IFLA Standards Newsletter provides an international forum for news, information, and discussions about IFLA standards and guidelines and their international counterparts.

The newsletter’s aim is to showcase the wide range of standards developed and maintained by IFLA’s professional units, enabling libraries to assess and align their operations and performance in all aspects of librarianship.

International in the scope of standards, it also seeks to highlight the work of national and international peer institutions and standardization organizations as it relates to library and information standards.
Welcome to our Newsletter

Welcome from the
IFLA Advisory Committee on Standards
Newsletter Subcommittee
Ana Stevanovic (Chair), Joseph Hafner (Editor), and Rehab Ouf
Editorial Team

We are pleased to have the second issue of our newsletter about standards and the work of the IFLA Advisory Committee on Standards. We know that sharing information about this work is important to ensure we have access to information about recent trends, updates, conference presentations, work happening in IFLA and around the world and more related to standards.

In the world that is constantly changing, evolving, and growing, especially in the digital environment, is it possible to create and maintain a standard? **By the definition a standard is: “something established by authority, custom, or general consent” and it is “a model or example” or “a rule for the measure of quantity, weight, extent, value, or quality”, or “a structure built for or serving as a base or support.”** It is a stable, basic, well-known, long-lasting concept. So, is it possible to keep track of a standard and all its alterations? The idea of the editorial team was to try to note and follow all the changes, alterations, and modifications of IFLA standards keeping in mind the process and people behind every standard and its evolution.

The newsletter is meant to have a widespread distribution within and beyond IFLA, presenting the state of the art of a highly connected library and information field that produces and benefits from standards.
As an editorial policy, this is a semi-structured newsletter with several fixed sections to maintain the focus of this type of information letters. These sections may include interviews, a keynote article, a standards profile section featuring each issue a different IFLA standard or guidelines, featured articles and updates about recently endorsed standards.

We hope you enjoy this communication tool, and it would be great to have your feedback on this publication, including ideas and contributions for upcoming issues.

We offer special thanks to everyone who has contributed to this publication and made this possible.

Thanks! Merci! شكراً! Хвала!
Ana, Joseph & Rehab

Welcome Letter from our Chair
Victoria Owen
Advisory Committee on Standards

Dear colleagues,

The Advisory Committee on Standards’ (CoS) newsletter for December 2023 is filled with news, interviews, and updates from the world of standards. It offers a window into the many aspects of standards development, revision and related communications and processes.
Our newsletter draws your attention to the new version of the IFLA Standards Procedure Manual and a related piece on the review of standards that come before the Committee. It features the launch of a network dedicated to the development of metadata standards related to accessibility, a necessity for the advancement of equity of access, and an insightful Q&A interview with Professor Athena Salaba, which details her involvement in standards bodies and in teaching standards to LIS professionals. The important technical work of CoS, including ISBDM, Namespaces, and LRMoo, is presented by experts in their fields. I’m thrilled to be part of the standards conversation and look forward to future exchanges.

Sincere thanks to the CoS Communications Working Group (Ana Stevanovic (chair), Rehab Ouf and Joseph Hafner) who solicited, collected, and organized a variety of articles that would be of interest to a wide range of readers.

Victoria Owen

Chair, Advisory Committee on Standards
Athena Salaba
Professor, School of Information (iSchool)
Kent State University, USA

Athena Salaba is a Professor in the School of Information (iSchool) at Kent State University, U.S.A. Her teaching and research areas include organization of information, knowledge organization systems, metadata, presentation of metadata through system interfaces, and user experience when interacting with bibliographic information and interfaces. She has published books, peer-reviewed articles and papers, and has presented on these topics internationally. She is the Chair of Division H in the IFLA Professional Divisions Committee, was previously the Chair of the IFLA Subject Analysis and Access Section and serves as a Board of Directors member and Treasurer for the International Society for Knowledge
Organization (ISKO). She has been involved in the development and review of the FRSAD and LRM bibliographic conceptual models.

**Short introduction to this interview:**

In this interview, our keynote guest, Athena Salaba, traces how her passion got her to be involved in standards development at the crossroad of academia, research, IFLA and other standards organizations.

The interview sheds light on standards development from the perspectives of research, professional work and university teaching, with a focus on career growth and leadership within IFLA. The interview also highlights the crucial role of the IFLA Professional Council through its professional committees in developing IFLA Guidelines and best practices in various topics inspiring and supporting the work of libraries worldwide in all fields of work.

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**How do you get involved in standardization at national/international level?**

One has many opportunities to get involved in standardization. With an interest in effective services and the benefits of standardization, one can be involved in local or regional professional organizations and consortia, which can lead to membership and leadership in targeted committees at national organizations or networks. Given the global nature of librarianship and standards development, this can lead to nominations or involvement in specific projects (for example the RSC for the development of RDA) or broader standardization efforts (for example, participation in W3C projects, volunteering in an IFLA professional unit, involvement in projects across countries in one region). Often a regional or national associations will have an option to have representation in an international standardization committee.

For IFLA work, I encourage attending a WLIC, unit programs, observing unit business meeting and volunteering to help with projects of interest where you can offer an expertise that may not be represented in the unit’s membership. From there look for nomination, election, and co-option opportunities. IFLA members can nominate candidates for membership in various units. Subscribe to IFLA-L, and unit email lists, check the IFLA elections webpages, or contact the chairs of the units you are interested in, express your interest and ask how you can contribute.

