



# OCLC Cataloging Community Meeting

28 January 2022

First session



# Nathan B. Putnam

Director  
Metadata Quality

---

# Welcome

# Today's Schedule



## First sessions

- Welcome
- Diversity, Equity, Inclusion
  - Adrian Williams (U Kentucky)
  - Misty Alvaro (CML)
  - Cynthia Whitacre
- Short break

# Today's Schedule



## First sessions

- Welcome
- Diversity, Equity, Inclusion
  - Adrian Williams (U Kentucky)
  - Misty Alvaro (CML)
  - Cynthia Whitacre
- Short break

## Final sessions

- OCLC Cataloging Update
  - David Whitehair
  - John Chapman
  - Petra Löffel
  - Cindi Blyberg
  - Marcie Burton (UNC Greensboro)
  - Metadata quality staff
- Questions for OCLC
- Closing

# Housekeeping



## WebEx

- If your computer audio is not working, please dial in by phone.
  - Dial-in information has been posted in Chat
- To submit questions, use Chat and send to “Everyone.”
- Note: Your question will be visible to others attending this session.

# Housekeeping



## WebEx

- If your computer audio is not working, please dial in by phone
  - Dial-information has been posted in Chat
- To submit questions, use Chat and send to “Everyone”
  - Note: Your question will be visible to others attending this session

## Post-event

- OCLC will make available:
  - Recordings of each session
  - Slides
  - Notes taken by OCLC staff
- Notifications:
  - Registrants will receive an email via WebEx
  - Messages will be sent to selected listservs
  - OCLC will post links to content:
    - [Cataloging & Metadata](#), [Record Manager](#) and [Collection Manager](#) communities
    - AskQC help [site](#)
    - Post-event webpage (link TBD)

# Session: Diversity, Equity, Inclusion



# Merrilee Proffitt

Senior Manager  
OCLC Research

---

## Introductions





**Adrian Williams**  
Cataloging & Metadata Librarian  
**University of Kentucky**



**Adrian Williams**  
Cataloging & Metadata Librarian  
**University of Kentucky**



**Misty Alvaro**  
Materials Manager  
**Columbus Metropolitan Library**



**Adrian Williams**  
Cataloging & Metadata Librarian  
**University of Kentucky**



**Misty Alvaro**  
Materials Manager  
**Columbus Metropolitan Library**



**Cynthia M. Whitacre**  
Senior Metadata Operations Manager  
**OCLC**

# Using the Homosaurus controlled vocabulary in both OCLC Connexion and in the local catalog



Adrian Williams (they/them)  
Cataloging & Metadata Librarian  
University of Kentucky Libraries  
Adrian.D.Williams@uky.edu

# What is Homosaurus?

- ◇ An international linked data controlled vocabulary focused on LGBTQ+ people and topics
- ◇ Available to search/browse at [homosaurus.org](https://homosaurus.org)
- ◇ MARC source code is HomoIT (Homosaurus International Thesaurus)



# A Brief History of the Vocabulary

1997

- Jack van der Wel develops version 0 of the IHLIA vocabulary for the IHLIA LGBTI Heritage archive. This remains an offline document for several years.



2015-2016

- K. J. Rawson from Digital Transgender Archives begins working with Van der Wel to create an online, linked data version of the Homosaurus. In 2016 an editorial board is established to oversee second major revision of Homosaurus.



2019

- Second major revision completed and released online, made available to use in MARC records with source code HomolT.



2021

- Version 3 of Homosaurus released with alphanumeric URIs.

# Homosaurus' Strengths and Weaknesses

## ◇ Current strengths as an LGBTQ+ vocabulary

- ◇ Endeavors to decenter white, male, cisheteronormativity in its structure.
- ◇ Has a wealth of **culturally-specific** gender and sexual identity terms (such as “Calabai” and “Dee”).
- ◇ Has more granular/specific terms than LCSH.
- ◇ Includes both **current and evolving language** that reflects how people describe themselves, as well as **historical language**.
- ◇ Is continually revised and maintained.

## ◇ Current weaknesses

- ◇ Still limited in selection of terms for **ethnic/national groups** (such as “Arab lesbians” or “French gay communities”), as well as terms across the **asexual** and **aromantic** spectrum.
- ◇ Is still in the process of adding **scope notes** to all of their terms.

