

## **AALL MARBI Representative Report**

### **Annual Report**

The Machine-Readable Bibliographic Information Committee (MARBI) is an interdivisional joint committee of the American Library Association and meets with the MARC Advisory Committee, which is the voting body for the MARC format. MARBI is primarily responsible for the development of the MARC 21 formats. MARBI holds meetings twice a year, during ALA's annual and midwinter conferences. MARBI consists of nine voting members, who make up the MARC Advisory Committee, and three interns. The meetings are also attended by ex-officio representatives of national libraries and OCLC, and several dozen non-voting liaisons from ALA units and from non-ALA organizations with an interest in library automation standards.

At the meetings, the MARBI decides on actions to take on the discussion papers and proposals that have been presented to them. The discussion papers are the first step to suggesting changes in the MARC21 format and explain the need for a new field or subfield and then indicate which new or revised fields should be added to the MARC format. The Committee decides whether to request a proposal based on the discussion papers for the next ALA meeting. The Committee then votes on the proposals and either rejects them, requests revisions which will then be reconsidered, approves them or approves them as amended. If a proposal is approved, the changes will be included in the MARC21 revision to the online version, which is usually published annually.

The previous representative, George Prager, attended the ALA Annual meeting in June 2011, held in New Orleans. I took over as representative to MARBI at the ALA Midwinter meeting held in Dallas January 21-24, 2012.

### **MARBI Meeting ALA Midwinter Meeting January 21-24, 2012**

#### *Proposal No. 2012-01: New Data Elements in the MARC 21 Bibliographic and Authority Formats for Medium of Performance*

This was the only proposal discussed at the meeting. This proposal addressed the need for more specific encoding for medium of performance in the MARC 21 Bibliographic and Authority Formats, beyond the data that is currently recorded in subject headings and is of most use to music catalogers. It was proposed to expand the MARC field 382 to add greater specificity, add an indicator to indicate whether the data is complete or partial, and add subfields for soloists, doubling instruments, and number of performers. Because of the different terminology and granularity of RDA and the expanded field, it may be necessary to repeat the field for the separate vocabularies and usage

requirements. The proposal was approved with amendments that defined the indicator values and renamed some subfields to be more in accord with other subfields for similar information elsewhere in the MARC record.

***Discussion Paper No. 2012-DP01: Identifying Titles Related to the Entity Represented by the Authority Record in the MARC21 Authority Format***

The proposal relates to the 670 field in the Authority Record, which is used to record the source of information about the entity represented by the authority record. It is usually a bibliographic citation, although other information such as phone calls and personal communications are also recorded in this field. It is also used to note that the entity is NOT the author of some other title when it would otherwise appear to be. Thus the 670 contains a mixture of data elements and it was proposed that they be separated into multiple fields. Part of the discussion centered on whether only titles related to the author should be included or if subject relationships could also be added (and how to distinguish them), whether all FRBR levels (work/manifestation/expression/item) should be included or only records for works; the former was preferred. Titles that dealt with Romanized/vernacular pairings and journal article titles are also problematic and may be included in authority records. The MARC Advisory Committee suggested that the paper be turned into a proposal for the meeting at ALA Annual meeting in June.

Most of the second session was a discussion of the future of MARBI and of its relation to the development of a new bibliographic environment, commonly referred to as the “replacement of MARC.” The new bibliographic environment will include more than just MARC and include information on permissions for use of materials and preservation information, as well as bibliographic description and holdings information. The Resource Description Format (RDF), which the new bibliographic environment will be based on, emphasizes linked data instead of individual cataloging records. One of the issues discussed is that MARBI is really a subgroup of the MARC Advisory Group which was formed to advise the Library of Congress on changes to the MARC21 formats. As such, expanding the scope of the group is problematic and the future of MARBI is unclear. It was decided that for now members should participate in the development of the new bibliographic environment as individuals. MARBI will continue to work on supporting MARC until the transition to the new bibliographic framework and there will be a continuing need to develop new fields and subfields as new needs emerge. At some point, MARC will be a legacy system.