**Why are standards important in libraries?**
Libraries have a long tradition of collaboration. Early on, it was evident that it would benefit not only the library operations to exchange and share bibliographic information, starting with card catalog data but also the users of library collections and services to be able to find what they are looking for in a similar manner across libraries, even if their interactions with a library catalog was within a limited region.

*How did you start your engagement with IFLA and how did you make your path through to become Division H Chair?*

Starting my professional career in libraries as a cataloger in a Greek academic library, where Anglo-American standards were used (some translated into Greek) due to the lack of national cataloging standards, I had a good understanding of international standards and how they may affect practices and the necessary adjustments to meet the local needs. This was my initial motivation to learn more about standardization and eventually to seek opportunities to get involved at different levels and with different organizations. I see myself as a continuing student of knowledge and information organization, wanting to learn about the practices, standards, issues, challenges, and opportunities across the world and along this path to also be able to contribute to the advancement of this area.

In addition to my interest in IFLA’s standardization work, implementation of standards, and teaching cataloging using those standards, my first opportunity to get more directly involved with IFLA standardization was the result of a presentation at an OCLC workshop on metadata standards in libraries and the publishing industry. This led me to join the Working Group for the Functional Requirements for Subject Authority Data (FRSAR) in 2015 and continue as a co-chair and secretary for the WG until the release of FRSAR. Meeting and working with colleagues from across the globe was very satisfying and provided me with wonderful opportunities for further involvement, joining IFLA as an affiliate member, and also being nominated and elected in professional units, including the Functional Requirements for Subject Authority Data (FRSAR) Review Group (2013–2014), Functional Requirements for Bibliographic Records (FRBR) Review Group (2014–2018), Bibliographic Conceptual Models (BCM) Review Group (2018–2021), Subject Analysis and Access (SAA) Standing Committee (2017–2023, Chair, 2019–2023), and now as the Chair of Division Committee H. Throughout this time, I served as a member of Satellite organizing committees, open session program committees, presenting at and moderating open sessions and webinars.

My role as the Chair for a Division is to support the work of the Division’s professional units, advocate and facilitate their work, encourage collaboration, and being a sounding board for
the units and between the units and the Professional Council, which in turn reports to the Governing Board.

*What does a professor in Library and Information Studies (LIS) bring to IFLA’s work, in the domain of metadata standards and in leading IFLA units?*

I see the role of an LIS educator as preparing the future professionals for their entry positions but also to mentor and encourage them to become leaders in their respective fields. Regarding metadata standards, as educators we bring relevant theoretical and practical backgrounds, up-to-date knowledge for current trends and advances, relevant research experience focusing on theories, technologies, best practices, and user experiences, and appropriate teaching and learning approaches. In a way, we tend to look at our areas from a variety of perspectives and bring those into our conversations.

*What does teaching LIS bring to the professional work and vice-versa?*

On the one hand, we know what the challenges are for new professional who are just entering the field of metadata, the skills and knowledge they need. On the other, through research, participation in conferences, professional development, and collaborating with scholars and professionals we can contribute to the future of metadata and metadata standards development. We also teach our students to get involved early on, to seek opportunities to shape the field, and to be innovators. Within the LIS field, cataloging, classification, and indexing have a very long history of standards development and international collaboration. This area is also one with rapid changes, often affected by the technological advances (automated processes, semantic web technologies, artificial intelligence, and more).

In both roles as an educator and as contributor to the work of IFLA units a professor brings this informed view of the needs for standards, how the functions of the metadata and the systems can help or hinder use and users, and how to be open for taking a leap to the future. Discussions and experiences from both environments can inform the other. This dual role is a bridge between teaching and professional work and vice-versa.

*You are active in international librarianship in the domain of metadata standards, with affiliation to IFLA, ISKO. What are the differences? How are these memberships benefiting each other?*
My affiliation to IFLA and International Society for Knowledge Organization (ISKO) is related to knowledge organization, and the commonality between the two is the area of subject knowledge organization systems, such as subject vocabularies, classification systems, implementation, automated indexing, and searching and retrieval.

ISKO is an interdisciplinary society that brings together professionals and scholars from many different fields, such as information science, philosophy, linguistics, computer science, as well as special domains such as medical informatics and knowledge management. One of its goals is to promote research, development and applications of knowledge organization systems that advance the philosophical, psychological and semantic approaches for ordering knowledge.

IFLA has a focus on libraries but covers all aspects of librarianship. My involvement is mostly in metadata standards and subject indexing, classification, and access to information. One of the main differences are that ISKO has a narrower scope but broader range of fields of those involved in it. Another difference is that ISKO promotes research, standards development and their application, and IFLA has more of a focus on developing those standards and their best practices.

These similarities and differences inform each other and provide opportunities for collaborations between the two organizations. For example, several of the IFLA SAA Section members are also members of ISKO. This provides us with many opportunities for collaboration. Recently, ISKO reached out to IFLA SAA to collaborate on its work on Metadata Guidelines for Subject Access. Another collaboration started when IFLA SAA reached out to other relevant organizations, one of them being ISKO, to work on SAA’s Training and Education in Subject Access project.

