**International Federation of
Library Associations and Institutions**

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

**Meeting:
Monday November 12 - Wednesday November 14, 2018**

-Minutes-

Attendees: Renate Behrens, Dorothy McGarry (online), Rehab Ouf, Clément Oury, Mélanie Roche (chair)

Observers: Mikael Wetterstöm (ISSN International Centre)

1. Welcome and introductions

M. Roche welcomed the members and observer. A Skype connection was set up to allow D. McGarry to follow the discussions even though she could not physically attend the meeting. The Editorial Group wishes to thank the National library of France (BnF) for providing the premises and logistical support.

2. Approval of the agenda

The agenda was approved without change. Note that these minutes do not necessarily reflect the chronological order in which each topic was discussed.

3. Project Management Business

3.1. Refinement of timeline

The group revised the draft timeline sent by M. Roche so as to take into account the final stages of validation of the revised text after the world-wide review. The timeline also takes into consideration information to the Committee on Standards (CoS), even though the ISBD Review Group (ISBD RG) will be the one reporting to CoS. The finalised timeline will be distributed to the ISBD RG along with the minutes and the other documents arising from the meeting.

3.2. Methodology

According to the finalised timeline, the group will have four face-to-face meetings within a period of two years. Meanwhile, e-mail discussions will necessarily arise, but should be limited to the strict minimum in order to avoid endless exchanges: controversial issues will be fixed during face-to-face meetings, or if need be during emergency online meetings. Once some technical issues are settled at BnF, all work documents and material for revision will be centralised in a BaseCamp folder that IFLA has provided for the group.

4. Alignment with Manifestation Statement Attribute

The group started with the 2017 alignment between ISBD and IFLA-LRM, and took out all the elements that did not relate to the Manifestation entity. Syntax Encoding Schemes were also left out, at least for now, because they are meta-elements used to describe elements, but not elements in themselves. Because we wanted to look at how an LRM-compatible structure would look like, the group reverted the original alignment so as to take the IFLA-LRM as source.

The resulting table proved very useful to spot areas where revision was needed, either on a structural level or in the wording of elements and definitions. This should not be considered an alignment *per se*, but a correspondence table between the attributes of LRM-E4 Manifestation, and the corresponding elements in the ISBD: it is a first step in the assessment of the impact of the IFLA-LRM on the ISBD with which the group was tasked by CoS (see terms of reference, section "Scope").

Only Manifestation attributes were looked at, but relationships may be included later on if the ISBD RG thinks it is needed. A column was added for comments: this is where the group suggested revisions or raised questions. The table will be distributed to the ISBD RG along with the minutes of the meeting, and will be the basis of a preliminary set of recommendations/questions to be issued to the ISBD RG. The answers to these questions will be examined during the IEG February meeting, and will shape the future structure of the standard.

5. Issues arising from WLIC 2018

5.1. Scope and usage of ISBD

The ISBD is the basis for a truly international bibliographic description. Although the UBC program was abandoned a few years ago, the aim of the ISBD is still to allow sharing and interoperability of bibliographic information throughout the world, regardless of economic or technological differences. This strategic aim is to be re-affirmed in the revised version of the standard.

The position of the ISBD as the only freely accessible standard remains one of its main strengths, as not every library can afford a subscription to a cataloguing code such as RDA. In that respect, Clément Oury reminded the group that the ISSN Manual is based on the ISBD instructions for serials, and is widely used by 90 countries in very different cataloguing contexts around the world. It is therefore critical that the ISBD remains freely available, because the ISSN cannot use any copyrighted material.

The ISBD should focus on what it can provide for the description of manifestations that other codes such as RDA cannot. While RDA is increasingly turning into a toolbox providing a general framework for the description of resources, the ISBD should provide precise instructions as to the source, choice and transcription of elements. It would thus be the basis for an international application profile such as the one on which EURIG will soon start to work. The recent developments of RDA therefore work well in the favour of the ISBD: the more flexible RDA, the stronger the need for precise instructions that only the ISBD can provide.

The use of the ISBD is to build bridges between other standards and codes. The timeframe for that goal is quite convenient, because there has been a lot of momentum following the publication of the IFLA-LRM in 2017. Now is indeed the time to reassert the position of the ISBD within the IFLA suite of standards. While the IFLA-LRM is still quite new for the moment, an increasing number of professionals is quickly getting familiar with it, not only in the library community but also in archives and museums, as well as in the publishing community. ISBD must be part of that change, otherwise it will become obsolete. However, many may not become extremely familiar with the model, but that does not necessarily mean they are following ISBD instructions blindly.

One of the goals for the revision of the ISBD is to provide instructions for non-published resources. Does that mean that objects should be included in the revised text of the standard? The Editorial Group does not believe so: the ISBD should focus on *bibliographic* resources. There should therefore be a very clear-cut and unambiguous definition of what part of "unpublished" resources fall into the bibliographic universe and therefore into the scope of the ISBD, keeping in mind that archival material already have their own description standard, which is ISAD.

