

Notes from the OCLC Cataloging Community Meeting on 3 June 2022

Access the recordings and presentation slides

Session: Diversity, equity, inclusion

Presenters

- Michelle Cronquist, Special Collections Cataloger, The University of North Carolina at Chapel Hill
- Staci Ross, Director, Cataloging/Metadata Librarian, University of Pittsburg
- Merrilee Proffitt, Senior Manager, OCLC Research Library Partnership, OCLC
- Keila Zaya Ruiz, Sunshine State Digital Network Coordinator, Florida State University

Presentation summary

Michelle Cronquist and Staci Ross co-presented as cataloging coordinators of the African American SACO Funnel and provided an overview on the work done by the group in contributing new and changed Library of Congress Subject Headings (LCSH). Michelle began the presentation with a background on the Funnel and the SACO process. The African American Subject Funnel Project operates under the auspices of the African American Studies Librarians Interest Group (AASLIG) and is part of the SACO (Subject Authority Cooperative) program of the Program for Cooperative Cataloging. The focus of the Funnel is to improve the LCSH terminology through reflection of the African American experience. Membership of the Funnel includes catalogers as well as subject experts from all types of libraries. The SACO program allows libraries to submit proposals for new or changed headings to the Library of Congress. Most of the SACO member libraries that participate in the program are from large academic and specialized libraries. SACO Funnels help in getting smaller libraries involved in SACO by allowing a group of libraries or individual catalogers to join to contribute to the program. Funnels are usually organized around a subject or geographic region. The SACO process consists of contributors submitting proposals for new or changed headings to the Library of Congress (LC). LC staff evaluate the proposals according to policies in the Subject Heading Manual, editorial meetings are held monthly to discuss proposals that are controversial or require more discussion, and proposals not approved are listed on Summary of Decisions with reasoning behind the decision.

The Funnel tries to fill in gaps on topics that are well known and needed to describe the African American experience but are not included in the controlled vocabulary (e.g., *Great Migration* and *Middle Passage*). The Funnel also adds more specific headings (e.g., *Black wall streets*, *African American barbershops*, and *Blackface*) that have been needed by members of the Funnel to describe their collection materials more thoroughly and accurately. In addition to adding new headings, the Funnel has also worked on subject heading proposals for terminology that is out of date such as *Blacks* to *Black people* and *Whites* to *White people* which was brought up by Black members who did not feel represented by these terms. Currently the Funnel is working on a change proposal for *Slaves* to be

Enslaved persons. LC has already approved this, but the Funnel has been looking at other related headings that have the word, "Slave," that should be changed as well before this term change can be implemented. Lastly, the Funnel has also brought up issues in LC classification such as the .N4 Cutter number that contained an out-of-date term. .N4 got changed to the Cutter .B for *Black people*. The Funnel uses various methods for collaboration such as Google Drive, mailing list, monthly meetings, and co-chairs for both cataloging and subject expertise. As the Funnel is a large group there are challenges with collaboration such as reaching a consensus, training people in the Funnel which can be very time-consuming, scope creep where the group can be pulled into a broader diversity, equity, inclusion project which is not focused on their core mission of improving African American subjects, and LC policies can also be problematic in not allowing a subject change or new subject to be added.

Staci Ross discussed one of the large-scale projects the Funnel had recently undertaken, the *Black and White people* change proposal, and how tools such as OCLC Connexion and MarcEdit helped complete this work. Staci explained that creating a proposal to add or change a heading must include the creation of a MARC authority record for the given term or terms and should also include other records which may be affected by the term or terms. Using bibliographic tools can help in obtaining these authority records. If using a public website like LC linked data service, downloading individual records manually can be very time consuming, and there can be errors in searching by not locating all the authorities needed for a proposal. Connexion client -- which is subscription-based bibliographic tool -- can make this process more streamlined. The *Black and White people* change proposal project began with updating the two former base headings, *Blacks* and *Whites* to the pattern established with the term *Racially mixed people*. Initially, the Funnel compiled the list of related terms by searching authorities individually but discovered there were missing records. Searching individually, they had only compiled forty headings, but with the use of Connexion they found one hundred and ninety unique authority records that would be affected by the proposal. Out of those hundred and ninety records it included one hundred and three headings, thirty-five reference records containing base headings for broader terms and narrower terms, and fifty-two validation records which are machine-generated to validate certain headings. The Funnel then reached out to LC (Library of Congress) with these base headings. LC then provided guidance on the process and the types of changes needed for the headings. LC also notified the Funnel that LC would take care of all the validation records.