You have been the Chair of the SAA for four years, you led projects in KOS use in library catalogues and projects, how did these ideas emerge in the Section and what were the outcomes? How do you see this is connected to the development of standards/how such processes inform the development of standards?

The ideas for projects the SAA Section undertakes come from its members and their knowledge of the current trends and needs. For each term, the committee, led by the officers, discuss work of interest to the profession and the Section. As the chair, my role was to facilitate the discussion, consider several factors, and help the committee focus or prioritize projects, develop action plans, formulate subgroups, the working groups, and set timelines and deliverables (the outcomes).
During my two terms as the Chair of SAA, we worked on four projects. The majority of the work is done by a subgroup of the Standing Committee, led by one of its members, and often include expert volunteers from other IFLA units and external organizations. The project with the longest history among them is the Genre/Form project, a collaboration between SAA and the Cataloguing Section. The Automated Subject Analysis and Access and the Training and Education in Subject Access (TESA) projects were initiated during my time in SAA. The newest project started in 2021 and focuses on Knowledge Organization System change and Data Structure (KOS-D). This project started with our discussions on efforts to change subject terminologies or classifications, especially as a response to the criticism of knowledge organization systems and approaches to rectify (mis)representations in these systems and library metadata. This brought us to the questions of what happens to the historical data once a change is implemented, how do we document the need or reasons for the change, who is responsible for such decisions, who is consulted, and what are the editorial processes for controlled vocabulary revisions.

Among the outcomes of these projects include webinars, open sessions at IFLA WLIC, Satellite Meetings, the development and maintenance of a Genre/Form Bibliography, surveys of standards use, processes and practices, contributions to other IFLA standards development and review, and work on Best Practices for documenting changes in subject controlled vocabularies.

You are Chair of Division H, a professional division combining the three IFLA metadata sections and the IT and KM sections and SIGs, what can metadata and IT bring to each other?

As I noted above when describing the mission of ISKO, information and knowledge organization is an interdisciplinary area involving cataloging, bibliography, subject analysis and access (all three being part of the broader metadata domain) and information technologies and services. Therefore, there are many commonalities and opportunities to share expertise among all Division units. In today’s environment metadata standard development, implementation, metadata creation, knowledge management and information access are affected by the availability, functionality, and advances of information technologies. Information technologies can help advance our work and bring these areas into the future of the digital realm. Information technologies bring together not only the metadata aspects but also connect us to resource management, user services, and may affect intellectual property rights, intellectual freedom, and other broader societal issues. Take artificial intelligence (AI) as an example. All metadata areas are affected by AI and the potential AI brings, including standards development, implementing changes in how we represent the world and the misrepresented groups and topics, how knowledge is managed.
in libraries or other information agencies. We need to come together, join our expertise, work on the best uses of AI and ready ourselves to address potential harmful use of AI.

Before becoming a Division Chair, I was interested in the work of other relevant IFLA units, attended their business meetings, events they held, and followed the progress on their standards work and other projects. As the Chair of Division H, I continue to familiarize myself and follow their work. I can also see the interrelated planned work of all Division units, facilitate coordinated efforts and collaborations, and support the units in any way to help them accomplish their goals, navigate the IFLA structure, guidelines, and processes.

The IFLA professional structure provides a plethora of opportunities for collaboration within a division and across all professional, advisory, and regional units. Not only is each Division H unit’s work relevant to the other Division units, it is also very relevant to the Advisory Committee on Standards and its Review Groups, units in other Divisions (such as services to different targeted groups, LGBTQ+ matters, Indigenous matters, LIS education, collections, to name a few), and the broader IFLA strategy and goals.

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**News & Updates**

**IFLA Advisory Committee on Standards Support for the Accessibility Metadata Network Initiative**

Chris Oliver
Expert Advisor, Advisory Committee on Standards

The Advisory Committee on Standards (CoS) agreed at its business meeting in September to support the initiative to create an IFLA Network focused on Accessibility Metadata. It will be one of the sponsoring committees when the proposal goes to the Governing Board for approval. The goal of the network will be to explore and develop a set of international best practices for recording and using accessibility metadata.

At first glance, one might ask why CoS is involved in supporting this network initiative. First of all, one can ask why a network structure is well suited for work on accessibility metadata.

From the *IFLA Handbook*, 13.1.2 on the role, purpose and activities of a network:
Networks collaborate to focus on high interest topics from different perspectives. Through cross-collaboration among Sections, Advisory Committees and Regional Division Committees (who can be possible sponsors) they focus on one topic to achieve defined goals determined by the members of the network. Networks coordinate current activities and fill gaps to fully explore a topic. Also, strategic actions can be developed specifically for cooperation with external bodies for a bigger impact.

Accessibility metadata is an interesting topic because it is an intersection between two domains – library service to persons with disabilities and metadata. Neither domain can advance this work on its own. We need to work together.

Within IFLA, one can see interest in this topic from a broad range of committees. IFLA has two committees concerned with serving persons with special needs, including disabilities.

On the metadata side, IFLA has three separate but closely linked metadata standing committees. In addition, the Review Groups that report to CoS are groups maintaining and developing IFLA metadata standards. Due to the nature of resources that include accessibility features, committees that focus on special resources, such as audiovisual and multimedia resources, also have an interest in this topic.

