



International Federation of
Library Associations and Institutions

ISBD Review Group
<https://www.ifla.org/isbd-rg>

Update on the Work of the ISBD Editorial Group

85th IFLA General Conference And Assembly

Committee on Standards Open Session: *Recently approved IFLA standards*

Monday 26 August 2019, 16.00-18.00

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Abstract:

It is long time that Consolidated ISBD, 2011 should have been revised, according to IFLA standards procedure that establishes that a systematic review process should occur every five years. The paper gives account on the works carried to prepare the revision of ISBD, and the works done since 2018 that a working plan for its revision was approved by the Committee on Standards.

Keywords:

ISBD; International Standard Bibliographic Description; IFLA LRM model; revision

Introduction:

The Editorial Group for the revision of ISBD (IEG) was established in August 2018 immediately after the Committee on Standards (CoS) approval of the *four-years work plan for revision of ISBD 2018-2022*¹. The group met in November and produced terms of reference and some organizational and administrative actions to be done, but much discussion was on the future structure that ISBD would have, and that was mainly the focus.

On May 25th, 2019 a new IEG group was established with some of the members of the previous one.
Current Members are:

Renate Behrens, Elena Escolano (current chair), Massimo Gentili-Tedeschi (observer), Dorothy McGarry, Rehab Ouf, Mikael Wetterstrom, Mirna Willer.

These members have different positions and views on how the revision of ISBD should take place and how it has to accommodate the LRM model. Some of the current members of the IEG also formed part of the Task Group for the Analysis of the Alignment and Impact of IFLA LRM on ISBD (it is

¹ Available at: https://www.ifla.org/files/assets/cataloguing/isbdrg/proposed_work_plan_for_isbd_revision_2018-2022.pdf

necessary to say that this group included a member representative of the LRM Editorial Group, Pat Riva), in order to assure continuity and stability in the progress of the work.

Previous Works

During 2017, in preparation for this revision, the Task Group for the Analysis of the Alignment and Impact of IFLA LRM on ISBD worked on a document with the title at that moment Alignment of the ISBD element set with the IFLA LRM element set based on the ISBD Consolidated edition published in 2011. Although approved by the Bibliographical Conceptual Models Review Group and the CoS, this document received a set of comments during WLIC 2017 that made it appropriate to make some final adjustments in the Introduction to solve the concerns expressed. The document, finally with some adjustments, was approved and published as *ISBD to LRM Mapping* (Final version 2017, as amended in 2018.)² The first aim of this conceptual mapping is to keep consistency between IFLA standards, and the second aim is to help the ISBD Review Group in the work of the revision of the ISBD, and also to help the readers by better understanding the semantic relationships between the ISBD data elements and the attributes and relationships defined in the IFLA LRM model.

This document is fundamental, not only to demonstrate the applicability of LRM, but also to address some concerns expressed by professionals on the alignment or correspondence of ISBD with LRM.

This mapping helped to conclude the applicability of LRM requested by IFLA. As it was reported in the Conclusions of the *Report* published in August 2017³: “... LRM is applicable and that ISBD is a valid and needed extension of LRM”. This report, in addition, presented different possibilities and some recommendations to be taken in the revision of ISBD. To cite the most important ones:

- ISBD Resource class: it is aligned as a sub-class of RES, so it continues being the Domain of the ISBD elements. Resource needs to be disjointed with WEMI entities so that it can be related to any of them (for example, ISBD Notes could be related to W or E or I, not only to M).
- Areas and component statements were also included. Full ISBD areas are aligned as more specific (<) than the LRM Manifestation statement.
- ISBD syntax encoding schemes are needed for statements including many elements. The reason is the added meaning that the ISBD's order of elements and punctuation provide to the information given that justify its declaration in RDF. Encoding patterns are not the transcribed statements themselves, but rather the meta information about the format. ISBD, as rules to which these schemes belong, is a work. It was decided that encoding schemes that will be sub-typed by areas and so on as necessary could be included as a sub-type class of RES.
- To preserve the nature of ISBD (Universal Bibliographic Control) when different options are possible, the one(s) where bibliographic control is not assured should not be used or recommended, but should be discarded (deprecated).
- ISBD as an implementation of LRM, but keeping the ISBD granularity; that is, ISBD as an extension of LRM. Therefore, it was decided to start from ISBD granularity (rather than adopting some opinions that advocated for ISBD being more general).
- After a request to the BCM Review Group for clarification of the wording used in the LRM definition of the attribute Manifestation statement, it was concluded by the BCM Group that there were no relevant differences in the concepts of that attribute in the two standards.
- Instead, the concept of Manifestation in both standards is different in that:

² Available at: <https://www.ifla.org/ES/publications/node/92278>

³ Available at: https://www.ifla.org/files/assets/cataloguing/isbd/OtherDocumentation/isbd-lrm_alignment_report.pdf

- The LRM concept of Manifestation includes “... multiple items from different manifestations are physically combined or joined (books or pamphlets bound together, audio tapes spliced together, etc.) the result is a new singleton manifestation.”
 - ISBD in its current version considers “manifestation” as a published resource, while LRM encompasses any manifestation, published or not” – Therefore the concept of manifestation should be adapted to the LRM Manifestation, with unpublished resources added
- Adaptation to Statement of International Cataloguing Principles (ICP) 2016⁴
 - Analyze who are the users of ISBD
 - The standard should be easy to use but more dynamic: making clear distinctions of definitions, rules, encoding schemes, etc. Also, other relationships coming from the ISBD-LRM mapping could be added, but being explicit that ISBD is focused on rules guiding description, not access points.

