

Action plan 2017 – 2018

Name of Professional Unit: FRBR Review Group

Objectives of the FRBR Review Group 2017-18:

The objectives of the FRBR Review Group are linked primarily to three key initiatives in the IFLA Strategic Plan 2016-2021:

- 1.4 Promoting IFLA standards to support libraries in the provision of services to their communities
- 2.1 Defining a long-term sustainable information environment
- 3.2 Developing standards for the collection and preservation of content in its diverse forms. (Both digital preservation and the collection of content rely on robust metadata).

Objectives of the FRBR Review Group for 2017-2018:

1. To promote IFLA LRM (Library Reference Model)
2. To revise FRBR_{oo} version 2.4
3. To provide expertise/guidance to other IFLA groups as they assess the impact of IFLA LRM on their standards
4. To review the identity and terms of reference of the FRBR Review Group

With the approval of IFLA LRM in August 2017, the FRBR Review Group reached a major milestone. During WLIC 2017, the RG assessed how to proceed and shaped a series of new objectives. These objectives arise from the discussions held in Wroclaw and will probably require at least two years to complete.

Objectives	Project/activity	Tasks	Who/whe	Resources	Communication	Success	Progress
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1. To promote IFLA LRM (Library Reference Model)	1.1 Finish tasks related to the approval of IFLA LRM	1.1.1 Thank CEG and formally declare the completion of the CEG's mandate	All RG -- WLIC 2017 Update website information – September 2017			Updated roster on website	
		1.1.2 Final version of the IFLA Library Reference Model document incorporating small corrections brought to the RG's attention since August 2017	December 2017 Former CEG members			Corrected version of LRM on the website	
	1.2 Promotion and	1.2.1. Update and	1.2.1-1.2.3:	IFLA		Increased	

	dissemination of information	<p>develop LRM web page to provide information , guidance and news</p> <p>1.2.2 Add links to useful documents, such as PowerPoints of presentations, etc.</p> <p>1.2.3 Add LRM news of upcoming presentations, articles, etc.; add links to projects applying LRM or aligning with LRM</p>	<p>Ongoing</p> <p>All members of RG</p> <p>FRBR RG website working group</p>	<p>website editing rights for this WG -- October 2017</p>		<p>information about LRM available through the IFLA website</p>	
	1.3 Monitor and	As translations are					

	coordinate translations of LRM; add links to translations when completed	completed					
	1.4 Impact on standards developed outside IFLA	Provide advice/guidance for alignments, extensions, refinements <ul style="list-style-type: none"> ○ RDA community 	As requests are received	2016/2017 and ongoing	Protocol between the RDA Steering Committee and the FRBR RG Liaison with RDA Steering Committee		
	1.5 Work with the Committee on Standards for their open program at WLIC 2018				WLIC 2018 program		
	1.6 IFLA namespace	Provide support for the Committee on Standards work to establish a	Chair and other members of the RG	Ongoing		IFLA namespace	

		supported infrastructure for IFLA namespaces					
2. To revise FRBR₀₀ version 2.4	2.1 Revise FRBR ₀₀ so that it is in alignment with IFLA LRM	<p>FRBR Review Group decided unanimously that this was an urgent priority during the 1st business meeting at WLIC 2017</p> <p>FRBR₀₀ is a well-known and respected model, but it has now become obsolete because it is based on FRBR/FRAD/FRSAD , and IFLA LRM supersedes these three models</p>				Publication of LRM ₀₀ as an official IFLA standard	
	2.2 Appoint a new working group to develop the third version of FRBR ₀₀	LRM ₀₀ Working Group appointed during WLIC 2017	August 2017 All RG		Listed on Roster at website		