5.2. Terminology

Since the group was appointed with the task of assessing the impact of the manifestation entity on the ISBD, it is logical that the same terminology should be used in the model and the standard, whenever it is relevant to do so. It is clear that systematically replacing the word "resource" or "publication" by "manifestation" would be a mistake, and lead to nonsense. There are indeed many instances in which the word "resource" is relevant, because it does not exactly match the concept of "Manifestation". However, when "resource" strictly matches the definition of "Manifestation" given in the IFLA-LRM, the terminology should change. The Editorial Group has started to suggest such changes in the correspondence table, and will ask the ISBD Review Group whether to pursue in that direction.

D. McGarry remembers that during their Berlin meeting in 2003, the ISBD RG already assessed the feasibility of replacing the word "resource" by the relevant FRBR entity, but finally decided it was not a good idea. The context was different then, since the ISBD RG hadn't been given the specific task of aligning the ISBD with the manifestation entity, and definitions may have changed in the light of the new model IFLA-LRM. However, M. Roche will ask Massimo Gentili-Tedeschi and Elena Escolano if a copy of the report can be found, in order to learn from the lessons of that work.

6. Brainstorming session 1: punctuation

While the main goal (and strength) of the ISBD punctuation is to provide unambiguous information, this aim is not totally achieved at the moment, and ambiguity can arise, for instance when an area is missing (there is no way of signalling it, which makes machine processing of the data very difficult), or in area 2 where one sign (the semi-colon) can have different meanings. There is a consensus within the Editorial Group both to reaffirm the necessity of punctuation, and to extend the current set of punctuation signs. For instance, the pipe sign (|) could be used to signal a missing area. Other modern and widely-used punctuation signs such as @ or # could be used, but they often appear on titles or names, and may not be so convenient. Rehab Ouf will run a short survey among national libraries to explore their use of the ISBD punctuation, and issue a report of that survey by the next meeting.

This being established, is it possible to use ISBD instructions without using punctuation? There is no consensus within the Editorial Group as to the question. The ISBD was originally made to provide elements, order and punctuation, but it is true that today many institutions are actually using ISBD instructions without punctuation, and most online catalogues don't use the whole set of prescribed punctuation. Even large, national catalogues such as the catalogue of DNB or BnF do not provide ISBD display today (although this is temporary for BnF, because the ISBD display is currently under development).

The Editorial Group examined the idea of having an Appendix dedicated to punctuation, but this was discarded because it would result in making it seem too much like an option, whereas it remains as one of the main strengths of the standard. Incorporating the prescribed punctuation within the body of the text itself, meaning attaching the prescribed punctuation to each element, would be very difficult to achieve technically, and would fail to give a general overview of an ISBD record displayed according to the prescribed punctuation and areas. This idea was therefore discarded too. Punctuation schemes could therefore remain in a general introductory chapter to the standard, just like it is at the moment.

In terms of marketing and positioning of the ISBD within the bibliographic world, punctuation is still very important today. However, we should be aware that if punctuation is too intrinsically linked with instructions, then the standard risks being considered obsolete, as many will perceive it as intended for cataloguing cards only.

What is at stake with the potential distinction between instructions for display and instructions for data input is the training of future cataloguers, the modern status of the ISBD and the perception of the standard. Such a distinction would indeed represent an innovative leap for the ISBD, because it would stress the importance of punctuation, all the while making it clear that the standard is actually broader than punctuation (a fact that seems to be often understated today). Such a leap will have to be advertised to communities who use the ISBD prescribed punctuation within their own set of rules, such as MARC21.

7. Brainstorming session 2: structure

The revised edition of the ISBD will have a double ambition: that of promoting LRM-compatible cataloguing, while supporting all cataloguing contexts. In other words, advocating for modern data input while ensuring backward compatibility between the old and the new versions of the standard. This may not be a comfortable position, but it is the role of the ISBD to build bridges between communities, regardless of their level of technological context or their advance in cataloguing/linked data input. It is also a genuine IFLA approach. The future structure of the standard should therefore reflect this double ambition, and provide both a stand-alone application organised by elements, and a pdf file generated on the fly that could be used as a print-out.

In that context, do we still need Areas or can we organise elements according to the Manifestation attributes, as was done in the assessment table? Areas were very useful in the past; however, much like punctuation, their main purpose is display of information, and the revised structure of the ISBD should establish a clear-cut distinction between the instructions for data input and instructions for display. Areas could therefore be kept alongside punctuation in a general chapter. Such general chapter will still be needed to sell out what is needed in each area, and we should make sure this general chapter is not too general.

Although the idea of a general chapter may not seem adapted to an online structure, it is still very much needed. Here are the recommendations of the IEG: a general part for generic rules, a second part with elements aligned on the IFLA-LRM. Chapter A of the current text could be a starting point, once we reduce it to strictly Manifestation level (for instance, instructions on title changes relate to the Work level).

