Agenda Item B.

Society of American Archivists
Council Meeting
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Virtual Meeting/Chicago IL

Regine Heberlein: SAA-RBMS-ARLIS Task Force to Revise the Arts and Rare Materials BIBFRAME Extension (ARM)

(Prepared by: Regine Heberlein)

Regine Heberlein, working with the Standards Committee, is asking Council for support in re-convening a cross-institutional task force that will include members from SAA, Art Libraries Society of North America's Cataloging Advisory Committee (ARLIS), and the Association of College and Research Library's Rare Books and Manuscript Section's Bibliographic Standards Committee (RBMS).

The purpose of the task force is to conduct a second revision of the BIBFRAME-ARM extension in order to make it more compatible with describing materials in aggregate.

BACKGROUND

Arts and Rare Materials (ARM) is a light-weight linked-data ontology that extends the BIBFRAME standard to accommodate the description of archival resources, art, and rare books natively as linked data within the BIBFRAME ontology.

The first version of ARM (v0.1) was developed by LD4P and first released in 2018. It did not model archival description. Its purpose was to extend the generalized BIBFRAME ontology to provide specialized modeling in the domains of art and rare books. It grew out of two separate projects:

- ArtFrame, an ontology extension for the description of two-and three-dimensional artworks led by Columbia University in collaboration with the Art Libraries Society of North America's Cataloging Advisory Committee (ARLIS CAC), the Library of Congress Prints and Photographs Division, The Clark Library, and the Morgan Library & Museum.

- RareMat, an extension for modeling item-level description of rare books not addressed in BIBFRAME, led by Cornell University in collaboration with the ACRL Rare Books and Manuscript Section's Bibliographic Standards Committee (RBMS-BSC)

The current version of ARM was released in 2021 as v1.0 following a two-year revision cycle. The revision was conducted 2019-2021 outside LD4 by a cross-organizational task force jointly appointed by

- the Society of American Archivists' Standards Committee
- the Art Libraries Society of North America's Cataloging Advisory Committee
- the Association of College and Research Library's Rare Books and Manuscript Section's Bibliographic Standards Committee.

The task force was composed of 16 members (5 representatives from each of the participating organizations) and led by Jason Kovari (Cornell University). V1.0 included archival metadata for the first time. It maps collection-level archival metadata to classes and properties for interoperability.

DISCUSSION

Status of ARM and Future Maintenance

ARM is an important part of the rapidly-evolving linked-data landscape. It leverages the extensive existing BIBFRAME infrastructure and, therefore, holds significant promise for moving archival linked data to production.

At this time, ARM is not being actively maintained or further developed. Regine Heberlein has spoken with Jason Kovari, lead of the previous revision cycle, about carrying it forward. He welcomed the prospect of someone taking it on, but has no interest in leading the effort himself.

The LD4 Rare Materials Affinity Group (led by Paloma Graciani Picardo) has expressed its support for a new revision cycle initiated by SAA, and has indicated its interest in maintaining ARM going forward.

ARM vis-á-vis RiC-O

It is important to point out that ARM is not in competition with other emerging linked-data standards for archival description, in particular the just-released RiC suite, but addresses a different use case. Where RiC-O is focused on discovery in an aggregator setting, the focus of ARM is interoperability with BIBFRAME. ARM supports both discovery and operational tasks.

RiC-O is a high-level model that primarily supports aggregator services. It is explicitly intended to facilitate the discovery of *intellectual* archival content. It excels at teasing out nuanced concepts but considers operational modeling of physical description or holdings information (among other things) out of scope.[1] Its defined purpose and modeling choices make RiC-O a standalone ontology whose entities are not always reconcilable with existing domain-adjacent ontologies (including BIBFRAME) or common user tasks.[2]

By contrast, the stated purpose of ARM is to make rare materials metadata interoperable with BIBFRAME, a standard maintained by the Library of Congress that has matured and is built into widely adopted ILS products. ARM makes use of BIBFRAME's extensibility to express domain-specific metadata alongside generalized bibliographic metadata, thereby making good on one of the biggest promises of linked data: to describe related materials across domains within the same data structure. Since BIBFRAME is designed to support user tasks including holdings management and retrieval, ARM also has the added capability of slotting into end-to-end service workflows.

Need for and Purpose of a New Revision Cycle

The latest revision of ARM brought archival description into the scope of ARM for the first time. The work included a comprehensive mapping of archival concepts to ARM classes and properties, focusing on collection-level description and modeling of notes.

Where ARM needs further work is in fleshing out the modeling of aggregates, in particular the way in which intellectual aggregates and their part-of relationships–applicable across domains and a particular mainstay of archival description–are expressed, as well as the ways in which they map onto physical aggregates, their enclosures, and locator information. The work will need to cover three main aspects:

- The first and foundational task of the revision will be to rethink the modeling of bf:Archival (currently as a subclass of bf:Instance) and propose the corresponding revision to the BIBFRAME standard, to allow for aggregate description across domains and aggregates being typed according to their domain.
- In addition, to make ARM fully compatible with aggregate description, further extension of the bf:Item entity is needed such that it will allow for a compound structure capable of expressing the relationship of intellectual to physical aggregates.
- Properties (and their corresponding constraints) need to be defined for the arm:Enclosure entity to allow it to be associated with bf:Item and its subclasses, with identifying

[1] It is worth noting that in this, RiC-O sharply departs from the comprehensive descriptive model inherent in EAD, the current structure standard it seeks to replace, which supports physical description as well as container data and shelf information.

[2] For more comparative detail, also see Regine Heberlein and Ruth Tillman's September 2023 SWIB presentation.

information, and with location information (the latter two are currently defined for bf:Item), respectively.

Practicalities of Managing a New Revision Cycle

To carry out the new revision, we are proposing to follow the tried-and-true cross-institutional model of the v1.0 revision to (again) include and engage the three main stakeholders: the member communities of RBMS, ARLIS, and SAA.

Under that model, the three organizations post a call for volunteers to their member constituency. Each of the three organizations then appoints a delegation of 5 members (with one serving as lead) to serve on the joint task force for a period of 2 years. (The last task force included 16 members; as the organization initiating the new revision cycle, SAA delegates 5 members plus the overall project lead. Regine Heberlein has volunteered to serve as project lead.) SAA Standards recommends the 5 SAA delegates from the pool of SAA volunteers.

RECOMMENDATIONS

We are asking for the support of Council to:

- approve a new ARM revision cycle to be initiated by SAA
- approve that Standards reach out to RBMS and ARLIS counterparts to invite their renewed support and participation and to work with them on timing and wording of the call for volunteers and appointment letters
- post the call for volunteers (and corresponding response mechanism) on the SAA website (see the previous call for volunteers here)
- send official appointment letters to the SAA delegates

Impact on Strategic Priorities:

This item is consistent with the following strategic priority:

- 3.1. Identify the need for new standards, guidelines, and best practices and lead or participate in their development.

Fiscal Impact:

There is no fiscal impact as the task force will carry out its work under the usual all-volunteer parameters.