A network enables collaborative work that reaches not only across sections within the professional structure, but also across structures, such as bringing the professional and advisory structures together for a specific project. What is also crucial is the explicit mention of collaboration with external bodies and experts, not simply at a consultation phase, but rather integrated into the very nature of the network.

Currently, the network initiative has over 50 people and a significant number are not directly involved in IFLA work. But there is huge interest in this work on accessibility metadata outside IFLA as well, and a willingness to work with IFLA on this topic.

CoS has had a long-time interest in enabling the development of a standard related to accessibility metadata and has included this task in their action plan since 2021, under the heading Engagement with Global Processes. It began with the Section on Libraries Serving Persons with Print Disabilities (LPD) reaching out to CoS about the possibility of IFLA exploring the development of a standard for accessibility metadata.

The LPD section has been greatly involved in assisting libraries with the implementation of the Marrakesh Treaty: the 2013 WIPO treaty, Marrakesh Treaty to Facilitate Access to
Published Works for Persons Who Are Blind, Visually Impaired, or Otherwise Print Disabled. One of the challenges for library implementation has been accessibility metadata, either its absence or its inconsistency.

CoS’s involvement in supporting the network initiative dovetails with a long-standing CoS action item to advance this work by bringing together the appropriate mix of experts and helping to advance the development of an internationally useful set of best practices.

CoS looks forward to supporting this network and participating in its work.

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**Plans for ISBD for Manifestation: July 2023 to July 2024**

Renate Behrens  
Chair, ISBD for Manifestation Task Force

The ISBD for Manifestation Task Force has been able to successfully continue its work in recent months and can now present a first draft of the ISBD for Manifestation (ISBDM). As planned, this draft will be the basis for a review process. For this review phase, the Task Force decided to have a step-by-step procedure with the following timing.

**ISBDM Task Force Review**  
*From mid July until October 2023*

Following the extensive development of the ISBDM, the responsible task force conducted an initial review of the draft from July to October 2023. This included a coverage review (check for completeness, consistency, and coherency) and an editorial review (check for typos, shredding consistency, etc.).

**ISBD Review Group Review**  
*Beginning of November until end of December 2023*

As the ISBDM Task Force is a working group of the ISBD Review Group, the review phase began with this group. For this purpose, documents were prepared that firstly explain the background and history of the ISBDM and secondly explain the handling of the ISBDM as an online standard. One aspect of this phase will also be the official approval of the ISBD Review Group for the draft of the ISBDM itself as well as for further planning for the subsequent phases of the review process.
Experts Review
From mid-February until mid-April 2024

This part of the review process will be with metadata experts like ISSN IC, RSC and all relevant IFLA sections. Starting point will be a meeting with the invited experts on 8 February 2024.

Official world-wide Review
From mid-May until mid-July 2024

This review phase will be initiated through information events such as webinars, etc. The first webinar for all interested colleagues before starting this phase is planned for 25 April 2024.

With this comprehensive review process, the ISBDM Task Force wants to ensure that the new online tool ISBDM becomes a sustainable and reliable set of rules for the user communities worldwide and at the same time can be the basis for the expansion to other entities of the LRM.

Following the review phase, the ISBDM will go through the official IFLA approval process and can be published as an IFLA standard.
At its August meeting during the last WLIC, the IFLA Advisory Committee on Standards approved an important update to the *IFLA Standards Procedure Manual*. This achievement contributes significantly to reinforcing the consistency and transparency of IFLA’s standards development and validation processes. It is, therefore, an essential tool for establishing the legitimacy of IFLA’s international standards among their users and other global standards bodies. We understand the importance of transparency in building the necessary consensus and confidence in IFLA and the standards it produces.

This is why the manual emphasizes the special place and role of IFLA standards, which are truly international, freely accessible, and usable.

**The update serves several purposes.**

The first purpose is to align with IFLA’s governance reform. All IFLA professional units can take the initiative in proposing and developing a standard. The guide explains the role of the Advisory Committee on Standards in these processes and includes an appendix containing the forms required for the various stages in the development and validation of a standard. It explains that the Professional Council officially validates standards on behalf of the IFLA Governing Board.

The second purpose is to emphasize the interaction between IFLA and the professional communities and to specify the modalities of this interaction. Scientific, technical, and legal openness helps improve the legitimacy of standards. This technical openness is made possible by the central role of IFLA Namespaces. It is based on the scientific openness of the standards development process, both in the composition of the working groups responsible for it and in the clarification of the review process, which is open to communities outside IFLA.

IFLA standards are not developed in a closed way but in an open way, responding both to the needs of the professional communities and to feedback from the professional communities during initial development, review, and updating processes, all of which are documented here.
The third purpose is to standardize the procedure for developing, validating, and updating standards, the role of IFLA’s professional units, the role and composition of working groups, the consensus decision-making process (which does not imply unanimity according to the ISO definition), the timetable and procedure for updating standards, and the rules applicable to translations. This standardization unifies procedures within IFLA itself within a single framework and, consequently, brings consistency.

The final purpose, and by no means least, is to define what an IFLA standard is. The first part of the manual is devoted to this question.

Finally, I’d like to thank the entire Advisory Committee on Standards working group that worked on this update, and in particular, Megan Price and Chris Oliver, whose work was decisive in bringing the project to a successful conclusion. What remains to be done now is to finalize a summary diagram that will enable all users of the manual to easily grasp this procedure.

