

**ALA Midwinter Meeting Report
Report from the MARC Advisory Committee (MAC) and MARC or BIBFRAME-related Sessions
Philadelphia, Pennsylvania, January 24-28, 2014
Submitted by Sandy Rodriguez, Chair, MARC Formats Subcommittee, MLA BCC**

MARC Advisory Committee (MAC)

Chair, Matthew Wise (NYU) welcomed everyone to the very first meeting of the MARC Advisory Committee (MAC). The members of the MARC Advisory Committee now have voting privileges and make recommendations that will be carried forward to the MARC Steering Group, made up of the Library of Congress, Library and Archives Canada, the British Library, and the Deutsche Nationalbibliothek.

In order to get the minutes out to the community in a timely fashion, minutes will no longer detail every speaker's contributions to the discussions. Instead they will be taken in summary form, much like that of the representatives' reports.

Introductions were made and the 2013 Annual Meeting MARBI minutes were approved.

Proposal No. 2014-01: Defining Indicator Values for Field 588 Source of Description Note in the MARC 21 Bibliographic Format

Presented jointly by CONSER and OCLC. This proposal is a follow-up to [Discussion Paper No. 2013-DP05](#), and presents a solution for defining the first indicator of MARC 21 bibliographic field 588 to allow for a display constant controller for *Source of description* to replace the commonly used captions *Description based on* and *Identification of resource based on* in order to avoid common misspelling.

Discussion centered on the restrictive language of the phrase and the limitation of making its application a requirement rather than optional. Regarding the restrictive language of the phrase, it was noted that the field had other uses outside of identifying source of description, thereby making the wording somewhat restrictive; however, the paper had identified the two prevalent phrases embodying source of description and was an attempt to address those uses, specifically, and was not to be restrictive in any way. Catalogers could continue to use the 588 for other purposes. Regarding wording in the proposal that suggested that coding the new indicator value in lieu of including the phrase in subfield \$a of the 588 would be mandatory, it was noted that those relying on systems that were unable or unwilling to configure their systems to take advantage of the new indicator value would not be able to continue to use macros to generate the phrase in subfield \$a for this purpose. Everyone agreed that the language in the paper should be revised to reflect its use as an option rather than a requirement. The proposal was unanimously accepted with the following revision: When a display constant is used, then such introductory terms are not carried in the MARC record.

Proposal No. 2014-02: Making Subfield \$c (Location of meeting) Repeatable in Fields X10 and X11 of the MARC 21 Bibliographic Format and Fields X10 and X11 of the MARC 21 Authority Format

Presented by the Canadian Committee on MARC. The paper supports higher granularity of place names in the X10 and X11 string by making subfield \$c (Location of meeting) repeatable.

Discussion centered on the omission of "and" in the examples, and the differences between AACR2 and RDA when recording more than one location. In the context of RDA, there would not be a great need for this proposal, but MARC is rule-agnostic so some communities may find this useful. If retaining "and" then it would be part of a location's parsed data so connectors would likely need to be dropped. It was noted that locations are coded more granularly in the 370 so it's not necessarily the job of the authorized access point string. Ultimately, headings will be assembled by the information in the element set. Some expressed concern that people would see the change as mandatory rather than just allowing divergent practices. The proposal was unanimously accepted as written.

Discussion Paper No. 2014-DP03: "Miscellaneous information" in Topical Term Fields and Geographic Name Fields of the MARC 21 Bibliographic and Authority Formats

Presented by the German National Library. After a merger of four authority files in German-speaking countries, the same entities used different subfields resulting in the use of subfield \$g "Miscellaneous information" to parse out parenthetical qualifiers. The Germans would like to continue to use subfield \$g for this purpose in the topical and geographic name fields of the MARC 21 Bibliographic and Authority formats and would also like for the subfield to be repeatable.