New and change proposals should begin with searching the authority file. This is especially important for change proposals as you need to ensure that connections between existing authority records do not get broken. Using OCLC Connexion Client you can search for broader and narrower terms and related terms by using keyword or note searches. You can also retrieve records with the scope note containing your search term. These tools enable you to verify if there are other records that will be affected by your projects. In Connexion you can save the authority records in your local save file and export the records to your computer. Once exported you can use MarcEdit to analyze and sort out your file as needed and use export tools to create a spreadsheet of terms. This tool also allows you to display or search on your source file. You can also use regular expressions to search for terms within the authority records of your source file. Finally, once you have the authority records that will need to be modified in MarcEdit, you can export this to Excel through the Export Tab Delimited Records option to share with LC and the rest of the Funnel. You can even select the specific fields you believe that is needed for your project through the Delimited Records option. MarcEdit also helps in identifying the specific validation records which will be updated by LC to submit with your proposal. In MarcEdit you can also draft and review changes and pass them through validation before submitting your proposal to

ClassWeb. MarcEdit allows you to make batch changes to your local records in the file. Staci indicated that anyone could get involved with improving LCSH by joining or starting a SACO Funnel, petition for your institution to join SACO, and reach out to SACO Funnels involved in your topic.

Merrilee Proffitt discussed the Reimagined Descriptive Workflows convening and the recent publication produced from that gathering. The project was undertaken to better understand and address the harm caused by cultural institutions' collections and description practices. The presentation focused on the funded phase of the work, and the report discusses other related work within OCLC Research that has occurred since the gathering. The Reimagined Descriptive Workflows project convened a group of experts, practitioners, and community members to determine ways of improving descriptive practices, tools, infrastructure, and workflows in libraries and archives. The result of the convening allowed for publishing of a community agenda, as well as drawing together insights from related research and operational work that is going on in the field today. One of the major assumptions of the convening is that all institutions hold power to make meaningful choices in this space, and all who work in these institutions share collective responsibility. Part of this assumption is that all of us attending this meeting -- and others who have yet to be invited into the space -- can consider the possibilities for transformation.

The agenda is not a "how-to" guide, but it is constructed to instruct and chart a path forward towards reparative and inclusive description. The community agenda is divided into two parts, the first being the contextual information regarding the project, the convening, and how they created the agenda; it also frames historical, local workflow challenges, and intentions that need to be considered when approaching inclusive and reparative metadata work. The second part of the agenda offers a framework of guidance that suggests actions and exercises that can help frame institutions, local priorities, and areas for change and provides many examples to help inspire additional work. With this being such a huge challenge, the group involved in this work believed that both a level of creative thinking as well as the courage to re-examine existing practices and services in the hope of reducing harm and expanding the circle of inclusivity was the guiding force for the advisors. The three days of the meeting were structured to help build and sustain trust so that people could capitalize on the valuable time spent together.

The framework of guidance demonstrates that descriptive practices represent and reflect library practice; this work is for all of us in libraries and cultural heritage institutions and not catalogers alone. It was also identified that it is vital that organizations hire and retain of people of color, but these are not issues for people of color to solve alone. Allies need to sustain and support the work. Three categories of work were identified in the report that can help gain traction to affect changes: organizational shifts, operational workflows, and professional and personal development. The report provides examples of these categories. Merrilee touched on a few examples for each of these categories, for organizational shifts it's important that ongoing effort, supported by shifts in budget allocation, staffing, and workflows are committed to this work for the long term. For operational workflows having community engagement approaches that are non-extractive, community-centered and stewardship-based. For professional and personal development, it is vital to build strong and multilayered structures of support for people.