The new manual is intended to be an easy-to-use tool, answering questions from all IFLA professional units about their own normative work. The working group hopes that it will become a daily working tool for all IFLA professional units engaged in normative work.

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### Expectations of
**Advisory Committee on Standards Members When Conducting Reviews**

Chris Oliver
Expert Advisor, Advisory Committee on Standards

The *IFLA Standards Procedures Manual* has been newly revised. It details the various steps required to develop a standard and have it approved and endorsed as an IFLA standard. An important step is the evaluation by the Review Team. The Review Team consists of the Chair of Professional Council, the Chair of the Division to which the committee developing the
standard belongs, and the Chair of the Advisory Committee on Standards (CoS), who consults with a group of CoS members. CoS members engaged in a review are assisting in the process of producing useful and effective standards that will bear the IFLA name. From the perspective of CoS members, what are their expectations when they review a draft standard?

It is important to point out that CoS members may not be experts in the domain of the standard, and this can be an advantage. They are putting themselves in the shoes of someone who wants to implement the standard. They are asking themselves questions such as, is it easy to navigate, are new concepts explained well, are terms used consistently.

During the review, CoS members are looking to see that the draft standard has a clear purpose and meets a recognized need. The structure of the document should be logical and consistent. The standard should be international in scope, reflecting IFLA’s global membership. When assessing observance of IFLA’s procedures, an important point is the level of external consultation, both within and outside of IFLA. CoS members also look at the post-endorsement stage, to see if there is a solid communications and promotion plan to ensure that library communities will know about the new standard and implement it. The overriding question throughout the review is whether the standard demonstrates sufficiently high quality to be endorsed and published as an IFLA standard.

IFLA Namespaces
Joseph Hafner
Chair, LIDATEC Review Group
The Linked Data Technical Review Group (LIDATEC), a division of IFLA’s Advisory Committee on Standards, remains dedicated to supporting the implementation of IFLA Standards within the IFLA Namespace.

The current standards encompass:

- **FRBR Vocabularies**
- **ISBD Vocabularies**
- **LRM Vocabularies**
- **UNIMARC Vocabularies**
- **MulDiCat**

This year, our efforts included the development of “Guidelines for Maintaining and Documenting IFLA Standards,” now accessible in the IFLA Repository.

Another significant project involved collaborating with IFLA Review Groups to explore the transition of IFLA Standards into a dynamic online environment, functioning more like a website or wiki rather than static PDF documents. In a pilot initiative, we are partnering with the ISBD Review Group to conduct a trial with ISBDM (ISBD for Manifestations) using the IFLA Namespaces infrastructure. A [pilot site for ISBDM](#) is currently available for review, and we anticipate continued assessment and progress throughout 2024.

If your IFLA Committee wishes to propose an additional standard or establish links to existing IFLA Standards, please don't hesitate to contact me. Feel free to ask any questions, and I am available for discussions on the operational aspects and potential opportunities. You can use the feedback button on the site to reach out.

I invite you to explore the site and familiarize yourself with the standards.

Thank you for the opportunity to update you on this exciting project within the IFLA Namespace.
LRMoo, Navigating Standards Development Processes in Two Communities

Pat Riva, Maja Žumer, and Trond Aalberg
Members, IFLA LRMoo Working Group

During WLIC 2023 in Rotterdam, the Advisory Committee on Standards Open Program focused on the development and consultation processes of international standards. The LRMoo Working Group of the Bibliographic Conceptual Models Review Group (BCM RG) presented on the processes governing the development and approval of LRMoo, as a particular case of joint development between IFLA and the International Council on Museums (ICOM).

LRMoo, the object-oriented formulation of the IFLA Library Reference Model, is, like its predecessor FRBRoo, also a compatible extension to the museum community model, the CIDOC Conceptual Reference Model (CRM), which is an ICOM standard. The approval process for the object-oriented models is a joint process of the two communities. LRMoo requires both IFLA standards approval, as for any other IFLA standard, and approval through the CIDOC CRM Special Interest Group (SIG), which manages the CIDOC CRM family of models within ICOM since 2000.

The SIG meets two to four times per year to discuss and resolve issues relating to CIDOC CRM itself or any of its family of compatible extensions. This includes LRMoo and its forerunner, FRBRoo. Generally, a solution to an issue will be discussed at two meetings before being adopted by a formal vote of those SIG members present. All documentation and summaries of the SIG discussions is available on the SIG website and email list. Adopted changes are integrated into a new release of the relevant model. A new model release is issued after each meeting, even if the text is still considered to have “draft” status.

The other part of the CIDOC CRM process, and this applies only to the CIDOC CRM model itself, not to compatible extensions, is that it also follows the ISO approval process. CIDOC CRM has been endorsed as an official ISO standard, ISO 21127 Information and documentation — A reference ontology for the interchange of cultural heritage information.
Only major releases are submitted to the ISO process through ISO/TC46/SC4 Technical Interoperability. The ISO version was first adopted in 2006, then a major update in 2014 (based on version 5.0.4 of the CIDOC CRM), and the most recent major release, CIDOC CRM 7.1.2 (June 2022), is currently in the ISO approval process at the ISO/DIS (draft information standard) stage.