The committee recommended the following: 5.1) It was noted that subfield \$g is not typically used for this purpose and corresponds to a number of defined elements. A suggestion was made to define it as "Qualifying information" instead of "Miscellaneous information"; however, if looking across the other fields, we have reached the limit of ISOMARC, i.e., there are not enough letters of the alphabet. That said, these two fields aren't running out of subfields. The primary argument against parsing out the qualifier was the belief that the term and qualifier form a single concept, i.e., the unqualified term would not be meaningful on its own. 5.2) A use case was presented demonstrating an option that does not dictate a change in LCSH so it would likely not negatively impact other workflows. 5.3) Yes, redefining subfield \$g "Miscellaneous information" as repeatable would be beneficial.

Business Meeting

Library of Congress Report

LC is able to publish MARC Updates fairly quickly—within 2-3 months after a meeting. MARC Update 17 was published in September. A decision was made to cease production of a printing version (PDF) of the MARC Concise Formats due to the lack of downloads.

BIBFRAME examples

The purpose of including BIBFRAME examples in MAC papers is to start looking ahead and to consider another perspective. Does it or does not easily translate from MARC to BIBFRAME? Sally McCallum (Library of Congress) created the BIBFRAME examples and a new version was released the previous week. No group is yet vetting BIBFRAME as it is not set. We are currently in the implementation experimentation stage which will help inform the overhaul of the vocabulary. McCallum encouraged people to experiment with implementing BIBFRAME to help discover what works and what doesn't work.

Proposal No. 2014-03: Renaming and Redefining 347 \$f (Transmission speed) in the MARC 21 Bibliographic Format

Presented by the British Library. This paper proposes to widen the scope of 347 \$f (Transmission speed) to encompass non-audio and non-video resources by using RDA terminology as it more accurately describes what is happening. Bitrate is recorded data rather than a live stream.

The only concern raised was whether the term "bitrate" was a stable nomenclature. The proposal was unanimously accepted as written.

Discussion Paper No. 2014-DP01: Designating Never Published in the MARC 21 Bibliographic Format

Presented by the German National Library. This paper discusses a way to designate a status of "never published" for a bibliographic resource.

Some concern was raised on the value of keeping such records, but most agreed that it would be useful from an RDA perspective and helpful to preserve the metadata. A point of clarification was made that the status of "never published" would not apply to unpublished resources that are considered separate manifestations (e.g., manuscripts), but would rather apply to bibliographic records representing a planned publication that is not published, for whatever reason (e.g., the original publisher decides not to publish the resource, and either it is published by a different publisher or it remains unpublished). One prominent

solution was offered by the British Library: to use the existing MARC Bibliographic [366 "Trade Availability Information"](#) subfield \$c (Availability status code) ONIX vocabulary lists 54 and 64. The 008/06 Type of date/Publication status solution would require the extra step of stripping the date out so most agreed that the 366 option would be better from a human-readable perspective.

Discussion Paper No. 2014-DP02: Relationships Between Subject Headings from Different Thesauri in the MARC 21 Authority Format

Presented by the German National Library. The paper discusses various methods to establish cross-thesaurus mapping in the MARC authority record.

Discussion centered on how it would be used and maintained if a term name was revised and how problematic the 1-to-2 relationships may be. The committee recommended the following: 5.1) This could prove a useful option; 5.2) defining subfields \$i and \$4 in MARC Authority fields 7XX is one approach; 5.3) A solution for the 1-to-2 relationship is difficult to arrive at because something must make clear that the terms are tied together. Some suggestions include: the use of subfield \$8 or the addition of a scope note, although scope notes have no relevance with systems and could not be automatically exploited.

Discussion Paper No. 2014-DP04: Recording RDA Relationship Designators in the MARC 21 Bibliographic and Authority Formats

Presented by the Canadian Committee on MARC. This paper explores options for presenting user-friendly displays for recording RDA relationship designators in the MARC Bibliographic and Authority formats. Options include: 1) issue RDA best practices for display text and rely on existing MARC 21 coding, or 2) Define additional coding to separate user display from granular recording of relationships.

It was noted that the JSC has plans to look at the relationship between the relationship designator and public display so the outcome of that work may eventually alleviate this issue. Fundamentally, how WEMI is interpreted by a machine is yet to be seen. Other points raised include a concern for miscoding because of the confusion surrounding the application of WEMI and a concern for coding something that may eventually not exist (i.e., expression) in the BIBFRAME editor. Ultimately, it was decided that the permanent solution lies beyond MARC so the committee recommended Option 1 for now.

