OCLC cataloging community meeting

3 JUNE 2022
Welcome
Today’s schedule

First session

• Welcome

• Diversity, equity, inclusion
  o Michelle Cronquist (UNCCH)
  o Staci Ross (U Pittsburgh)
  o Merrilee Proffitt (OCLC)
  o Keila Zayas Ruiz (FSU)

• Short break
Today’s schedule

First session

• Welcome
• Diversity, equity, inclusion
  o Michelle Cronquist (UNCCH)
  o Staci Ross (U Pittsburgh)
  o Merrilee Proffitt (OCLC)
  o Keila Zayas Ruiz (FSU)
• Short break

Final session

• OCLC cataloging update
  o David Whitehair
  o Denise Sandell (Wilson College)
  o Anne Washington
  o Cindi Blyberg
• OCLC metadata quality update
  o Robin Six
  o Shanna Griffith
• 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
  o Dial-in information has been posted in Chat
• To submit questions, use Chat and send to “Everyone”
  o Note: Your question will be visible to others attending this session

Post-event

OCLC will make available:
  o Recordings of each session
  o Slides
  o Notes taken by OCLC staff

Notifications:
  o Registrants will receive an email via WebEx
  o Messages will be sent to selected listservs
  o OCLC will post links to content:
    Cataloging & Metadata, Record Manager and Collection Manager communities
    AskQC help site
Diversity, equity, inclusion
Cynthia Whitacre
Senior Metadata Operations Manager
Presenters

Michelle Cronquist
Special Collections Cataloger
The University of North Carolina at Chapel Hill

Staci Ross
Cataloging/Metadata Librarian
University of Pittsburgh
COLLABORATION, SUCCESSES, AND CHALLENGES IN THE AFRICAN AMERICAN SACO FUNNEL

MICHELLE CRONQUIST
SPECIAL COLLECTIONS CATALOGER
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

STACI ROSS
CATALOGING/METADATA LIBRARIAN
UNIVERSITY OF PITTSBURGH

OCLC CATALOGING COMMUNITY MEETING | JUNE 3, 2022
OVERVIEW

- Background on the Funnel and the SACO process
- Collaboration in the Funnel
- Successes and challenges in our work
- Major projects using OCLC
AFRICAN AMERICAN SUBJECT FUNNEL PROJECT

- Established in 2000 under the auspices of African American Studies Librarians Interest Group (AASLIG), part of ACRL
- Part of the SACO (Subject Authority Cooperative) program of the Program for Cooperative Cataloging, run by the Library of Congress
- Focuses on improving Library of Congress Subject Headings (LCSH) terminology reflecting the African American experience
- Members include catalogers and subject experts, from academic, public, and special libraries
SACO (SUBJECT AUTHORITY COOPERATIVE) PROGRAM

- Allows member libraries to submit proposals for new or changed headings to the Library of Congress
- Includes LCSH and other Library of Congress vocabularies such as LCGFT (Library of Congress Genre/Form Terms)
- Most SACO member libraries are large academic libraries and specialized libraries
SACO FUNNELS

- Group of libraries (or individual catalogers) who have joined together to contribute to the SACO program
- Organized around subject matter (e.g., Judaica Funnel) or geographically (e.g., Northern New England)
SACO PROCESS (BRIEF OVERVIEW)

- Contributors submit proposals for new or changed headings to the Library of Congress
- Library of Congress staff evaluate proposals according to policies and practices in the Subject Headings Manual
- Editorial meeting is held monthly to discuss proposals that are controversial or require more discussion
- Proposals not approved are listed on Summary of Decisions with reasoning behind the decision
SELECT NEW HEADING PROPOSALS FROM THE AFRICAN AMERICAN SACO FUNNEL

- Great Migration, ca. 1914-ca. 1970
- Middle Passage
- Black wall streets
- African American barbershops
- Blackface
CHANGE PROPOSALS FROM THE AFRICAN AMERICAN SACO FUNNEL

- Blacks → Black people, Whites → White people
- Slaves → Enslaved persons
- LC Classification: .N4 cutter (Negroes) → .B cutter (Black people)
COLLABORATION

● Traditionally, SACO is a solitary process
● Within the Funnel
  ○ Collaborative editing of proposals
  ○ Google Drive
  ○ Monthly meetings
  ○ Working meetings as needed
  ○ Email list
  ○ Cataloging co-chairs and subject co-chairs
  ○ Subgroups for bylaws and outreach
COLLABORATION

- With outside contributors
  - Slaves → Enslaved persons (Rowena Griem, Yale University)
  - African American universities and colleges → Historically Black colleges and universities