Other IFLA documents have to be taken into account:

- *The IFLA Standards Procedures Manual*, August 2014⁵ that at the section 2.7 *Drafting process*, recommends: “

- Be as comprehensive as possible within the limits specified by the scope of the standard.
- Text should be consistent, clear and accurate
- Organise the information for greatest impact
- Complex terms should be defined using the appropriate dictionaries
- A more technical language will be used in drafting conceptual models, rules for resource description and digital format codes. Attention should be given to clear statements and definitions. ...”

Related to the user of the standard, other documents have already established or answered this question:

- *IFLA Strategy 2019-2024*, approved by the Governing Board on 12 April 2019, where the Strategic direction 2 *Inspire and enhance professional practice*, 2.3 Key initiative says: “As the most representative global library organization, we will develop standards, guidelines and other documents that allow all type of libraries, everywhere, to improve practice and adapt to a changing world, keep up with and adopt new technologies, to meet user expectations.” – that is all type of libraries, even those that still are not automated.
- Another document to be taken into account is the *Lyon Declaration on Access to Information and Development*, 2014⁶ – where it is written:
 - “4. Information intermediaries such as libraries, archives, civil society organisations (CSOs), community leaders and the media have the skills and resources to help governments, institutions and individuals communicate, organize, structure and understand data that is critical to development. They can do this by: ... c/ Connecting stakeholders across regional, cultural and other barriers to facilitate communication and the exchange of development solutions that could be scaled for greater impact.
 - 5. Improved ICT infrastructure can be used to expand communications, speed up the delivery of services and provide access to crucial information particularly in remote

⁴ Available at: https://www.ifla.org/files/assets/cataloguing/icp/icp_2016-en.pdf

⁵ Available at: <https://www.ifla.org/files/assets/hq/topics/standards/documents/ifla-standards-procedures-manual.pdf>

⁶ Available at: <https://www.ifla.org/publications/node/11146>

communities. Libraries and other information intermediaries can use ICTs to bridge the gap between national policy and local implementation to ensure that the benefits of development reach all communities.”

It can be deduced that the way to facilitate the application of LRM is not necessarily to replicate the structure, but to explain how to use it at a practical level, adapting the terminology and language to the context and type of the standard (Ranganathan’s *Principle of local variation*).

Plan for revision

The same group of members but with another name, the ISBD Strategy Task Group, based on the previously agreed on documents drafted for the ISBD Review Group the four-year plan already mentioned. That was approved by the Committee on Standards, and highlights as needs to revise ISBD:

- “First, there is a general need to revise IFLA standards periodically in order to ensure they remain up-to-date and that they continue to answer to the needs of their user communities.
- Second, the content of the ISBD should be extended in order to include a larger array of resources, especially unpublished resources. [Note that the Rare Books and Special Collections Section requested from ISBD the inclusion of manuscripts long time ago. A Study group, chaired by Irena Kavčič, with a member also representing the RBSCS, prepared a draft including the proposal. The inclusion of manuscripts was approved by the ISBD RG in 2011, after the Consolidated edition, ISBD 2011, was published]
- Third, the ISBD should be aligned with the overarching conceptual model provided by IFLA, the IFLA Library Reference Model.
- Fourth, ISBD should also be updated taking into account the new principles included in the International Cataloguing Principles (2016), such as Interoperability, Openness and Accessibility.”

This was planned in two stages, flexible on the effort required. In summary the two stages imply:

Stage 1 to be accomplished in 2020:

- Revision of the content: “At the conclusion of the first stage... the resulting revision of the ISBD content text could be published”.
- Aligning the ISBD with LRM with the focus on the Manifestation entity. An assessment and reports will be made by the ISBD RG for the Committee on Standards

2nd stage to be accomplished by 2022 “At this point, two scenarios emerge: either to deem the revision accomplished with this revision, or to engage in a larger revision, encompassing all of the LRM components. The structure of the future standard will depend on that decision.”

During the last two months, the group has tried to reuse the previous IEG’s work on terms of reference for the group and to fulfil the administrative actions planned, such as to establish a workspace to share the needed documents and to allow collaborative work online where all members can contribute and modify the documents. It was agreed that the work would be done mainly virtually. Two virtual meetings have been held in this time with the objective of discussing and better understanding these terms of reference for the group and how these could be performed.