**MARBI Meeting, ALA Annual Meeting, June 23 and 24, 2012**

The agenda for the summer MARBI meeting was very long and not completed in the two meetings scheduled. The first item on the agenda was an announcement from

ALCTS saying that although they recognized the importance of the work of MARBI, the close collaboration with the MARC Advisory Committee had diverted its attention from other aspects of its charge. With the move to a new bibliographic framework, there is less need for this kind of work and MARBI will be dissolved at the end of the 2013 ALA Annual Meeting. A joint ALCTS-LITA Metadata Standards Committee (with liaison from RUSA) will be formed at that time. The charge for the new committee is basically the same as MARBI's. Representatives from other library organizations will work with their organizations to review their status.

## Proposals Discussed

### *Proposal no. 2012-02: Identifying Titles Related to the Entity Represented by the Authority Record in the MARC21 Format*

This proposal called for creating a new field, 672, to list titles that are related in some way to the entity represented by the authority record, and also titles known not to be related to it. The proposal assumes that most of this information would be used to assist programs and operators to identify titles and not recreate a bibliography. The titles would only be added as they were discovered and there would be no requirement or encouragement to make an exhaustive list. This information was previously included in the 670 but having it in a separate field makes it easier to manipulate by a program. So a 670 note that said "author of [title]" would now have a 670 for that title. Much time was spent discussing the need for subject information in this proposal but enough people thought the purpose of the subject information was not clear and not necessary and should be removed. It was decided to revisit this proposal at the ALA Midwinter meeting in 2012.

### *MARC Proposal no. 2012-03: Data Provenance in the MARC21 Bibliographic Format*

This proposal discussed documenting the data provenance of classification in the bibliographic record, limited to Dewey classification. The proposers wanted to document the source of classification numbers—either machine-generated or assigned by a cataloger, and some indication of the confidence of the assigning agency regarding the classification number. One option was to add subfields to the 082 (Dewey Classification Number), and the other was to create a new field, 883, for Data Provenance, that would be repeatable and linked to other fields using #8. The new 883 field would not be limited to Dewey classification, but could be expanded to include other fields such as 6XX fields. A modified version of the second proposal to create a new 883 field was approved; the modifications included #u for URI, #a for Process name of other process (ie, machine-generated) and #c for the confidence value. It was unanimously approved.

### *MARC Proposal no. 2012-04: New Data Elements in the MARC21 Authority Format for Other Designation Associated With Person and Title of Person*

This proposal discussed how information on the title of a person was recorded only in the #c in the 100 field and not recorded in a separate field. There is also inconsistency in the format of the #c—sometimes the term is parenthetical and sometimes not. Nowhere is this information explicitly recorded. The proposal suggested broadening field 368 (Other Corporate Body Attributes) to include both corporate body attributes and designations relating to persons. There were two proposed changes and the one that was approved required the field name to be changed to “Other Attributes”, #c to be redefined to include other designation associated with a person, and adding the new #d “Title of the person.”

*MARC Proposal no. 2012-05: Making the 250 Field Repeatable in the MARC21 Bibliographic Format*

This proposal addressed the need for a repeatable 250 field to accommodate edition statements for music. The proposal focused on music cataloging but did note that a repeatable 250 might be useful for cataloging other resources in RDA. With RDA some data that was recorded in the 254 field will now be recorded in the 250 field. The 254 field (Musical presentation Statement) is now considered edition information in RDA, according to the proposers, and so different types of information will be included in the 250. Having only one 250 field will make it crowded and hard to interpret. Some discussion focused on whether the Musical Presentation Statement really did contain edition statements or information about different versions. If this is version information, it does not belong in the 250. The Committee decided that the presenters had not proved their case for the repeatable 250 and requested that a new proposal or discussion paper be resubmitted addressing these concerns.

*MARC Proposal no. 2012-06: Defining Subfield #c (Qualifying information) in Field 028 (Publisher Number) in the MARC21 Bibliographic Format*

This proposal called for adding subfield c to include qualifying information to publisher numbers such as (set) or (disc. 1), or the publisher name of materials with two publisher numbers—one from the label and one on the container. The proposal was amended to change #c to #q and was passed as approved. Expanding this subfield to the 020 was suggested as a Midwinter 2013 proposal.

*MARC Proposal no. 2012-07: Defining New Code for Vocal Score in Field 088/20 (Format of music) in the MARC21 Bibliographic Format*

This proposal was limited to vocal scores and actually proposed new subfields for different types of scores. It was approved as proposed.

