OCLC Cataloging Community Meeting
28 January 2022

First session
Welcome
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
  o David Whitehair
  o John Chapman
  o Petra Löffel
  o Cindi Blyberg
  o Marcie Burton (UNC Greensboro)
  o Metadata quality staff
• Questions for OCLC
• Closing
WebEx

• If your computer audio is not working, please dial in by phone.
  o 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.
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)

Housekeeping

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Session: Diversity, Equity, Inclusion
Merrilee Proffitt
Senior Manager
OCLC Research

Introductions
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
- 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 HomoIT.

2021
• Version 3 of Homosaurus released with alphanumeric URIs.

Homosaurus.org
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.
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    | 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 | https://homosaurus.org/v3/homoit0001378 |
| 650    | 7     | a LGBTQ+ deaf people. | 2 | homoit | 1 | https://homosaurus.org/v3/homoit0000337 |
| 650    | 7     | a Gender confirming surgery. | 2 | homoit | 1 | https://homosaurus.org/v3/homoit0000561 |
| 650    | 7     | a Transitioning (Transgender). | 2 | homoit | 1 | https://homosaurus.org/v3/homoit0001465 |

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.
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
OCLC Cataloging Community Meeting | 28 January 2022

OCLC Metadata DEI

Cynthia M. Whitacre
Senior Metadata Operations Manager, OCLC
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

<table>
<thead>
<tr>
<th>Actual Canadian Subject Headings (CSH)</th>
<th>New CSH changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>$a$Canadian literature (English)$x$Native authors</td>
<td>$a$Canadian literature (English)$x$Indigenous authors</td>
</tr>
<tr>
<td>$a$Canadian literature (French)$x$Native authors</td>
<td>$a$Canadian literature (French)$x$Indigenous authors</td>
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<td>$a$Canadian poetry (English)$x$Native authors</td>
<td>$a$Canadian poetry (English)$x$Indigenous authors</td>
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<tr>
<td>$a$Canadian poetry (French)$x$Native authors</td>
<td>$a$Canadian poetry (French)$x$Indigenous authors</td>
</tr>
<tr>
<td>$a$Elders (Native peoples)$z$Canada</td>
<td>$a$Indigenous Elders$z$Canada</td>
</tr>
<tr>
<td>$a$Native peoples$z$Canada$x$Residential schools</td>
<td>$a$Indigenous peoples$z$Canada$x$Residential schools</td>
</tr>
<tr>
<td>$a$Canada$x$Armed Forces$x$Native peoples</td>
<td>$a$Canada$x$Armed Forces$x$Indigenous</td>
</tr>
</tbody>
</table>
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
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 OR within the Cataloging community in the OCLC Community Center
DEI work continues

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

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Thank you!

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