From the previous documentation, already mentioned, there was a clear decision not to lose the ISBD granularity and from the mapping it was also recognized that ISBD deals not only with the Manifestation entity. In addition ISBD is not relational, but it has to be recognized that there are certain

relationships in it. If we accept that for this first stage we focus on Manifestation only, then some part of the granularity will be lost, then we come back again to the subject of structure.

As I said, much debate has taken place in the past on the possible structure of the future ISBD, so much that the debate paralyzed the revision of the content. Therefore, to fulfil the plan, it was agreed by this new group to focus mainly on content revision for this first stage because the structure debate has delayed the work. As content revision progresses, and perhaps parallel to it, the IEG will study a structure that could be used in the second stage of the revision, in order to make a report to the ISBD RG and also to CoS on recommendations for a structure for that second stage.

Concerning Content revision:

In addition to the request made since 2011 from the Rare Books and Special Collections Section to include unpublished resources such as manuscripts that are in library collections, some other proposals have been received since 2015, all concerning cartographical resources, mainly astronomical cartography. Analyses and debates are on course.

The first request coincides with the LRM concept of Manifestation, to which ISBD has to adapt, but again the question arises: to what level of specificity? The request was already accepted by the ISBD Review Group at WLIC 2011⁷, but with some restrictions: “1° -To make reference to ISAD(G) and clearly establish that ISBD is applied for the description of single documents, not for archival collections and; 2° To recognize in ISBD two levels of granularity in the rules: general rules that are not in much detail for unpublished resources (which could be developed afterwards in a specific code); and full detailed rules for published resources.” These conclusions were made when LRM was not finished.

The second type of requests are proposals for revision of cartographic resources. As a general impression some of them are for consistency and for a better description of celestial cartography but others proposals are considered too specific by the IEG, which again brings up the need to consider the level of granularity that ISBD should have.

It is true that ISBD is not completely balanced, and some types of resources are more deeply developed in ISBD than others, as required. So how should we deal with restrictions to some types of resource requests and not others? Since ISBD integrated the specialized ISBDs when consolidation was done, it has to be recognized that ISBD is a standard for consultation not only by general cataloguers, but also by specialists cataloguers. Also has to be taken into account the International Cataloguing Principle on “2.5. Sufficiency and necessity. Those data elements that are required to: facilitate access for all types of users, including those with specific needs; fulfil the objectives and functions of the catalogue; and describe or identify entities, should be included.”⁸ We need to consider all the proposals and decide if accept them. The group is just at this stage of discussion.

Concerning the future Structure of ISBD:

This aspect constantly arises and mixes with the previous one, as part of the approved stage 1 plan is to analyze the needs for description of Manifestations and the possibility of enlarging for the 2nd stage the inclusion of all the LRM entities. This debate is certainly the most engaging, and is the reason why the meetings for the group have been organized postponing this issue on the agenda. However, it is not always easy, as we have to keep in mind and constantly consider the implications for the future development of ISBD.

Communication

Members of the IEG have contacted colleagues from their libraries and external bodies to receive their comments on specific issues, such as ONCE (Organización Nacional de Ciegos Españoles) on the accessibility of the bibliographic information in our catalogues, in order to fulfil the International Cataloguing Principle. The only suggestion that was received did not affect ISBD.

⁷ Available at: https://www.ifla.org/files/assets/cataloguing/isbdrg/meeting_2011.pdf

⁸ Available at https://www.ifla.org/files/assets/cataloguing/icp/icp_2016-en.pdf

The Spanish Observatorio Astronómico Nacional (OAN) was contacted to receive the first response on the astronomical cartography proposals. The International Astronomical Union has also been contacted for consultation but no response has yet been received.

The Rare Books and Special Collections Section representative has been in contact, and the whole documentation was sent to the Section including the *ISBD – LRM mapping*, amended in 2018, in order to receive more RBSCS input during WLIC.

Conclusion

Debates are ongoing, therefore in this presentation we risk to offer what could be a personal view. It can only be said that there are some possibilities, two radical ones in the extremes: ISBD could keep its structure (as it has demonstrated the mapping with LRM) or fully adopt the LRM organization. But an intermediate option could also exist. Now is time for the group to analyze these possibilities in order to present to the ISBD Review Group and CoS a recommendation, and if possible to work on the current revision in this way to facilitate an enlargement.

Trying to be clear and understandable, to accomplish what was said in the Lyon Declaration (2014), “helping to organize, structure and understand data that is critical to development” using terminology the librarians are used to and able to understand, because the ISBD is not a conceptual model and can’t be confused with one. At the same time, providing a structure that will be able to give room for enlargement to accommodate other LRM entities and IFLA standards, if possible, should be done.

Thanks to Dorothy McGarry for her invaluable help

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