	2.3 Submit standard revision form	Form prepared and submitted	October 2017 LRM ₀₀ Working Group				
	2.4 Submit project funding request	Request submitted with action plan	October 2017 Chair, FRBR RG				
	2.5 Progress reports from the WG	Reports to the Review Group -- Since the work must be done in consultation with the CIDOC CRM Special Interest Group who maintain CIDOC CRM and work with us on FRBR ₀₀ , reports and progress reports are usually timed according to the harmonization meetings hosted	Ongoing through the year; major report for WLIC 2018				

		by the CIDOC CRM SIG.					
	2.6 Consultations and approval of revision	The revision work has just begun. Not before 2019	Not before 2019				
3. To provide expertise/guidance to other IFLA groups as they assess the impact of IFLA LRM on their standards	3.1 Impact on ISBD	<p>Participate in the working group of the ISBD RG which is preparing a proposal for ISBD revision based on an alignment between ISBD and LRM – ISBD seen as an extension or refinement of IFLA LRM, ISBD as an application profile of LRM (covering all ISBD elements)</p> <p>Participate to assist with the interpretation of LRM</p>	<p>Decision at WLIC 2017</p> <p>Ongoing</p>			Well-aligned IFLA bibliographic standards	
	3.2 Impact on the	Group formed by	Decision at				

	International Cataloguing Principles	the Cataloguing Section Participate to assist with the interpretation of LRM	WLIC 2017 Ongoing				
	3.3 Participate in the Cataloguing Section's group on defining what is a standard	Work to be initiated by the Cataloguing Section					
4. To review the identity and terms of reference of the FRBR Review Group	4.1 Name change	4.1.1 Reach consensus within the RG about possible options for a name change 4.1.2 Consult with the Committee on Standards, other IFLA Groups, Sections, etc.	Ongoing FRBR RG -- all After 4.1.1 completed				
	4.2 Prepare revision of the RG's terms of reference for approval		To be done at the same time as name			New terms of reference on the FRBR RG's	

			change is proposed FRBR RG -- all			website	
	4.3 Work with the Committee on Standards on written documentation about the RG's governance		Committee on Standards to initiate the work			Widely available documents describing the RG's governance and procedures	
	4.4 Resolve the inconsistency in the name of the working group that leads harmonization between the CIDOC Conceptual Reference Model and the IFLA conceptual models (currently this committee or group has two different forms of its name)	4.4.1 Prepare a proposal 4.4.2 Update the FRBR RG website and notify the CIDOC CRM Special Interest Group	After the RG name issue is decided Probably 2018-2019		Website information updated	One form of name for the committee	
	4.5 Review all parts	Remove obsolete	FRBR RG			Renewed	

	of the website	information, update information, re-organize the site	Website Working Group – appointed at WLIC 2017 Expected to go on during 2018 and 2019			website	
	4.6 Membership	New members: Contact newly elected members and nominees who were not elected	August 2017			Updated roster	
	4.7 Liaisons	4.7.1 Add liaison with the PRESS ₀₀ Working Group 4.7.2 Add liaison with LIDATEC (if LIDATEC agrees at their September meeting)	Melanie Roche appointed by RG August 2017 Waiting to hear from LIDATEC Possible			Updated roster	

			candidate identified				
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Resource requirements

If you wish to request resources for any of your planned activities, ensure the details above are complete, then copy the project and task details from above and add the necessary detail below.

If you wish to request funds, it is extremely important that you submit the Action Plan to your Division Chair and HQ by the deadline 31 October 2017.

The Professional Committee will discuss during November and agree in the December PC meeting a draft allocation of funds for anticipated reimbursements during 2018. Following confirmation of the level of PC Funds for 2018, the Division Chairs and HQ Professional Support Officer will communicate with Units in January/February to finalise the details. The PC would also appreciate hearing about resource requirements you already anticipate for 2019.

Project or activity and Main task

Project: to revise FRBR_{OO} version 2.4

Main task: to develop LRM_{OO}

FRBR_{OO} version 2.4 is an official IFLA standard approved in 2016.

One of the main purposes of this conceptual model is to promote the interoperability of data between the museum and library communities, “to reach a common view of cultural heritage information through the harmonization of the high-level conceptual models of the library and museum communities.” FRBR_{OO} is also optimized for use in the linked data, semantic web environment.

FRBR_{OO} version 2.4 is based on the IFLA standards FRBR, FRAD, and FRASAD. Since the approval of the IFLA LRM conceptual model in August 2017, these three former models are superseded. To maintain the harmonisation achieved between the IFLA conceptual models and the ICOM CIDOC CRM, it is necessary to revise FRBR_{OO} to take the new IFLA LRM conceptual model fully into account. As the name of the IFLA model has changed, it is proposed to change the name of the harmonised model to match.