- With the Library of Congress
  - Monthly editorial meetings
  - Large-scale change proposals
CHALLENGES

- Reaching consensus
- Training
- Scope creep
- Library of Congress policies
USING TOOLS FOR LARGE PROJECTS
USING TOOLS TO PREPARE PROPOSALS

- Ideal for small- and large-scale projects
- Querying public sites is time-consuming
- Individual queries leave room for error
BLACK/WHITE PEOPLE CHANGE PROPOSAL PROJECT

- Base headings: Blacks and Whites
- 190 records were updated
  - 103 headings
  - 35 reference records containing base headings in BTs or RTs
  - 52 validation records
- Reached out to LC early in the process
SAMPLE RECORD

150  \$aUrban blacks  << Heading (150)

550  \$wg$aBlacks  << Broader term (550 $w g)

550  \$wg$aCity dwellers

670  \$aWork cat.: From TB to AIDS : epidemics among urban Blacks since 1900, 1991.

680  \$iHere are entered works on blacks living in urban areas in countries other than the United States. This heading may be divided geographically by names of individual regions, countries, provinces, etc. Works on blacks living in individual cities, city regions, or metropolitan areas in countries other than the United States are entered under the heading $aBlacks$i with the appropriate geographic subdivision.  << Scope note (680)
SAMPLE VALIDATION RECORD

150  \$aWorld War, 1914-1918$xBcakes$zMali

667  \$aRecord generated for validation purposes.

670  \$aWork cat.: Kamian, Bakari. Des tranchées de Verdun à l'église Saint-Bernard, c2001
SEARCHING LC AUTHORITIES IN CONNEXION

- Broader, Narrower, or Related Terms (BTs, NTs, and RTs)
- Headings with similar variants (4xxs)
- Scope notes (680s) containing heading (using keyword search)
- Verify if there are other authority records affected by the change
SEARCHING LC AUTHORITIES FOR "BLACKS" AND "WHITES"

Revealed need to sort out:

- Children’s (CYAC) headings
- Geographic headings (MARC 151)
- Reference headings
SAVING AUTHORITY RECORDS IN CONNEXION

- Select the records you want to save
- Save records to your local authority save file
EXPORTING AUTHORITY RECORDS FROM CONNEXION

- Export records using the export button (check your settings before exporting!)
- Exports include the entire authority record except 9xx fields
USING MARCEDIT FOR CHANGE PROPOSALS

- Extract/Delete headings not be changed
- Export a spreadsheet or list of terms
EXTRACTING RECORDS WITH MARCEDIT
CREATING LISTS OF TERMS WITH MARCEDIT
FINAL STEPS

● Identify validation records (to be updated by LC)
● Draft changes to MARC authority records
● Make batch changes to local records (still must be entered individually)
HOW TO GET INVOLVED WITH IMPROVING LCSH

● Join/Start a SACO Funnel
● Petition for your institution to join SACO
● Reach out to SACO Funnels involved in your topic
● Ask questions :)
THANK YOU!

Michelle Cronquist: cronquim@email.unc.edu

Staci Ross: str51@pitt.edu

African American Subject Funnel Project:

https://www.loc.gov/aba/pcc/saco/aframerfun.html

and

https://acrl.libguides.com/c.php?g=761433&p=7312552
Presenters

Merrilee Proffitt
Senior Manager, Senior Manager, OCLC
Research Library Partnership
OCLC

Keila Zayas Ruiz
Sunshine State Digital Network Coordinator
Florida State University
A vision for anti-racist and reparative description practices
I live and work on the unceded traditional land of the Chochenyo Ohlone people, and am grateful to the past and present leaders for their stewardship of this land.
The Reimagine Descriptive Workflows Project

• Convening of experts and practitioners

• Published output “community agenda”
  • Contextual information
  • A framework of guidance

• Undertaken with the guidance of an advisory board
Why is this needed?

- More inclusive descriptive data drives a more inclusive discovery experience.
- The community of library and archival practitioners, and other stewards of metadata are falling short of our goals to be inclusive and welcoming to all.
What it means to “radically reimagine”

• **Reimagine** bring a level of creativity and problem-solving to address the challenge of transforming current descriptive practice, infrastructure, and its supporting community of practice.