LRMoo was issued for an IFLA worldwide review in February 2023, until the end of March. The worldwide review was announced on the IFLA website, on IFLA listservs (IFLA-L, metadata sections), other relevant library lists, and also on the CIDOC CRM list. In April, the LRMoo WG analysed the responses received and brought the issues with recommended solutions to the May 9-12, 2023, SIG meeting. The SIG voted to approve the solutions to all of the issues, resulting in a complete draft of LRMoo with no unresolved issues.

At WLIC 2023 this version of LRMoo was discussed at the BCM RG annual business meeting. The RG approved the model, requesting only the addition of a section of recommended mappings using optional classes and properties. The LRMoo WG completed this work and submitted LRMoo version 0.9.6 for CoS standards approval in October 2023. If the review team recommends approval, then the model will be forwarded to the Professional Council for endorsement and publication. LRMoo will then be published both in the IFLA repository and on the CIDOC CRM website.

The CIDOC CRM SIG makes RDF representations of all its models available. A draft RDF of stable release 0.9.6 is the first RDF of LRMoo to be released. In parallel, LRMoo will be added to the IFLA namespace.

The dual approval processes that are inherent in finalizing a standard in two different communities do add steps to the process, which some would say is long enough as it is. However, having the full approval of each community according to its established processes leads to a shared model that is fully integrated into and accepted by both communities.
**Abstract**

The ISBD Review Group has publicly communicated the outcomes of its ISBD aligning revision to the IFLA LRM in a Webinar in January 2023 [1], and in an informational session in WLIC (World Library and Information Congress) 2023 subsequently. Each of the events has presented various aspects and distinctive features of the ISBDM, accounting for its development philosophy and stages, from the Terms of reference through the phased development process to deliver them.

The LRM is central to the concept, design, and delivery of the ISBDM. In 2019, the ISBD Review Group defined the aims of an ISBD Revision “aligning it to the IFLA Library Reference Model (LRM) at the Manifestation entity level”, as a first step to a full implementation of the LRM. Despite the terms of reference for this revision appearing abstract and generic, they entailed the need to deconstruct the ISBD Standard and reconstruct it on new foundations, structural and technological, as required.

Conceptually and structurally, the LRM is a unified model for a complex landscape. Technologically, the entity-relationship modelling of bibliographic data is a shift toward interconnectedness and openness, in terms of data contextualization and linked-data technology. In the development, the ISBD for Manifestation Task Force translated the high-
level goals into tangible objectives and actions, and the LRM conceptual foundations into ISBDM specifications, through a phased development process marked with check-points with the ISBD RG for major decisions.

**The Concept**

A concept note outlining the principles and the technical terms of reference of aligning the ISBD to LRM-Manifestation, and a top-level element set of relationship and attribute elements for an ISBD for Manifestation, constituted the tools of the start-up.

Key to the transformation from the ISBD as a traditional standard to ISBDM that embraces the new agreement on the structure of bibliographic data, was to abandon the concept of mapping between the elements of the ISBD and those of LRM, in favor to the concept of alignment. The top-level set filled-out the top-level framework for interoperability between the ISBD and the LRM, starting from the entities and elements of the LRM, then going granular filling them and extending them with sub-elements. The requirements were to fulfil an ISBDM element set replicating the LRM structure and extending it as required to achieve a description of a Manifestation.

The precondition that all elements should depart from Domain: Manifestation NOT Resource, resolved the dilemma that ISBD ‘Resource’ entity does not map to LRM ‘Res’ but to all WEMI entities at various levels, demystifying relationships between entities of the model. This particularly provided clarity of the entities and the elements and achieved consistency and a structured alignment with LRM. It also provided relationships with the other entities of the full LRM model: Work, Expression, Agent, Nomen, Place, Timespan. The provision of relationships with the other LRM entities not part of the ISBDM, provided a shape capturing the LRM full structure.

The separate sets of elements, “Transcription/Uncontrolled Elements” versus “Recorded/Controlled Elements,” were a strategic move in the development of the ISBDM. In addition to permitting the integration of the key concept of Manifestation Statement with its principle of representation important to the users, it particularly led to enlarging the scope of the ISBD: from a descriptive cataloguing standard to a content standard with access points without prescribing the authorities or subject vocabularies, the standard numbers that should be used.

In addition to working on the practical cataloguing level, providing eligibility for immediate application, the focus on the Manifestation came with extensible provisions. Some elements necessary for the description of a Manifestation but pertaining to other LRM entities like
Expression, were developed as shortcuts, i.e. ISBDM elements combining and integrating a path from Expression to Manifestation (like the “Category of Manifestation” and “Category of embodied Content”) to enable the extensibility of the ISBDM and its easy passage to a full LRM implementation in due course.

The Design

After several iterations, refinements and close study and categorization of the stipulations, an Element Reference Card for each element could be developed, and ISBDM content and structure as a modern, entity-based standard, was taking shape. The components are: LRM entities, Attributes, Relationships, Manifestation Statements, Vocabulary Encoding Schemes, Syntax Encoding Schemes, Metadata Utility, Element Value. The Element Reference Card made each element self-contained for clarity and better understanding featuring its Type, Definition, Scope, Broader/Narrower Elements, Domain/Range, Transcription Rules, and Notes. A “primary assessment” feature was added to aid the pre-recording decisions and guide the cataloguer through which type of resource is being described and what are the elements of its description.