# Proof of Concept

- ◇ Proof of concept in February 2020.
- ◇ LCSH “Non-monogamous relationships” ≠ Homosaurus term “Polyamory.”
- ◇ Out of 23 bib records with LCSH “Non-monogamous relationships,” 20 had Homosaurus term “Polyamory” added.
- ◇ Subject search results for “Polyamory” rose from 8 results to 20.

650	_0  a Non-monogamous relationships  y 21st century.
650	_0  a Sex customs  y 21st century.
650	_0  a Interpersonal relations  y 21st century.
650	_7  a Polyamory.  2 homoit



# UK Libraries' Ongoing Enhancement Project

- ◇ Scope: all unsuppressed bibliographic records in our ILS with the LCSH “Sexual minorities.”
- ◇ Some had WorldCat records, a few did not
- ◇ ~400 unsuppressed records
- ◇ Subject analysis performed, HomoIT terms added and original LCSH either kept the same, revised, or removed when inappropriate for the particular work as according to PCC guidelines.

# Subject Assignment with Homosaurus

- ◆ Subject analysis from 505 content note and 520 summary note. Physical item pulled when 505/520 not sufficient.
- ◆ Homosaurus/HomoIT terms added to WorldCat records using Connexion, then exported into UK Libraries' Alma instance.
- ◆ **650 \_7** \$a [*Homosaurus term*]  
\$2 homoit \$1 [*HomoIT URI*]
- ◆ **655 \_7** \$a [*Homosaurus term*]  
\$2 homoit \$1 [*HomoIT URI*]

650	_0  a Gender.
650	_0  a Psychology.
650	_0  a Sexual minorities.
650	_0  a Sociology.

Original LCSH for documentary “Austin Unbound”, about a Deaf trans man’s experience accessing and undergoing gender confirming surgery.

650	_7  a Transgender people.  2 homoit  1 <a href="https://homosaurus.org/v3/homoit0001378">https://homosaurus.org/v3/homoit0001378</a>
650	_7  a LGBTQ+ deaf people.  2 homoit  1 <a href="https://homosaurus.org/v3/homoit0000337">https://homosaurus.org/v3/homoit0000337</a>
650	_7  a Gender confirming surgery.  2 homoit  1 <a href="https://homosaurus.org/v3/homoit0000561">https://homosaurus.org/v3/homoit0000561</a>
650	_7  a Transitioning (Transgender).  2 homoit  1 <a href="https://homosaurus.org/v3/homoit0001465">https://homosaurus.org/v3/homoit0001465</a>

HomoIT terms added to the bib record.

# Next Steps

- ◇ Currently **70%** finished with updated October 2021 report.
- ◇ Investigate more efficient local authority control solutions.
- ◇ Regular communication with reference staff/librarians about searching using HomoIT.

650	0	<a href="#">Gender nonconformity</a> †z <a href="#">Indonesia</a> .
650	0	<a href="#">Gender identity</a> †z <a href="#">Indonesia</a> .
650	0	<a href="#">Sexual minorities</a> †z <a href="#">Indonesia</a> .
650	7	Calalai. †2 homoit †1 <a href="https://homosaurus.org/v3/homoit0000234">https://homosaurus.org/v3/homoit0000234</a>
650	7	Calalai. †2 homoit †1 <a href="https://homosaurus.org/v3/homoit0000235">https://homosaurus.org/v3/homoit0000235</a>
650	7	Bissu. †2 homoit †1 <a href="https://homosaurus.org/v3/homoit0000205">https://homosaurus.org/v3/homoit0000205</a>
650	7	Gender identity. †2 homoit †1 <a href="https://homosaurus.org/v3/homoit0000571">https://homosaurus.org/v3/homoit0000571</a>

Connexion display of LCSH and HomoIT terms for the monograph *Gender diversity in Indonesia : sexuality, Islam and queer selves*. OCLC# 609887329

Thank you!