The LRM_{OO} model will formulate the concepts in the IFLA LRM using the object-oriented formalism as used in CIDOC CRM. LRM_{OO} will remain a compatible extension of the CIDOC

CRM, permitting cross-domain (museum-library) implementations.

During the first business meeting of the FRBR Review Group, there was an immediate and unanimous decision that the most urgent priority for the Review Group was to begin work on revising FRBR₀₀ so that it reflects the content of the current, approved LRM model.

The form for the revision of a standard has already been submitted to the Committee on Standards. In that document, this time frame was outlined:

As this is part of the harmonisation of models with the museum community, major milestones in the development will take place during joint meetings with the CIDOC CRM SIG.

2017, 6 April: Presentation of LRM and its differences with the FR family models, initial analysis of impact on FRBR₀₀ (see April 6 in the minutes: <http://www.cidoc-crm.org/sites/default/files/minutes%20of%2038th%20meeting%20Crete.pdf>)

2017, 10-12 October: Detailed conceptual review of impact of LRM on FRBR₀₀, assignment of tasks in revising scope notes.

2017, Nov.-Dec.: Preparing drafts of revised scope notes for circulation to CRM SIG.

2018, 15-18 January: Detailed review and framing of scope notes, review of examples, assigning of additional tasks.

2018, Feb.-April: Drafting revisions to other parts of the text, draft of mapping from LRM to revised FRBR₀₀, circulation to CRM SIG.

2018, 22-25 May: Review and refinement of scope notes, examples, introductory text, mapping, etc.

2018, June-Sept.: Editorial consistency checking and formatting, preparing a complete text for IFLA World-Wide Review.

2018, fall: Hold World-Wide Review.

2019, winter: assess impact of WWR

2019, spring: bring proposed modifications back to the CRM SIG for their comment and

	<p>sign-off</p> <p>Relationship to IFLA Strategic Directions: Libraries in Society (initiative 1.4) Information and Knowledge (initiative 2.1) Cultural Heritage (initiative 3.2)</p> <p>Conceptual models are key to the development of content standards which enable user access to content (digital content included). The aspect of collaboration with other information organising communities (such as museums, semantic web) affirms the role of the library profession in this sphere and provides visibility for IFLA.</p>
<p>Resources <i>Do you need specific skills, money or technology?</i> For what do you need resources in relation to this task? Match your needs against the resources listed below*</p>	<p>Funding is requested for members of the LRM₀₀ Working Group.</p> <p>Funding is requested for an in-person meeting between the IFLA and the ICOM delegates: the members of the LRM₀₀ Working Group and the members of the CIDOC CRM Special Interest Group, the only people who can develop a harmonization between IFLA's conceptual model and ICOM's conceptual model.</p> <p>Since FRBR₀₀ is a model that was jointly developed with the museum community, the major decisions about its revision must be made during the joint meetings between FRBR Review Group delegates and the CIDOC CRM Special Interest Group (called Harmonization meetings). Decisions cannot be made unilaterally.</p> <p>CIDOC CRM SIG meets three times per year and its meetings always include FRBR-CRM Harmonization. It is understood that IFLA cannot fully support three meetings a year for the four working group members. The request is for support towards at least one in-person meeting with CIDOC CRM SIG before the summer of 2018.</p>

The funding request is for travel support, accommodation and related expenses for a single 3 to 4 day meeting to be held in first or second quarter of 2018 (either the January (January 15-18) or the May meeting (May 22-25) of the CIDOC CRM SIG) so that decisions and firm progress can be reported during WLIC 2018. The CIDOC CRM SIG meets in Europe. The January meeting is planned for Cologne, but the May meeting will be in Lyon. It will depend how quickly the Working Group is advised of project funding whether they can make arrangements in time for the January meeting.

The work has already begun at the April and October 2017 meetings of the CIDOC CRM SIG and FRBR CRM Harmonization where some members of the WG were able to find funding.

Members of the LRM₀₀ Working Group are already devoting time and their intellectual creativity to the work. It is unrealistic for IFLA standards to be developed by expecting Working Group members to self-fund in order to create an IFLA standard.