Keila Zaya Ruiz participated in the 2021 convening of the Reimagined Descriptive Workflows and presented on how Sunshine State Digital Network (SSDN) provided sessions for the scaling of inclusive description, training, and practices. In 2020 as people were transitioning to remote work during the pandemic, the SSDN held biweekly discussions to find ways to make the transition easier by identifying

ongoing and potential projects and creating community among isolated digital library workers. The forced slowdown and reevaluation of project priorities lead many to want to pursue metadata and description projects as work that could be done remotely with a focus on diversity, equity, and inclusion (DEI). In Fall of 2020 SSDN held a virtual 3-part webinar to introduce staff on the concepts of conscious metadata, editing, and inclusive descriptive practices for digital and archival collections. The webinar series provided practical approaches to metadata work, including how to work directly with communities and offering alternatives to standards and vocabularies that were not as respectful or accurate as they could be. The SSDN metadata working group also produced a resource list referencing literature, thesauri, and projects mentioned in the webinar series. There was a huge response and demand for the workshop series indicating a real need of guidance training and support related to DEI in metadata. During the workshop, questions arose around the isolated nature of description and curation work and how many information professionals are not trained to reach out to communities that they are describing and collecting. This outreach is vital to help prevent harmful and inaccurate metadata. Also, when searching for speakers for the webinar series, the organizers realized that much of his work was being led by well-resourced Ivy league institutions. SSDN wanted to be able to show that this work could also be scaled for other types of organizations.

In the Spring of 2021, SSDN applied for and was awarded a Library Services and Technology Grant through their state library. The grant allowed SSDN to expand on the three-day webinar series that was offered in 2020 and focus on providing tools as well as models for developing ethical and anti-oppressive partnerships with communities and community organizations so that institutions can better integrate the public in metadata work. The workshops will highlight cultural humility, communication, outreach strategies, and how to maintain meaningful relationships with community members and organizations. Besides having sessions with speakers on these topics SSDN also plans to have regional working sessions in North, Central, and South Florida with the intention to bring together collaborators within organizations to discuss their priorities, existing and potential workflows, and actively identify and work through challenges of not just incorporating reparative and inclusive description practices but also how to identify and incorporate community partnerships in their work. Working groups would include various types of roles such as archivists, catalogers, digital curators, and metadata librarians. In addition to bringing people in different roles within an institution together, the working sessions would develop cohorts of support based on job roles. An example of this is connecting a cataloger with digital curator and others doing the same work at their organizations, building a community of practice where those facing similar challenges can consult their contacts and work on solutions together. SSDN hopes that the expanded training will provide the foundation for a new approach to descriptive workflows that are more collaborative and inclusive. It is vital that this training provide flexible and scalable approaches to description work as language and communities change. SSDN plans after the end of the grant period to do an evaluation of the sessions and determine what else is needed to support this important and ongoing work.

URLs mentioned during the event

- Netanel Ganin blog post, Every Occurrence of N4 in the Library of Congress Classification Scheme: <https://inevermetadatadidntlike.wordpress.com/2016/03/25/every-occurrence-of-n4-in-the-library-of-congress-classification-scheme/>
- SACO Funnels: <https://www.loc.gov/aba/pcc/saco/funnels.html>