At this stage, the traditional ISBD was complete, and the focus onwards was on developing the ISBDM. The ISBDM features included:

- Flexibility in data elements, allowing for including elements relevant to new resource types beyond traditional formats, like complex digital objects;

- Modular structure, enabling extensions and modifications, to accommodate future needs and technologies;

- Emphasis on relationships, allowing it to express relationships between elements and sub-elements of the Manifestation entity and between Manifestation and other entities, making it adaptable to complex information ecosystems, and activating the principle of data contextualization and resource exploration.

The deployment of works through Task and Finish Groups permitted to balance the flexibility and modularity with a degree of prescriptiveness and to achieve ISBDM predisposition for easy implementation. While focusing on core principles and entity-relationship modelling, the ISBDM was conceived to allow flexibility in the level of detail and specific elements. Creating diverse examples in different languages, either full examples or to illustrate the applications of the different stipulations, are all key to achieving a comprehensive and user-friendly standard.
The Task and Finish Group on “Granularity and Prescription” permitted to complete developments related to:

- Granularity of elements and sub-elements,
- Mandatoriness & repeatability,
- Vocabulary encoding schemes,
- Syntax encoding schemes,
- Notes on each element,
- Notes on handling missing data, transcription issues, and special and complex cases handling.

The Task and Finish Group on Examples permitted developments such as:

- Types and modularity of examples,
- Stipulation examples, different types of elements examples,
- Editorial notes and Complete examples, all in different languages and scripts.

**Integration and Harmonization with IFLA’s and Other Standards**

The ISBDM adoption of the LRM structure and modelling genuinely guaranteed harmonization with other metadata standards. The alignment with the LRM directly maps ISBDM data elements to the core entities and relationships of the LRM, promoting seamless data exchange with standards like RDA (Resource Description and Access). At the bibliographic metadata level, the ISBDM has become closer to and compatible with RDA. At the controlled vocabulary level of Content-Media-Carrier, it adopts the RDA-ONIX Framework for the categorization of resources. At the implemental and applicability level, it is more prescriptive.

Beyond the library field, the alignment to LRM has the potential to open the ISBDM to compatibility with metadata standards of other memory institutions, since the “reference to the IFLA LRM model is also a guarantee of interoperability with other libraries, beyond different implementation choices (shortcuts, etc.) but also with other cultural institutions and professional communities in the field.” (Citing the IFLA LRM model.)

By requiring in the terms of reference of the ISBD–LRM Revision that the new ISBD should integrate with other standards, aiming to achieve complementarity between IFLA bibliographic standards, the ISBD Review Group was again defining high level specs for the ISBDM to be. The ISBD for Manifestation Task Force invested in achieving complementarity and integration between IFLA bibliographic standards at the concrete level. It also took it to a level that, when extended in a full-fledged online environment, will lead to integration
and seamless passage between them. This integration was worked out depending on the hierarchal order of IFLA standards – including the ISBD –, from the top principles of cataloguing to the encoding forms.

- Integration with LRM: The ISBDM is de facto implementing the LRM
- Integration with ICP: the ISBDM is embedding ICP principles in its stipulations, giving notes indicating which elements are reflecting and fulfilling which ICP principle(s).
- Integration with UNIMARC: by closely liaising with the UNIMARC RG, continuously updating them with the latest list of elements of the ISBDM. A working group within the UNIMARC Review Group was established to compile and study the list of ISBDM elements that will be worked out in future updates as new fields and subfields in UNIMARC formats.

The Delivery: ISBDM as an Online Tool

The ISBDM was designed to respond to the delivery of modern bibliographic standards. As the alignment with the LRM model has become one of the key design elements of current non-IFLA bibliographic standards, emerging publishing norms of bibliographic standards have become specifications and requirements to develop the ISBD into a flexible and modular standard.

A departure from the book format, that is no longer appropriate for bibliographic standards publishing, was made possible by investing in the LRM technology-ready structure and the entity-relationship model. The ISBDM Demonstrator [2] has therefore come to serve the ISBDM as an interactive standard enhancing the utility and enabling the interactivity, and fulfilling the requirements of delivery of modern bibliographic standards, in terms of:

- Entities, elements, their attributes, and relationships to other elements value vocabularies used in relation to specific values of attributes, relationships, elements;
- Workflows, providing scenarios to aid navigation of the instructions;
- Support of cataloguing as an exercise in a high-tech inter-connected environment

Its navigation was made simple and easy, and the choice to develop the Examples feature when needed permitted to avoid cluttering the screen and interrupting the reading of the stipulations, adding up to its practicality and its friendliness.

For now, the ISBDM Demonstrator is a standalone tool. However, despite being such, it has demonstrated a model and a new approach for publishing IFLA Standards. Moreover, it demonstrated the applicability and showcased the potential of developing IFLA standards as online toolkits. The ISBDM Demonstrator is a pioneering implementation paving the road
to IFLA standards to follow suit. At its full potential, this will allow integration between IFLA standards at the technological level, enable easy connection between standards in an informing way and supportive way of cataloguing tasks, e.g., connect to format standard (UNIMARC), and use the IFLA namespace to generate content for the ISBDM and other IFLA bibliographic standards.

