on the present status of the Namespaces TG, specifically in the organizational structure of the divisions and sections, which, in turn, begs the question of its function and financial support in keeping up the maintenance of standards namespaces, and their mappings.

5.3.2. *Translations of RDF representations of IFLA standards, version 1, 9 April 2012*

G. Dunsire pointed out that some translations of Area 0 vocabularies namespaces were done (Spanish and partly Croatian), and that during the IFLA conference an Italian update was put in the OMR based on the newly published online edition of the Italian translation of the ISBD consolidated edition (August 2012). G. Dunsire reported on TG's decision to update *Translations of RDF representations of IFLA standards, version 1, 9 April 2012*, and also that there could be a need for the ISBD RG to develop specific guidelines for ISBD. This complies with **Action 5** above.

5.3.3. ISBD unconstrained namespaces

G. Dunsire informed the ISBD RG on the discussions within the DCMI community on the unconstrained namespaces that have direct impact on the mappings and alignments of standards and models namespaces. ISBD/XML SG has already discussed this issue, especially in connection to ISBD/RDA and ISBD/FRBR mappings. G. Dunsire pointed out that there could be a need to publish certain ISBD unconstrained namespaces, the task that will be dealt with in cooperation with the ISBD/XML SG. Those interested in this topic are referred to G. Dunsire's discussion paper presented at the Glasgow meeting *Mapping ISBD and RDA element sets*.¹⁸

Action 13 on the ISBD/XML SG: ISBD/XML SG to monitor developments around the need to publish ISBD unconstrained namespaces, and act as needed.

5.3.4. Code for Area 0

G. Dunsire reported on the email he received from the Special Libraries Cataloguing Group and their proposal to define the source code for ISBD Area 0 to be used in MARC 21. It was also decided to register ISBD as a descriptive convention source code.

Action 14: G. Dunsire will answer the email, and help in wording the request to the Library of Congress to register ISBD Area 0 as a Genre/Form Code and Term Source Codes, and ISBD as a Descriptive Convention Source Code; M. Willer will check with the PUC for a need of similar request for UNIMARC.

G. Dunsire drew attention of the ISBD RG to the session organized by the Semantic Web Special Interest Group (SIG) to be held on 15 August 2012 during which the uses of standards representations in W3C/RDF will be reported.

- 3.4. Project no. D3.4.13-1/11 IFLA ISBD RG and JSC/RDA meeting on alignment and interoperability of standards: ISBD Review Group, ISSN Network and JSC for Development of RDA harmonization meeting, Glasgow, UK, November 3-4, 2011: Outcomes report,¹⁹ financial statement report, and action list (M. Willer, chair)

The project was approved for 2011, and the budget (3.000 EUR) was spent to support ISBD RG's representatives to come to the meeting (E. Escolano Rodríguez, M. Gentili-Tedeschi, F. Leresche, D.

¹⁸ <http://www.rda-jsc.org/docs/6JSC-Chair-4.pdf>

¹⁹ http://www.ifla.org/files/cataloguing/isbdrg/ISBD_ISSN_RDA_meeting_%2020111103-04.pdf

McGarry and M. Willer). Following the outcomes of the meeting, a proposal for funding the continuation of the project was made, however, it was rejected. Therefore, only the following was done:

- 3.4.1. Action 6: *National Bibliographic Agency Application Profile* – work in progress (report by E. Escolano Rodríguez, corresponding member, and coordinator of the work)

The ISBD RG meeting, as well as the CS's Standing Committee discussed the name of the document, and pointed out that if it refers to *bibliographic agencies*, the Bibliography Section should be involved in its development. E. Escolano Rodríguez clarified the situation by pointing to the Glasgow Outcomes Action 6: "ISBD RG will submit a proposal to JSC to update Appendix D in line with the current version of the consolidated ISBD. Appendix D will also be developed into an application profile by the addition of guidelines regarding mandatory elements and choice of alternatives and options." It was decided to find a new name for the document that will avoid possible confusion; the document is referred to in the ISBD Strategic Plan under the working title *ISBD/RDA Profile: mandatory level element set mapping*. It was also decided to include into the working group C. Frodl, JSC/RDA liaison, and that the document will be sent to the Bibliography Section for comments (Karin Kleiber, liaison).

The finishing of the document was considered a priority because it is necessary to bring to conclusion the task started under the 2011 project, but also because the revision process of the RDA, which is based on the one-year cycle, would require constant updating of the mapping for which ISBD RG has no spare time nor resources. This document is also considered important as a methodological one to mappings of ISBD with other national cataloguing rules based on it.

Action 15: Finish the *ISBD/RDA profile* document as a priority, and report on any issues relevant to the ISBD revision process.