Adrian Williams (they/them)  
Adrian.D.Williams@uky.edu



# DEI in public library consortia: trusting, collaborating, and thriving

---



Misty Alvaro (they/them)  
Materials Manager, Collection Services  
January 28, 2022

# Public and academic libraries

- Funding sources
- Priorities
- Customers
- Types of materials
- Staff, expertise, training, experience vary widely  
...just like they do everywhere else

# Areas for improvement

- Subject terminology
  - Change the Subject
  - LGBTQIA+
  - Indigenous peoples
  - Othering
- Who is doing the work and why?
- Public spaces: are we welcoming everyone?
- Organizational culture: how do we communicate our values?
- Staffing concerns: inclusive recruitment and tokenism

# Implementing change in your consortium

...make it a way of life



# Barriers

- Time and energy
- Administrative support
- Communication
- Cultural differences
- Limits of library systems

# Foundations

- Build relationships
- Participate
- Start small
- Consortium documentation?
- Set goals for completion
- **Be flexible**

# Assess your barriers

## and take your time

# Building a case

- Research and prepare
- Identify stakeholders, allies, representatives
- Collaborate on proposals
- Confirm feasibility
- Meet your partners where they are
- **Test, test, test**

# Why, though?!



# Presenting your change

- Confirm support from your leadership team
- Gather input from smaller groups and work up
- Present to peers in consortium
- Assess support from consortium leadership
- Implement locally and share
- “Please don’t delete this!”

# Feedback

- Keep communication flowing
- Schedule checks of progress, function
- Propose addition to consortium documentation
- Share upward
- Reward participation
- Ongoing assessment
- Keep those allies!

I love answering questions!



**[malvaro@columbuslibrary.org](mailto:malvaro@columbuslibrary.org)**



OCLC Cataloging Community Meeting | 28 January 2022

# OCLC Metadata DEI

**Cynthia M. Whitacre**

Senior Metadata Operations Manager, OCLC

---

# BIBLIOGRAPHIC CHANGES

---

# Connexion Client Macros & LCSH

- Periodic searching ensures that we have eliminated offensive terms that are no longer part of LCSH
- Some headings automatically convert as part of global controlling based on 4xx cross-references, for example:

**650 \_0 Gypsies \$z Germany >> 650 \_0 Romanies \$z Germany**

- Some headings do not exist as 4xx cross-references and are deleted, for example:

**650 \_0 Yellow peril >> [deleted entirely]**

# Obsolete Subject Headings

We have built some changes into the macro we use for corrections. Examples:

**650 \_0 Aged >> 650 \_0 Older people**

**650 \_0 Cripples >> 650 \_0 People with disabilities**

**650 \_0 Handicapped children >> 650 \_0 Children with disabilities**

# More examples of LCSH changes

**650 \_0 Mentally retarded >> 650 \_0 People with mental disabilities**

**650 \_0 Socially handicapped >> 650 \_0 People with social disabilities**

# Illegal aliens change

650 \_0 Aliens >> 650 \_0 Non-citizens

650 \_0 Illegal aliens >> 650 \_0 Non-citizens **AND**  
650 \_0 Illegal immigration

# Library & Archives Canada

Actual Canadian Subject Headings (CSH)	New CSH changes
<b>\$aCanadian literature (English)\$xNative authors</b>	\$aCanadian literature (English)\$xIndigenous authors
<b>\$aCanadian literature (French)\$xNative authors</b>	\$aCanadian literature (French)\$xIndigenous authors
<b>\$aCanadian literature\$xNative authors</b>	\$aCanadian literature\$xIndigenous authors
<b>\$aCanadian poetry (English)\$xNative authors</b>	\$aCanadian poetry (English)\$xIndigenous authors
<b>\$aCanadian poetry (French)\$xNative authors</b>	\$aCanadian poetry (French)\$xIndigenous authors
<b>\$aElders (Native peoples)\$zCanada</b>	\$aIndigenous Elders\$zCanada
<b>\$aNative peoples\$zCanada\$xResidential schools</b>	\$aIndigenous peoples\$zCanada\$xResidential schools
<b>\$aCanada\$xArmed Forces\$xNative peoples</b>	\$aCanada\$xArmed Forces\$xIndigenous

# Further Subject Heading Work

- Encourage use of other vocabularies, such as *Homosaurus*
- Encourage submission of new and revised headings for LCSH through SACO  
<https://www.loc.gov/aba/pcc/saco/index.html>
- Keeping FAST up to date with LCSH changes
- FAST Policy & Outreach Committee is forming a SACO funnel to help with submission



# Open access coding for e-resources

- MARC 856 (where the URI resides) has a fairly new subfield 7 to code whether the URI leads to an open access resource (or not)
- Current project underway in Metadata Quality to retrospectively code this subfield in 856 fields in WorldCat
- Coding has been added to 2.5 million records to date
- Hopefully that will increase discoverability for end users