- Why SACO? Member Benefits and Responsibilities: <https://www.loc.gov/aba/pcc/saco/membership.html>
- PCC SACO Funnel Projects: <https://www.loc.gov/aba/pcc/saco/funnelsaco.html>
- African American Subject Funnel Project: <https://www.loc.gov/aba/pcc/saco/aframerfun.html>
- African American Studies Librarians Interest Group (AASLIG): SACO African American Funnel Project: <https://acrl.libguides.com/c.php?g=761433&p=7312552>
- Equity, Diversity, and Inclusion Initiatives: Reimagine Descriptive Workflows: <https://www.oclc.org/research/areas/community-catalysts/reimagine-descriptive-workflows.html>
- Reimagine Descriptive Workflows: A Community-informed Agenda for Reparative and Inclusive Descriptive Practice (Report): <https://oc.lc/reimagine-workflows-report>
- Library of Congress Subject Heading Approved Monthly Lists: <https://classweb.org/approved-subjects/>
- Cataloging Lab: <https://cataloginglab.org/author/vfox/>
- Reimagine Descriptive Workflows: A Community-Informed Agenda for Reparative and Inclusive Descriptive Practice (PDF version of Report): <https://www.oclc.org/content/dam/research/publications/2022/oclcresearch-reimagine-descriptive-workflows.pdf>
- How to propose a new topical LCSH: https://docs.google.com/document/d/1RyvoHTXRS07y9-bUWLJTaTF_mMNI2Xpl6TQDPnNAdl/edit?usp=sharing
- Contact page for Violet B. Fox: <http://violetbfox.info/contact/>
- Sunshine State Digital Network (SSDN), Introduction to Conscious Editing Series: <https://sunshinestatedigitalnetwork.wordpress.com/2020/09/16/introduction-to-conscious-editing-series/>
- SSDN Metadata Working Group, Inclusive Metadata & Conscious Editing Resources: <https://docs.google.com/document/d/1APavAd1p1f9y1vBUudQlulsYnq56ypzNYJYgDA9RNbU/edit>
- SSDN, Calendar, Upcoming Events, Workshops, and Training: <https://sunshinestatedigitalnetwork.wordpress.com/events/>
- On These Grounds, Slavery and University: <https://www.onthesegrounds.org/s/OTG/page/about>
- Cataloging Lab, List of Alternative Vocabularies: <https://cataloginglab.org/list-of-alternative-vocabularies/>
- Peoples of the Historical Slave Trade, Controlled Vocabularies: <https://docs.enslaved.org/controlledVocabulary/>
- Trans Metadata Collective: <https://transmetadatacollective.org/>
- National Indigenous Knowledge and Language Alliance/Alliance Nationale des Connaissances et des Langues Autochtones (NIKLA-ANCLA): <https://www.nikla-ancla.com/>
- Change the Subject (documentary film): <https://www.library.dartmouth.edu/digital/digital-collections/change-the-subject>

- OCLC Cataloging Community Meeting, 28 January 2022:
<https://www.oclc.org/go/en/events/cataloging-community-meeting/january-2022.html>
- Feedback for Problematic Subject Headings (Responses) : Published Worksheet:
https://docs.google.com/spreadsheets/u/2/d/e/2PACX-1vRWVWIJoSa5lofhQf4G_WKDU0ypaqdkM08UwQic7OSkhi7Yrd9bGLnzJTAKbSyX_kiHxlnjBGksLpDu/pubhtml?gid=679212644&single=true
- Triangle Research Libraries Network (TRLN) Discovery Subject Remapping:
<https://trln.org/resources/subject-remapping/>

Audience questions

PCC has just issued a statement encouraging libraries not to rely solely on Library of Congress headings. What other thesauri would you recommend for African American subject headings?

As a SACO Funnel participant, we work to improve the Library of Congress Subject Headings (LCSH) for African Americans. We are not familiar with other thesauri that you can use for African Americans. There are projects which are starting to work on this, such as On These Grounds (<https://www.onthesegrounds.org/s/OTG/page/about>), which is working on African American history.

I would like to hear more about the choice of “Enslaved persons” over “Enslaved people”. The AP Stylebook flatly states “The word people is preferred to persons in all plural uses.” And The New York Times Manual of Style and Usage now also states “Use people as the plural of person”

Per comments at the LCSH Editorial Meeting about the "Enslaved persons" change proposal: "people" is used for people groups and "persons" is used with headings that have the "Persons" broader term. You use people with groups of people and persons with any heading where the broader term is persons. Therefore, the broader term for slaves currently as it is, is persons, when rephrasing that new heading.

Any best practice insights for surfacing instances of .N cutters throughout the collection, to flip to .B cutters. Is there a thrust to make these retrospective changes, or will there be a tendency toward a "split file" in the stacks?

We have relabeled and continue to do so for our books at the University of Carolina Chapel Hill.

There were also recommendations from the audience on blog posts and workflows you can use to learn more about the changes to these cutters:

- We used this to update all of the outdated .N cutters in our catalog and are moving on to .O6 next (related to Asian Americans)
<https://inevermetadataididntlike.wordpress.com/2016/03/25/every-occurrence-of-n4-in-the-library-of-congress-classification-scheme/>
- For Alma users, Mark Ehlert made a shared Analytics report that can help - /Shared Folders/Community/Reports/Consortia/MNPALS/Resources & Collections, called "Project - .Nx Cutter Tracker (Regex)"
- We identified the materials, created spreadsheets, engaged student workers, and had a cycle of pulling, marking the spreadsheets for what was on the shelf (revising only what we could put our

firsthand), changing the records via MarcEdit, then the students remarked the records, and reshelfed.