- 3.4.2. Action 24: *Alignment of the ISBD: International Standard Bibliographic Description element set with RDA: Resource Description & Access element set, Draft version 1, 25 July 2012* (presented by G. Dunsire, in his capacity of consultant to the ISBD RG & ISBD/XML SG)

The *Alignment* document uses not only the definitions of ISBD elements from the edition itself, but also some from the ISBD property definitions as published in the OMR. The latter were approved during the process of publishing the ISBD namespace. However, the process showed the problem that IFLA statements do not easily translate into the technical framework of the RDF representation (additionally on this see Zadar minutes, mentioned above), and that certain definitions were not explicit which caused the problem in exact alignment between elements.

ISBD RG did not have any additional comments, so this version of the document was approved. It was noted that as the document is the high-level alignment, and that the need to develop it further could be expected. JSC/RDA comments would also have impact on the alignment, thus the need for new versions is to be expected. The document was sent to the JSC/RDA on 30 July 2012.

Action 16: M. Willer to send the document to the CS's Standing Committee for final approval, and then publish it on the ISBD RG's website.

- 3.4.3. Action 4: Musical presentation statement (report by Massimo Gentili-Tedeschi, IAML liaison)

M. Gentili-Tedeschi reported on the IAML proposal to the JSC/RDA regarding Area 3 for music presentation.²⁰ No action by the ISBD RG is needed.

3.4.4. Actions re ISSN issues (report by F.-X. Pelegrin, ISSN Network representative)

F.-X. Pelegrin reported on the ISSN Network proposals to the JSC/RDA on the changes of media type²¹, title changes in CJK languages,²² and changes of mode of issuance²³. Comment on the title changes proposal by the ISBD RG is needed.

Action 17: Comment on ISSN Network's title changes in CJK languages proposal.

3.4.5. ISBD RG's Action list and Glasgow Outcomes

ISBD RG's Action list was not specifically dealt with, although a major part of the activities were discussed and resolved. The issues that were not discussed are those that refer to some of the Glasgow Outcomes' actions that were not dealt with due to the lack of time and resources. [The updated Action list is sent separately and is available in the wiki].

M. Willer reported on the ad hoc meeting with representatives of the JSC/RDA, namely Barbara Tillett (JSC/RDA chair), C. Frodl (ISBD RG liaison) and G. Dunsire on 14 August. The ISBD RG was represented by M. Willer (chair), F. Leresche and E. Escolano Rodríguez. B. Tillett informed the ISBD RG about the revision process, and the JSC/RDA meetings schedule in order that ISBD documents meet those. The alignment of RDA with ISBD element sets was discussed, however, M. Willer informed the colleagues that the ISBD RG most probably would not have the resources and time for that work, and that she would appreciate if a constituency of the JSC/RDA would take that action.

Action 18: M. Willer to re-send the ISBD RG's proposals on the ISBD/RDA alignment and ISBD Area 0/ROF mapping to the JSC/RDA on the proposal forms.

Action 19: Review Glasgow Outcomes, and propose actions based on the priorities of the ISBD Strategic Plan for the August 2013 meeting.

Chair's report

3.5. Translations of the ISBD

Reported translations of the ISBD consolidated edition: Bulgarian, Chinese and Italian; reported translations in progress: Croatian, Finish, French, Slovenian, Spanish. Translations on Area 0: Serbian, Spanish, Russian, Chinese (although, the text translated is not the same as in the published edition). Translation of *Guidelines for the application of the ISBDs to the description of component parts*: Bulgarian. Members were asked to report on any known new translation being published or in progress.

3.6. Meetings: August 2011-2012

The Outcomes of the ISBD RG and ISSN Network with JSC/RDA harmonization meeting held in Glasgow was already reported above. M. Willer was invited to take part in the FRBR Review Group

²⁰ <http://www.rda-jsc.org/docs/6JSC-IAML-1.pdf>

²¹ <http://www.rda-jsc.org/docs/6JSC-ISSN-1.pdf>

²² <http://www.rda-jsc.org/docs/6JSC-ISSN-2.pdf>

²³ <http://www.rda-jsc.org/docs/6JSC-ISSN-3.pdf>

meeting, London, April 2012 which dealt with the consolidation of the FR family of models,²⁴ and its meeting in Helsinki, 16 August 2012. The ISBD RG with ISBD/XML SG and Namespaces TG ad hoc meeting, Zadar, June, 2012 has been reported under ISBD/XML SG.

3.7. Presentations and publications²⁵

In spite of the lack of funding, the members of the ISBD RG and ISBD/XML SG gave presentations related to ISBD at the following conferences/seminars:

- AKM: Archives, Libraries, Museums, 15th seminar, November, 2011, Poreč, Croatia²⁶
- DCMI/JISC Committee seminar: Five Years On, April, 2012, London, UK²⁷
- LIDA: Libraries in the Digital Age, June, 2012, Zadar, Croatia²⁸
- Global Interoperability and Linked Data in Libraries, June, 2012, Florence, Italy²⁹

Status of projects and issues arising during IFLA meetings: updates

3.8. FRBR Review Group (P. Riva, chair)

P. Riva reported on the consolidation process, which dealt first with user tasks of the three models – FRBR, FRAD and FRSAD, and entity person (London meeting, April 2012),³⁰ to be followed by consolidation of entities and basic relationships (Helsinki meetings, August 2012). F. Leresche and E. Escolano Rodríguez are members of the FRBR RG, and ISBD RG's liaisons, while M. Willer, ISBD RG chair, is the observer. The consolidation process will have impact on the ISBD elements, as well as on the ISBD/FRBR mapping particularly in the phase of its work on models' attributes.