Detailed responses:

1.a Need for the meeting and why it cannot be held online:

In-person meetings are essential for this type of complex development work. These are not informational-type of meetings, nor meetings that need simple decisions. It is challenging to harmonize the conceptual views of two different communities, and to debate where concepts are equivalent or where they in fact have completely different meanings. To achieve results, there is a need for active dialogue and in-depth discussion or else the revision will stall.

According to the processes and procedures of the CIDOC CRM Special Interest Group, an online meeting is not a valid meeting at which decisions can be made.

These Harmonization meetings also take place over three to four days, usually from 9 to

18, with people gathered from many places and time zones. Also, at certain points, small groups may break off and work on a particular point, and then come back to the group. Basically, the meeting is more like an ideas laboratory.

1.b Members of the LRM₀₀ Working Group (the WG appointed by the FRBR Review Group):

Mélanie Roche (France)

Pat Riva (Canada)

Patrick Le Bœuf (France)

Maja Žumer (Slovenia)

1.c The meeting will take place in Europe

Either Cologne, January 15-18

Or Lyon May 22-25

1.d. We are asking for partial funding, not full funding. The participants will make up the differences as they can. Three of the participants have already funded their attendance at the Harmonization meeting in October 2017. So it would be unreasonable to expect them to self-fund all meetings related to this revision of an IFLA standard.

3. The CIDOC CRM SIG will provide the infrastructure for the harmonization meetings. They will organize and host the meetings, find appropriate locations, required technology, etc.

<p>Amount of funding. How much money would you like to request from Professional Committee Funds? <i>Explain your rationale for the estimated amount in each case.</i></p>	<p>2,000 Euros</p> <p>Travel, hotel, meals for four people in a European city for three days. It is understood that this is likely to be a low estimate and participants are ready to make up the difference.</p> <p>Based on past experience with a meeting for IFLA LRM development in 2016, this amount would significantly help the participants.</p>
<p>Timing. When would the money need reimbursement? <i>Usually reimbursements are made on production of invoices following completion of the work, however, pre-payment can be arranged in some circumstances</i></p>	<p>After the meeting.</p>

*** Resources**

Use the following list in order to identify what kind of activity needs resourcing and therefore what details the PC will expect to read. If you have other details or requests, do not feel restricted to this list:

1. Project meeting (please note that the PC Funds are extremely limited so physical meetings that need funding are not encouraged unless necessary to move a project forward urgently; please try to conduct discussions online or via telephone conference and coordinate your work online where at all possible) –
 - a. why is the meeting needed and why can it not be conducted online,
 - b. who needs funding (give names),
 - c. where is the meeting planned and when (if known),
 - d. what costs cannot be covered by the project participant themselves (hotel, flight, local travel, subsistence);
2. Publications –
 - a. what document(s) need funding support,
 - b. how many copies need printing, if any,

- c. what services are required, if any (editing, design, proof-reading, etc.),
 - d. delivery of the document (from where, to where, why);
 - 3. Meeting/workshop logistics – (if this is a project team meeting, see above), ensure there are details to describe the meeting appended when you submit this funding request to the PC (how many people are expected, what are the objectives, who are you partnering with, when and where is it anticipated it will take place, who will be the local organiser),
 - a. what logistics need funding (computers, room hire, refreshments, printing),
 - b. what participant costs might need support (travel, accommodation),
 - c. what trainer costs are there (honorarium, travel, accommodation),
 - d. by what other means is the event being funded (participants' own costs, sponsors, etc.). Give details;
 - 4. Webinar –
 - a. What is being planned and with whom,
 - b. Who is the target audience,
 - c. What technical requirements are there;
 - 5. Software –
 - a. What software is required and why;
 - 6. Advocacy materials –
 - a. See the relevant number above (project meeting, publication, webinar, etc.);
 - 7. Other - funding item not covered by the categories above.

Next steps

Please send your completed Action Plan to Joanne Yeomans (joanne.yeomans@ifla.org) and your Division Chair by 31st October 2017.

Questions?

If you have questions or would like help with your Action Plan, please contact Joanne Yeomans (joanne.yeomans@ifla.org) or your Division Chair. We're ready to help.