The Editorial Group recommends that the future version of the ISBD should contain a larger variety of examples, both in terms of languages/scripts, and of types of resources. Providing a larger, more diverse set of examples will be one of the main tasks of the content groups.

8. Work on structure scenarios

Given the discussions of the Editorial Group and the preliminary assessment table, the final output of the future ISBD will most likely be manifold, and could for instance consist in:
- a general introductory chapter with instructions for display (punctuation and areas), and possibly a chapter for serials;
- a set of elements defined as an implementation of the IFLA-LRM, and organised by elements rather than by areas. This would represent the core of the standard;
- a pdf print-out of this "core instructions" to use as a manual for data input.
- mappings to RDA, MARC21, UNIMARC, ONIX, and possibly other formats.

9. Communication strategy and action

9.1. Professional community

9.1.1. Professional Associations

- EURIG
  R. Behrens is a member of EURIG and will report on the group's activities to other EURIG members.

- IFLA
  - Division Three:
    Work on the revision of ISBD will be represented at IFLA 2019 (Athens) during the IFLA metadata session. There will also be a day-long ISBD meeting after the conference. This will be a good time and place to reach out to other metadata-oriented IFLA sections.

  - CDNL:
    The Conference of Directors of National Libraries may be approached. In that case, the message should adapt to the audience, and focus on the strategical stakes of the ISBD.

  - New Professionals Special Interest Group:
    In order to interest the newer generations of librarians to the status and importance of the ISBD, links should be created with NPSIG, notably on the initial training of cataloguers.

- ALA
  The ALA June conference can be an excellent place to reach out to the Anglo-American community, which often overlooks the importance of ISBD in the context of international bibliographic description. Calls for presentations for ALA in June are already closed, but most presentations are organised within the sections themselves and do not need a call for paper. It is therefore up to the group to contact any interested body. M. Roche will contact Gordon Dunsire to see whether a presentation of the IEG might be of interest during the RDA session that is organised every year. The chair of CC-DA may also be approached.

9.1.2. Professional Journals

- *IFLA Metadata Newsletter*
  An article is planned for the December issue of the *IFLA Metadata Newsletter*. M. Roche will draft a first version of the article and send it to the other members of the IEG and to the chair of the ISBD RG before publication.

- *Cataloguing and Classification Quarterly*
  An article may be proposed to *Cataloguing and Classification Quarterly* for peer-review. As the process of validation and publication may be quite long, the article should stick to a theoretical level in order to avoid being obsolete as soon as it is published. It could for instance be an account of the strategic goals of the ISBD today. The aim is to reaffirm the position the ISBD within the IFLA suite of standards, and therefore confirm the position of IFLA as a standards body. C. Oury, suggested "Make ISBD great again" as a working title, but this might be too sensitive to be carried out.

Each member is encouraged to publish articles or news flash in their own national/local library journals.

9.2. Social media

9.2.1. Twitter

Four members out of five have a Twitter account. These should be used to follow and retweet each other, using the hashtags #IFLA and #ISBD, to tell the larger community that work is going on, without entering into too much detail since the number of characters is limited.

Official accounts are more followed than individual accounts: members should therefore use and mention official accounts such as @IFLA, @BnFMonde, @DNB, @ISSN_IC and others. Using different languages would also extend the potential audience of the work.

9.2.2. Facebook

Each member of the Editorial Group is invited to reach out to the communities they belong to. For instance, M. Roche is part of the group "Troublesome Catalogers and Magical Metadata Fairies", which presents an interesting mix between very technical preoccupations ("which MARC21 field do I use to record such information?") and broader issues about the future of the profession. It can be a useful tool to relay relevant information.

9.2.3. Blogs

The advantage of blogs is that they are easy to read and visible on Google. One example of cataloguing-oriented blog is *Librarianship studies and information technolog*y (https://www.librarianshipstudies.com). M. Roche will also investigate the hypotheses.org portal of BnF, in which there might be a blog about cataloguing or metadata.

10. Wrap-up of the meeting

10.1. Next IEG meeting (early 2019): dates and location

Next meeting will take place from February 26 to February 28, 2019 at the DNB in Frankfurt (subject to availability of meeting rooms). The dates and location are to be confirmed within the next few days: if for some reason they proved not possible, a Doodle poll will be launched to secure a new location and/or a more convenient date.

The goal of the meeting will be to take into accounts the feedback from the ISBD RG on the preliminary assessment. The outcome will consist in a concrete structure scenario.

10.2. Distribution of tasks

M. Roche will draft a first set of recommendations/questions, to be sent out to the chair of the ISBD RG after review by the IEG, and commented on by the ISBD Review Group within a reasonable timeline. This document should not be more than one page long.

Respectfully submitted,
Mélanie Roche
November 18, 2018