Have "slaves" been officially changed to "enslaved persons" because I am not seeing that in LAC?

The Library of Congress has approved it, but no, the change from "Slaves" to "Enslaved persons" is not available in LCSH due to the term being used in other subjects as a broader and related term. It cannot be changed until it is decided what is going to happen with all the other related terms such as the one mentioned in the presentation for Fugitive slaves. This research is still in progress, but it will be changed at some point.

Does HBCU = Historically Black Colleges and Universities?

Yes.

What about the use of "East Indians" in reference to Indians from India and the rest of the world? East Indians does not represent the Indian population spread across the world.

Some work has been done by colleagues at the Library and Archives Canada (LAC) which have worked on including the word Indigenous persons and people to LCSH. If you are interested in this kind of work, you may like to reach out on the listservs and see who is engaged in this right now.

Comment by audience member: TRLN has done subject remapping for East India Indians: <https://bit.ly/trlnsubjects> about the project: <https://trln.org/resources/subject-remapping/>. If no funnel already exists which specifically covers Asian topics, it might be best to get a single individual (optionally with assistants) to do the East India headings. You do not need to be a SACO member or funnel member to submit SACO proposals.

Does anyone know who is changing the North American Indigenous peoples' subject headings? And now that the moratorium has been lifted on new terms in LCDGT, how (and who) goes about proposing new terms for indigenous groups other than the 15 already established?

The Library of Congress is doing some work behind the scenes on looking to replace Indians of North America, but it is a large project, and they are not ready talk about this yet.

Comment by audience member: NIKLA organization is in Canada and are working on a respectful terminology framework regarding Indigenous peoples.

Can you provide examples of defining what is inclusive description?

It is an effort to reframe our practices away from a negative and to a positive, to do our description in a way that is thoughtful and best reflects everyone in our community, not just the majority. In the documentary film, Change the Subject, it provided an example of how words can have an impact on students, and you can see their reactions on how non-inclusive language can affect people. For some people, the impact of language seems neutral, but for others it can be very harmful.

For the SSDN, the way that we are viewing inclusive reparative or conscious description would be to make sure that people can find what they are looking for and connect to it. We want to make sure that our users in our communities can find the resources that relate to them using the language that they use for themselves. Which is why SSDN is focusing training on building community relationships so that

we can better understand how people are describing themselves, and we can reflect that in our cataloging and description.

What is the best way to find out about updated LCSH?

Looking at the LCSH approved monthly lists, you can find it here: <https://classweb.org/approved-subjects/>.

Is there a SACO Funnel or a similar program for changing/updating LGBTQIA+ subject headings?

Audience member comment: Homosaurus is an alternative vocabulary that contains terms for LGBTQIA+.

Where can I access the Reimagine Descriptive Workflows report?

The report can be accessed here: <https://oc.oclc.org/reimagine-workflows-report> or <https://www.oclc.org/content/dam/research/publications/2022/oclcresearch-reimagine-descriptive-workflows.pdf>.

I would like to ask if you have encountered any work on terms for the differently abled, particularly in the context of circus side show performers.

The second session of the SSDN 2020 series included a presenter who did a project related to disability description. Our resource list also has some resources related to that: <https://docs.google.com/document/d/1APavAd1p1f9y1vBUudQlulsYnq56ypzNYJYgDA9RNbU/edit>

Koford, Amelia. "How Disability Studies Scholars Interact with Subject Headings." *Cataloging and Classification Quarterly* 52, no. 4 (2014): 388–411. doi 10.1080/01639374.2014.89128

What are some of the examples why "slaves" has been rejected for "enslaved persons"?

Audience member comment: it is because the word slaves, as a noun, makes that the person's whole being. Enslaved person means that they are still a person, but they have been enslaved. Yes -- slaves describes the person entirely by their state of bondage. Enslaved persons focus more on their humanity. Yes, "people-first" language.