## Discussion Papers

*Discussion paper no. 2012-DP02: Authority Records for Medium of Performance Vocabulary for Music*

This paper discussed the options for new controlled vocabulary consisting of medium of performance terms for music. This vocabulary is currently being developed. Field 382 has already been defined in the bibliographic and authority records. This proposal suggests a new set of fields be defined for medium of performance authority records because the 382 does not

work in the same way as other controlled fields such as the bibliographical format 100 or 650. Multiple terms can be valid in the 382 in repeatable subfields and there are questions about how well matching programs would work on the 382. Currently subject headings (650s) containing medium of performance are not required to have authority records. The proposal suggests that having these terms under authority control is a good idea and suggested using the 142 or 152 fields. As a discussion paper, no action by MARBI was required.

*Discussion Paper no. 2012-DP03: Chronological Aspects in the MARC21 Bibliographic and Authority Formats*

This discussion paper proposed some possibilities for recording chronological aspects of musical works, specifically the date or period of origin or creation. This information was previously included in subject subdivisions that will become obsolete with the adoption of the music form/genre terms that are being developed. The 045 field is not useful because it can't include all the information about the creation date that is necessary. It was decided that the 045 field could be used for date or period of creation and not just the chronological period of the material being cataloged and that the 045 and 046 (special coded dates field) will be clearly distinguished. Any changes to the 046 in the bibliographic record would also be made for the authority record. Best practices for use of the 046 and 648 (subject added entry chronological terms) will be written. As a discussion paper, no action by MARBI was required.

*Discussion Paper no. 2012-DP04: Recording Audience Characteristics of Works and Expressions in the MARC 21 Bibliographic and Authority Formats*

This discussion paper proposed adding a new 3XX Field in the bibliographic and authority records to provide information on the audience of the work or expression. Sometimes this information is included in current subject headings or subdivisions, sometimes these terms are combined with genre terms in subject headings and sometimes the audience is only implied in a subject heading. Currently audience is out of scope for inclusion in LCGFT but it will continue to be necessary to include this information somewhere in the record. The 022 (Target Audience) in the bibliographic record is limited to 8 terms that are limited to broad audiences, often by age group (preschool, adult) or are too broad (general, specialized), and there is no place to record this information in the authority record, although it will be useful in works records. The proposed 3XX field would include the category of persons for which a resource is intended and is not limited to age terms. It could include nationality terms, intellectual level of the material, explicit terms for people with disabilities, or other special interests or groups. A straw vote indicated approval of the idea to add a repeatable 3XX field. Although the 521 field was discussed, it does not include controlled vocabulary and would not be good for machine retrieval. Best practices could be developed to aid catalogers with vocabulary terms which would not need to be in LCSH form. Since this was a discussion paper, no action by MARBI was required.

*Discussion Paper no. 2012-DP05: Recording Creator/Contributor Group Categorizations of Works, Expressions and Persons in the MARC21 Bibliographic and Authority Formats*

This paper discusses adding a new 3XX field for the group category of a creator/contributor, some of which are now included in subject headings or subdivisions, is a free-floating subdivision, or is implied in the heading. Geographic terms to represent nationality or country of

residence of the creators are also included as geographic subdivisions. All of this information may be lost when genre/form terms are used because subdivisions are not used and categories of persons will not be included in LCGFT. Since it will still be useful to collate works by persons who share particular characteristics, a new field is necessary to contain some of this information. Existing 6XX fields, such as the 656 (Index Term—Occupation) are meant to be used for the occupations reflected in the resource, not those of the creator. Also the proposers feel that it is better to record this information in the one authority record for the creator instead of in all the bibliographic records linked to that creator. Some of the 3XX fields in the Authority record contain some of this information, such as the 370 for Associated Place which can already include place of birth, place of residence, associated country, it could be expanded to include nationality/regional group information. Other existing fields, such as the 371 (Field of Activity) are less useful because they use terms that do not imply personhood, such as the name of a discipline. Field 374 (Occupation) is recorded in the singular which patrons would probably not look for (the subject headings are usually plural). But these fields in the authority records are defined for attributes of a person or corporate body and not categories of persons, so a new field is proposed, a repeatable 3XX field for Creator/Contributor Group Characterization. It was agreed that such a field would be useful. Since this was a discussion paper, no action by MARBI was required.

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