MARC FORMATS TRANSITION INTEREST GROUP

Curating MARC Indexing to Optimize Discoverability of Resources at the ECU Libraries

Marlena Barber (Collection Services & Metadata Librarian, ECU) discussed reasons their institution replaced their OPAC, the decision to replace it with an open source solution (VuFind) in order to gain control of the design and display, the implementation process, and examples of what customizations they made to meet the needs of patrons. They are currently running their installation of VuFind in beta, but plan on doing assessment for further customization.

Book Artists Unbound: An EAC-CPF-based Discovery Tool for Contextualization of Creators

Allison Jai O'Dell (Special Collections Cataloging & Metadata Librarian, University of Miami Libraries) presented a model which migrates existing rich metadata in MARC authority records to EAC-CPF, exposing relationships between entities and essentially taking creator metadata outside of the context of resource description. She noted the many tools developed to leverage and visualize the data including SNAC (The Social Networks and Archival Context Project), RAMP (Remixing Archival Metadata Project), and xEAC (XForms for EAC-CPF). In their project, they extracted relevant MARC records and input that data into EAC records; added artists' statements, geographic location, school they graduated from, etc.; wrote a basic XSLT to display the data + jquery; used RAMP to bring in subject and genre data from the Library of Congress; and used the expressed relationships to visualize the data.

Building on the Past: (Re)Constructing Comprehensive Title Histories for Serials Management using MARC Records

Jeff Stetson (Senior Database Developer, ProQuest) described ProQuest's project to use MARC records in their solution to address the difficulty in managing histories of serials, e.g., ISSN changes, mergers and splits, title suspensions and restarts, volume and issue and full-text gaps due to changes, etc. The goal is to build comprehensive title histories as WEMI-based related works to make it easier to find, identify, select and obtain, essentially keeping researchers and patrons connected to content when a title changes. They are currently in the development process, but will be working with provider data managers, serials specialists, and a cataloging team to do testing so that they may provide this as a future service to librarians.

LIBRARY OF CONGRESS BIBFRAME UPDATE

BIBFRAME Developments

Sally McCallum (LC) provided updates on developments from the past year and future plans into next year. Over the past year, LC developed a high level model that takes advantage of a new environment, analyzed many facets, developed tools and experimented with existing data, and carried it out in an open environment. The plan for 2014 will be an emphasis on test implementations. The [BIBFRAME Testbed Initiative](#) will establish parameters for participation, include a registry of implementers and will involve LC in a coordinating role to keep information circulating. LC will offer several services to support implementation testing including establishing the core vocabulary, providing basic software components, and providing analyses and discussions on topics. Other goals for 2014 is to improve the web presence by better integration of the two sites (<http://www.loc.gov/bibframe/> and <http://bibframe.org/>) and providing multiple views of the vocabulary. McCallum ended by encouraging wide implementation and experimentation with BIBFRAME.

BIBFRAME report from the German National Library

Reinhold Heuvelmann (Deutsche Nationalbibliothek) detailed the German National Library's efforts to learn and implement BIBFRAME for testing. He described the process which included many discussions on vocabulary and how they used metafactory to map and convert data for developing a prototype design. A demonstration on the BIBFRAME representation in the OPAC was given with the caveat that it has not yet been activated. The DNB's next steps include synchronizing with BIBFRAME vocabulary 1.0, clustering of works, representing relationships, expanding bf:Authority, among many others.

Treadmill for the Mind: Transitioning to think BIBFRAME

Jackie Shieh (George Washington University) described the process of training her technical services staff to think in terms of BIBFRAME in order to ensure a smooth transition on their journey as a BIBFRAME early experimenter. Shieh demonstrated how they were able to learn to think in terms of data and relationships, how they could use existing MARC data and enable \$0 to aid in the transition, and detailed the various lessons they learned along the way, including the importance of getting support from library administration, building upon simpler and less complex scenarios, collaborating to strengthen services, fostering a learning environment, among others.