References


[2] The ISDBM Demonstrator can be accessed here [https://www.iflastandards.info/ISBDM/](https://www.iflastandards.info/ISBDM/), noting that it is still a work in group and is not open yet for the public review phase.

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New Standards & Guidelines

New Standards Endorsed by the Committee in 2023

Ana Stevanović

IFLA Advisory Committee on Standards Member
During 2023 Advisory Committee on Standards worked on reviewing, revising, and approving new guidelines.

IFLA Guidelines for Library Services to Prisoners

In February 2023 IFLA Guidelines for Library Services to Prisoners were published. It is the 4th edition of Guidelines, first published in 1985. This edition was edited by Jane Garner and Lisa Krolak with contributions and support from the working group on Prison Libraries of the IFLA Library Services to People with Special Needs Section. Editors stated that the Guidelines were the result of a collaborative effort made by many colleagues from several countries. Including Preface, 4th version of IFLA Guidelines for Library Services to Prisoners has 6 chapters and is equipped with References, Glossary and Appendix that describes Minimum Standards for Prison Libraries.

The aim of the Guidelines is to provide necessary assistance and guidance for implementation and evaluation of library services in such institutions as prisons. Because of the specific needs of library users in institutions like prisons “the document is intended to serve as a model guide for the development of national guidelines for prison libraries” and is “applicable to all places of incarceration, regardless of the term used to describe the facility” as stated by editors.

The first chapter of the document, “Management,” offers resources on how to organize library management, how to manage the budget and the staff and organize administration, how to design the space, to communicate with potential users and how to promote the use of the library and its materials. Also, it explains methods of evaluation of the service and collaboration with public libraries in the area.
A chapter on “Collection Management” lists general principles and collection standards. This chapter states that it is important to have accurate information about users' needs to improve collection management and its development. Also, prison library should have specific collection management policy to serve as a general guide for the development and evaluation of the collection. They are supposed to have materials like other libraries without censorship. These libraries should also consider interlibrary loans and donations. All materials should be labelled, classified, and catalogued according to the most appropriate means for the library users, and according to staff possibilities. Prisoners should be informed about the library collections and the collections should be evaluated regularly.

Next section, “Services & Programmes,” suggests that every prisoner should be informed about the prison library upon the arrival. It is also crucial for the library to offer additional services such as book clubs, letter writing, family literacy programmes, author visits and readings, etc. Also, cultural programs and family events are welcomed.

The chapter on “Special User Groups” suggest guidelines for different kinds of diversity (ethnics, faith, language), prisoners with low literacy level or political prisoners, also prisoners with special needs and disabilities, different age groups, different gender groups, etc.

Next chapter is entitled “Information Technology,” and authors and editors support use of information technology in prison libraries to the greatest extent possible. Library should work with prisoners on developing or upgrading their digital literacy skills.

As stated by the authors, these guidelines are aimed at librarians, library administrators, prison authorities, legislative and administrative branches of government, and other agencies/authorities that are responsible for administering and funding prison libraries.

Benefits of a prison library are numerous. It is very clear that every country has its specific situation with prisons and there are different kind of prisons and prisoners. But also, there are different kinds of libraries and librarians who are ready to adapt. Library is transformative and it could have a great impact on prisoners and prison staff, and it can be a great support for educational, cultural, rehabilitative programs.

IFLA Guidelines for Library Services to Prisoners
Guidelines for Maintaining and Documenting IFLA Vocabularies

The document was approved in August 2023 and is intended for IFLA review groups in how to maintain and document their standards on the IFLA Namespaces, and to uphold IFLA policies and objectives related to the IFLA standards. Also, standards users will benefit because it will provide them with information about standards and review groups.

These relatively short guidelines are very informative. The document explains what vocabulary is and how to manage one. Detailed information on licensing IFLA standards, access to the vocabularies and all the versions of vocabularies are given. Maintenance (semantic versioning, translations, deprecation) and governance (extension, mapping, translation) are explained. It also contains Appendix with excerpts from the NISO Standards.

The aim was to create clear and genuine guidelines that contain all the necessary information about the processes related to standards, their versions, updates, and releases and to reduce confusion to its minimum.

Invitation to contribute to IFLA Standards Newsletter
Your contributions are welcome and solicited on the following:

- Updates on IFLA standards and guidelines, i.e. new standards, guidelines, endorsements, revisions, versions;

- IFLA standards success stories (IFLA standards and guidelines around the world: stories about use, adoption, translation, implementation projects);

- Regular updates from the Advisory Committee on Standards, Review Groups, LIDATEC, other sections about guidelines, news and activities;

- Reports on relevant activities including, implementation by libraries, institutions, trainings and workshops, alignments, announcements of work to be done, partnerships;

- Reports on meetings, conferences, seminars, webinars;

- Technical articles about various aspects of standards and standardization work;

- Contributions from and about other relevant standards from peers and/or standards organizations;

- IFLA Standards encompass the whole range of technical documents produced by all IFLA professional units, including the conceptual models, the bibliographic standards, the guidelines, the best practices, the kits and the toolkits.

We use the IFLA Publications Guidelines and Style Sheet for this newsletter.

For feedback, questions, or contributions of articles, news, or other items to the Newsletter, contact us:

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Thanks! Merci! شكراً! Хвала!
Ana, Joseph & Rehab
IFLA Advisory Committee on Standards

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