# Revising OCLC terminology

- Renamed the Master Record -- now the WorldCat record
  - Software changes made in Connexion Browser and Connexion Client 3.0
  - Documentation changes made in BFAS and elsewhere
- Renamed Master Mode (authorization level) -- now Quality Mode
  - Software changes made in Connexion Browser and Connexion Client 3.0

---

# DDC DEVELOPMENTS

---

# User-run advisory committee

- First committee dates to 1916; reorganized in 1953 as joint committee of ALA, LC, and Forest Press (now ALA and OCLC) – Editorial Policy Committee (EPC)
- 10 members, currently from 6 countries
  - ALA, Europe, and UK have dedicated seats
  - Australia, Canada, and South Africa are traditionally represented
- Democratizes the process, and helps with bias in some ways, but there are limits

# Recent efforts

- Leverage OCLC's cooperative model
- Allows participation by any interested user
- EPC still plays an important role
- Varying tasks based on user interest
  - Public posting of proposals
  - Volunteer review of draft and completed proposals
  - User-created proposals
  - User work in Editorial Support System (ESS)

# DEI advancements to be proud of

- Increased input from Africa, Asia, South America
- Specific improvements to Dewey
  - Option to classify first by Indigenous group
  - Witchcraft as religion, not just “occult”
  - Modernizing treatment of LGBTQ+ people (also Two-Spirit, asexual)
  - Traditional medicine
- Anything that lets users get hands-on is a win!

# Editor-in-residence program

- Temporary position to bring in expertise on specific topics, especially related to DEI issues
- Program began in January 2022 with initial 6-month term
- Kelly West, earning MLIS from Louisiana State University
  - ARL Kaleidoscope Program Diversity Scholar
  - ALA Spectrum Scholar

---

# OUTREACH

---



# Discussions with member libraries

- 2 amazing panels at Cataloging Community meetings
  - January 2021: Incorporating subject headings for indigenous peoples/First Nations
  - June 2021: Diversity, Equity and Inclusion in Metadata
    - a panel discussion
- Reimagining Descriptive Workflows -- Mellon Grant  
<https://oc.lc/reimagine-workflows>

# External involvement

- Program for Cooperative Cataloging (PCC) DEI Advisory Committee
- Discussions with the ALA Core Big Heads group
- Discussions with OhioLink
- Desire to collaborate with member libraries on a metadata DEI project to improve WorldCat
  - Share comments or ideas either at email [askqc@oclc.org](mailto:askqc@oclc.org) OR within the Cataloging community in the OCLC Community Center

# DEI work continues

- Small steps do add up
- Commitment to the work
- Real change



[This Photo](#) by Unknown Author is licensed under [CC BY](#)

# Thank you!

Cynthia M. Whitacre

[whitacrc@oclc.org](mailto:whitacrc@oclc.org)

[AskQC@oclc.org](mailto:AskQC@oclc.org)

**Because  
what is  
known must  
be shared.®**



**Adrian Williams**

[Adrian.D.Williams@uky.edu](mailto:Adrian.D.Williams@uky.edu)



**Misty Alvaro**

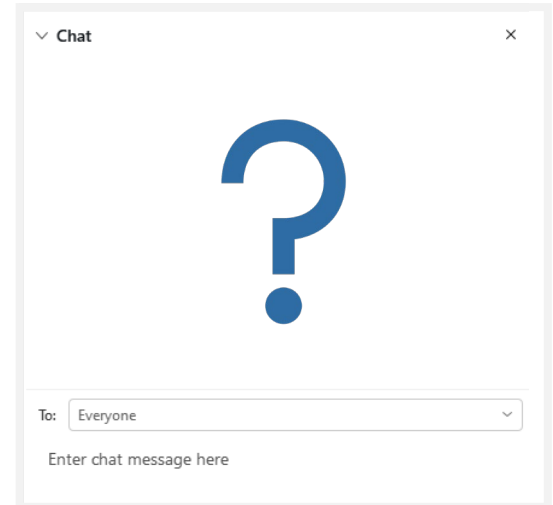
[malvaro@columbuslibrary.org](mailto:malvaro@columbuslibrary.org)



**Cynthia M. Whitacre**

[whitacrc@oclc.org](mailto:whitacrc@oclc.org)

Submit questions in Chat.  
Send chat to **“Everyone”**



# BREAK