An Introduction to BIBFRAME Profiles and Supporting Editors

Eric Miller (Zepheira) detailed the BIBFRAME approach to developing a core model for effectively sharing, navigating, and collaborating on the web to enable better discovery of assets that cross organizational and institutional lines. The BIBFRAME approach includes identifying functional descriptive requirements among various stakeholders, balancing the creative tensions between descriptive needs of past and future, recognizing there is no "done" but rather an evolving process, defining a high level of Linked Data content/carrier model, creating web identifiers of "nouns" and "verbs," under specifying the shared schema, and providing a lightweight means of constraining the option space to support specific individual and community needs. Miller discussed BIBFRAME profiles as a shareable blueprint and gave practical examples. He followed that with a live demo of the BIBFRAME editor prototype.

CaMMS FORUM ON THE BIBLIOGRAPHIC FRAMEWORK INITIATIVE (BIBFRAME)

MARC Tags to BIBFRAME Vocabulary: a new view of metadata

Sally McCallum (LC) detailed the differences between MARC and BIBFRAME structure, data values (range), and classes. She discussed BIBFRAME's four primary classes (work, instance, authority, and annotation) and BIBFRAME vocabulary in relation to MARC data. McCallum then provided examples using titles in the context of BIBFRAME and MARC. She demonstrated BIBFRAME's fundamental targets of describing a cataloging resource and linking it (both general and specific relationship properties) to other cataloging resources by using title to title relationships as an example. McCallum concluded by encouraging everyone to look at the [category view](#) of the BIBFRAME vocabulary.

BibFlow: Reinventing Cataloging: Models for the Future of Library Operations

Michael Colby (University of California-Davis) described a 4-phase grant project to develop a roadmap for converting MARC record catalog and non-MARC metadata into BIBFRAME with a focus on academic library technical services processes. Along with their partners (which include Kualii, Zepheira, OCLC, NISO, LC), they hope to address the following questions: How does existing software, systems and workflows inhibit adoption of new standards?; How effective is simple conversion?; What can be achieved by a NG LMS using new standards?; How might NG LMS and workflows work in the wider library data ecosystem?; Is incremental adoption feasible?; Can libraries adopt at different times?; What investments should libraries make and when? Their work will be documented at <http://www.lib.ucdavis.edu/bibflow/>.

Eric Miller demonstrated the BIBFRAME editor prototype and how the data can be used for customized views in ViewShare.

HEADS OF CATALOGING INTEREST GROUP

Living Up to One's Digital Potential in a Traditional Cataloging Unit

John Riemer (UCLA) described how digital library project work can and should fit into a transformed cataloging unit. He described the benefits and opportunities of this approach including leveraging their experience in organizing resources in a systematic way, their consistent approach to metadata, revitalizing staff with new challenges, support for existing FTEs, and improving odds of getting vacant positions back. Also discussed is how to prepare staff to take on new work, levels of involvement in digital activity, finding the capacity, measuring the work, and the role of authority work in the new metadata program. For more details on Riemer's approach on incorporating digital projects into a traditional cataloging unit, he noted to his article, "The Expansion of Cataloging to Cover the Digital Object Landscape" (CCQ, 2010).

Evolution, Revolution, Transfiguration (Something wonderful is about to happen)

Philip Schreur (Stanford) discussed Stanford's history in reorganizing/remodeling Technical Services and outcomes; how the Digital Library unit was formed with people from various units; how they embarked on staff development by allowing 20% of staff time to be spent on investigating new developments and tools; how they were tapped for their cataloging and metadata expertise and the use of linked data for authority control in the Digital Library; and how they used their explorations to justify and retool new positions (e.g., Linked Data Technologist).

Schreur ended with personal speculation on the four things that will change us (Transfiguration): (1) The outsourcing of linear workflows and the change to project-based orientation; (2) The outcome of the battle of multiple databases of records (e.g., ILS, digital repository) will result in consolidation. Schreur speculated that digital repositories will win since it can deliver both metadata records and digital objects; (3) We will leave MARC for Linked Data and BIBFRAME which will have a big impact on organizations and programs such as PCC; and (4) New partnerships will form, e.g., Digital Library unit and Metadata working closely together, Backstage working on developing a BIBFRAME service, etc.