Removing ISBD Punctuation from MARC Records: the PCC ISBD and MARC Task Group Revised Final Report (2016), a rationale, next steps, and timeline

Rationale:
A fuller rationale for removing ISBD punctuation from MARC records is in the report of the PCC ISBD and MARC Task Group Final Report (2016). In brief, the rationale for removing the ISBD punctuation is that since the ISBD punctuation was designed for the card catalog format, it is now an unnecessary burden within MARC; and that, as we prepare for a post-MARC bibliographic environment, the ISBD punctuation is a hindrance to that transition.

The argument against making the change is a pragmatic one that combines concerns about timing—doing this just at MARC's 'end-of-life' moment—and the potential for labor-intensive disruption in that time. In 2014, it was thought that the impact of the change on our systems before the anticipated migration to linked data and BIBFRAME in 3-5 years would be a double whammy that should be avoided, and we hoped removing the ISBD punctuation could be handled on the conversion of our MARC data to BIBFRAME. But in 2017, the anticipated migration seems at least as far off as it did in 2014: a sure sign that imminence was over-predicted.

Removing the ISBD punctuation would improve MARC as a format for bibliographic data for the duration of the MARC format's use. As noted above, the use of MARC can be reasonably expected to continue far longer than some anticipated in 2014. The benefits of removing ISBD punctuation from MARC records include:

MARC coding can be used alone to designate parts of the bibliographic description, eliminating the redundancy of parallel input of punctuation and MARC coding. Eliminating most punctuation from MARC records simplifies data entry and allows catalogers to focus solely on coding to better identify parts of the bibliographic description. It also allows for flexibility in the design of online displays without the need for suppressing punctuation. Omission of ISBD punctuation in MARC records is routine in other MARC formats used around the world.

MARC 21 will be around for many years with millions of additional records created as libraries slowly move to working with BIBFRAME. With a transition to BIBFRAME, local systems and bibliographic utilities will need the ability to readily map data back and forth, i.e., BIBFRAME to MARC and MARC to BIBFRAME. Those mapping programs would be greatly simplified and more easily maintained if punctuation did not have to be added or removed at the same time. Developing programs now to remove punctuation from MARC 21 will facilitate a transition to BIBFRAME in the future.

Actions:
1. TIMELINE: new start date set to Jan. 1, 2018 for going live with the permission to not use ISBD punctuation; 9-10 months to prepare and adapt.
    a. Phase 1: Now to ALA Annual 2017: Make and distribute record sets for initial preparation testing for impact in local systems, etc.
    b. Phase 2: July 1, 2017-Oct. 1, 2017: Use this preparatory period (3 months) to complete initial testing of record sets in local systems and report on impact. *Initial testing is for non-access points in bibliographic records. Vendors shall be made aware that further testing will address access points and authority records, where applicable.   Furthermore, only records with ISBD punctuation are included in the initial testing. The records do not include coding that needs to be developed by MAC.*
    c. Phase 3: Oct. 1, 2017 to Jan. 1, 2018: Analyze results of testing in local systems, and evaluate responses from system vendors (including any projections they may have regarding development and release of upgrades to accommodate proposed changes). Use this second preparatory period (3 months) to understand or make any local changes necessary to tools, workflows, policies.
    d. Phase 4: Jan. 1, 2018-? Based on analysis of phase 3, develop timeline, revise specifications, plan changes to tools, workflows, policies as necessary. *January 1, 2018 is a "check-in" date to understand the status after hearing from vendors, testers, etc.*
        1. might vendors need to fold punctuation changes into a multi-year development cycle?
        2. Will there be any MAC actions and MARC documentation updates needed?
        3. Confirm assumption that this proposal would ease conversion to linked data.

2. COMMUNICATION: PCC community outreach to stakeholders (i.e. local system vendors: ILMS and discovery tool providers) Goes through all 4 phases.
    a. OCLC will reach out to ILMS vendors
    b. PCC group will also reach out to discovery tool vendors (some overlap between a & b; redundancy OK)
    c. PCC institutional members reach out to vendors as customers
    d. PCC Steering will monitor progress through each phase and chair will report to PoCo and PCC

3. TESTING RECORD SETS: OCLC and LC will create and distribute small record sets for PCC institutional members and vendors to use to test impact of ISBD-punctuation-less records on import, workflow, indexing, sorting, display**,** etc.
    a. OCLC will have some number of pairs of records (with punctuation/without punctuation) --some English, some German--to test by end of phase 1
    b. LC will have some number of pairs of records (with punctuation/without punctuation) to test by end of phase 1
    c. PCC institutions may create pairs of records (with punctuation/without punctuation), too.
    d. PCC institutional members and vendors will report on impact (using the test record sets) at end of phase 2