3.9. Permanent UNIMARC Committee (M.I. Cordeiro, director of the UNIMARC Core Activity)

M.I. Cordeiro reported on the Permanent UNIMARC Committee (PUC) meeting that took place in Helsinki, 14 August 2012 during which it was decided to propose the two year project for funding a UNIMARC namespace. ISBD/XML SG will actively monitor the development (F. Leresche is a PUC member), specifically in the phase of defining alignment between ISBD and UNIMARC namespaces.

3.10. Issues for IFLA Committee on Standards

ISBD RG stressed once again the importance of online free-of-charge publication of the ISBD consolidated edition. It also gave support to the Namespaces TG's proposal for its positioning within the Committee on Standards as the focal group for technical development and maintenance of IFLA standards and models namespaces, and the liaison with the Semantic Web communities. The social responsibility of IFLA in respect to its standards was particularly emphasized.

3.11. Identification of issues for project proposal for 2013

²⁴ See below, Pat Riva's report on the FRBR Review Group's activities.

²⁵ See at ISBD/XML Study Group website: List of presentations etc., <http://www.ifla.org/node/5664>

²⁶ http://public.carnet.hr/akm/AKM_ostali/AKM15/akm15.htm

²⁷ <http://dcevents.dublincore.org/index.php/BibData/fyo>

²⁸ <http://ozk.unizd.hr/lida/>

²⁹ <http://leo.cilea.it/index.php/jlis/issue/view/368/showToc>

³⁰ Pat Riva. Report from the FRBR Review Group mid-year meeting, 25 April 2012, London. In: SCATNews 37(June 2012), <http://www.ifla.org/files/cataloguing/scatn/scat-news-37.pdf>. M. Willer's attendance was funded by the FRBR Review Group.

The ISBD Strategic Plan includes the proposal to start the survey on the use of ISBD under the working title *ISBD in use and plans*. The proposed text of the survey would be prepared for the ISBD RG's meeting in August 2013 for approval, and be prepared for its online distribution in the first quarter of 2014. This will allow the participants to comment based on the three year period after the publication of the ISBD consolidated edition, and to the ISBD RG's task group to prepare the report for the meeting in August 2014. The survey will include questions referring to the status of the translation into national languages and problems met, the use of the consolidated edition in cataloguing, incorporation of the ISBD into national cataloguing rules, translation of ISBD namespaces and problems met, plans for all those, expectations from the ISBD and its function in future, etc. The survey will be sent to national cataloguing committees, national libraries, national rule-making bodies, special interest groups, and, as possible to other communities such as archive and museum. The volunteers for the task are: A. Galeffi, I. Kavčič and D. McGarry.

Action 20: Task group to prepare the proposal for the survey on use of ISBD for August, 2013.

Relations with other international organizations and committees: updates from other projects and groups

8.1 EURIG meetings (F. Leresche, liaison)

EURIG is the European RDA Interest Group.³¹ There were two EURIG meetings at which it was decided not to deal with the ISBD/RDA mapping, as this is within the ISBD RG's remit. The meeting focused on aggregate issues, and others such as Manifestation entity, which is in the ISBD and IAML range of interest. EURIG planned to meet at IFLA in Helsinki, and the next meeting will be held in Madrid, 21 September, 2012.

Other business

There was no other business.

Respectfully submitted by
Mirna Willer, ISBD Review Group chair

Zagreb, 14 September 2012

³¹ <http://www.slainte.org.uk/eurig/index.htm>

APPENDIX IX: Update on Helsinki meetings: FRBR RG

August 14, 2012

- 1) The FRBR RG names Elena Escolano as its representative to the newly established working group on ICP revision.
- 2) The agenda of the RG's August 13 meeting included discussion of issues raised regarding FRBR attributes by the ISSN Network and by EURIG. François-Xavier Pelegrin attended the meeting to present the issues from the ISSN Network.
- 3) Alignment projects, ISBD/FR and FR/RDA, were raised and included in the list of tasks to be done.
- 4) The FRBR RG has scheduled two half-day meetings to continue working towards the consolidation of the FRBR family of conceptual models. The first meeting on Aug. 10 was attended by 5 people; the main topic of discussion was entity definitions and inherent relationships. The meeting space was courtesy of the Finnish Transport Agency. The second meeting will be held on Aug. 16 to be attended by 8 people; on the agenda is a continuation of the work on entities and relationships, including a start on relationships between entities. The meeting space is offered by the National Library of Finland. The Review Group gratefully acknowledges the assistance of Eeva Murtoma (previously a member of the RG) in arranging everything so superbly.

APPENDIX X: Report from ISO TC46 Annual meetings 2012