• **Radical** examine foundational, systemic changes needed to transform the profession at its core.
Advisory board

- Prioritized areas of focus
- Identified how work should be structured
- Provided feedback and guided drafts
Goals for three days spent together

• Create a safe space to share and connect honestly as humans
• Lay the foundations for relationship building and repair
• Building a basis for reciprocal relationships between communities and centers of power
• Inspire radical thinking to rebuild a more just metadata infrastructure
• Start building a concrete roadmap for change in the sector and keep conversation going
Framework of guidance

• Descriptive practice reflects library practice.
• Solutions rely on organizations and individuals (at all levels) changing practice and culture.
• This is not a set of problems for catalogers (alone) to solve
• This is not a set of problems for people of color (alone) to solve.
Framework of guidance

**Organizational shifts** Changes at the institutional and organizational level in terms of restructuring priorities, budgets, and staffing that require investment from leadership.

**Operational workflows** Changes needed in day-to-day practice. These changes require support from institutional policy, priorities, and funding. Organizational leadership needs to support mid-level managers and practitioners in implementation.

**Professional and personal development** Investment in education and mind-shift. This work is for everyone in the organization, regardless of role, and must be ongoing.
Organizational shifts

Changes at the institutional and organizational level in terms of restructuring priorities, budgets, and staffing that require investment from leadership.

Commit to the long game

Ongoing effort, supported by shifts in budget allocation, staffing, workflows. This shift is best achieved when it is supported by a critical mass of institutions throughout the ecosystem.
The Reckoning Initiative at the University Libraries

The University Libraries’ Reckoning Initiative represents a commitment to go beyond a mere focus on diversity and instead to use equity, inclusion and social justice as a lens for all our work. This page points to a selection of current and recent Reckoning projects at the University Libraries, as well as news and updates related to the initiative. Learn more by reading the Library’s full Reckoning Initiative Framework.

Projects

21-Day Racial Equity Challenge

Racial equity syllabus focused on libraries and archives. Developed for our staff’s internal 21-day racial equity challenge, but with broad relevance for library and archival work.

Campus Monuments and Buildings

Resources, research guides, and exhibits related to the history and controversy of Carolina’s built environment, including the 1913 Confederate monument.

Community-Driven Archives

Mellon-grant-funded project to support historically underrepresented history keepers in telling, sharing, and preserving their stories.
Operational workflows

Changes needed in day-to-day practice. These changes require support from institutional policy, priorities, and funding. Organizational leadership needs to support mid-level managers and practitioners in implementation.

Promote respectful, reciprocal, community codesign
Community engagement approaches that are non-extractive, community centered, and stewardship based.
Framework of guidance

Professional and personal development Investment in education and mind-shift. This work is for everyone in the organization, regardless of role, and must be ongoing.

Create systems of support Build strong and multilayered structures of support for people. Mentoring is needed. Recognition, buy-in, and funding from organizations and individuals with power and influence at all levels are critical.
Thank you

I look forward to discussion!

Merrilee Proffitt
Senior Manager
proffitm@oclc.org
Scaling Inclusive Description
Training and Practices

Keila Zayas Ruiz
Sunshine State Digital Network Coordinator
June 03, 2022
Background

- SSDN is the DPLA hub for Florida
- In 2020 we held a series of discussions about remote work
- Metadata and description projects became a priority as work that could be done remotely
- Desire to incorporate DEI
Laying a Foundation

- Fall 2020, 3-part webinar series and resource list
  - Presenters included Dorothy Berry, Jessica Tai, Holly Smith, Itza Carbajal, Meghan Rinn, Kelly Bolding, Laura Hart, and Betts Coup
  - Part one introduced the general principles of inclusive description
  - Part two presented case studies from four organizations
  - Part three presented planning tools and strategies for inclusive description projects
  - How can this work be scaled to different types of organizations?
Expansion

• 2021 applied for and received a LSTA grant from the state library to expand training in this area
• Focus on training professionals on ethical and anti-oppressive partnership building
Building Community and Relationships

- Collaborative working sessions
- Provide time and space for organizations to discuss priorities, workflows, and challenges
- Build cohorts of support
Just the beginning

• This work is ongoing and iterative
• Continue to evaluate and try to meet needs of our professional community
Resources

Fall 2020 Series: https://sunshinestatedigitalnetwork.wordpress.com/2020/09/16/introduction-to-conscious-editing-series/

Resource List: https://docs.google.com/document/d/1APavAd1p1f9y1vBUudQlULsYnq56ypzNYJYgDA9RNbU/edit?usp=sharing

Upcoming events: https://sunshinestatedigitalnetwork.wordpress.com/events/
Questions?

Send comments and questions in chat to “Everyone.”

A vision for anti-racist and reparative description practices
Merrilee Proffitt

Scaling Inclusive Description Training and Practices
Keila Zayas Ruiz
Sunshine State Digital Network Coordinator
June 03, 2022

#OCLCcataloging