Less Talk, More Action: Adventures in Inclusive Metadata

October 11, 2023
Heidy Berthoud, Cataloging Policy Specialist, Policy, Training, and Cooperative Programs Division, Library of Congress

Cynthia M. Whitacre, Senior Metadata Operations Manager, OCLC

Jill Annitto, Head of Metadata and Editorial Operations at Atla
Questions

- Use the chat box for any questions, comments, and technical difficulties. Q&A allows for anonymous questions.

- We will have time at the end of the presentation for our presenters to answer questions. Please hold all questions until then.
Don’t forget to register for the final webinar in this series, taking place on November 2!

More info available on our website
Less talk, more action
Adventures in inclusive metadata
In the beginning, there were 84,000 words
A case for clean-up

Jill Annitto
Head of Metadata and Editorial Operations, Atla
jannitto@atla.com
Beat the bloat

In 2019 Atla’s Metadata Team began editing the thesaurus with an eye toward (mostly) faceting the topical and geographic terms. Many terms were single-use or low-use.

Terms were reviewed for currency, redundancy, relevance to our scope, accuracy and usage.

<table>
<thead>
<tr>
<th>Week</th>
<th>Analyst</th>
<th>Topic</th>
<th>Topic</th>
<th>Topic</th>
<th>Topic</th>
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<tbody>
<tr>
<td>11-Oct</td>
<td>1</td>
<td>Philosophy</td>
<td>God</td>
<td>Mythology</td>
<td>History</td>
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<tr>
<td>18-Oct</td>
<td>2</td>
<td>Liturgy</td>
<td>Christian* sheet 1</td>
<td></td>
<td></td>
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<tr>
<td>25-Oct</td>
<td>3</td>
<td>Theology</td>
<td>Christian* sheet 2</td>
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<td></td>
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<td>4</td>
<td>Catholic</td>
<td>Mass</td>
<td></td>
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<tr>
<td>8-Nov</td>
<td>5</td>
<td>XYZ Americans</td>
<td>General sheet 1</td>
<td>Black+</td>
<td></td>
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<tr>
<td>15-Nov</td>
<td>6</td>
<td>Islam</td>
<td>General sheet 2</td>
<td></td>
<td></td>
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<tr>
<td>22-Nov</td>
<td>7</td>
<td>Eastern Christianity</td>
<td>General sheet 3</td>
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<tr>
<td>29-Nov</td>
<td>8</td>
<td>Pastoral</td>
<td>Christian* sheet 3</td>
<td></td>
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<tr>
<td>6-Dec</td>
<td>1</td>
<td>Law and Labor</td>
<td>LGBTQ</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13-Dec</td>
<td>3</td>
<td>Holidays</td>
<td>Protestants</td>
<td></td>
<td></td>
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</tbody>
</table>

Atla has the advantage of not relying on bibliographic record-sharing and therefore has the freedom to deviate from Library of Congress Subject Headings (LCSH).

<table>
<thead>
<tr>
<th>Sep-2019</th>
<th>Topics: 83,916</th>
<th>Average use per term: 39.5</th>
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<tbody>
<tr>
<td></td>
<td>Geos: 17,449</td>
<td>Average use: 17.9</td>
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<tr>
<th>May-2020</th>
<th>Topics: 50,879</th>
<th>Average use: 71.7</th>
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<tbody>
<tr>
<td></td>
<td>Geos: 9,440</td>
<td>Average use: 48.1</td>
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<thead>
<tr>
<th>Nov-2021</th>
<th>Topics: 25,618</th>
<th>Average use: 154</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Geos: 2,536</td>
<td>Average use: 184</td>
</tr>
</tbody>
</table>
Low-hanging fruit
(but know your audience)

Starting with low-hanging fruit, these types of terms were appended by state or country names:

- Abortion--Law and legislation
- Assisted suicide--Law and legislation
- Educational law and legislation
- Educational vouchers--Law and legislation

The geographic subdivisions were dropped and added as an additional term in the record:
- Abortion--Law and legislation--Italy

Geographic headings were standardized and cleaved of their topical subdivisions:
- Bengal--Religion
- Bengal (India)
- Religion

Generalized headings on antiquities were split:
- Egypt--Antiquities, Islamic
- Egypt
- Islamic antiquities

We did not split specific Biblical archeology sites:
- Egypt--Antiquities--Tell el-Kedwa
Breaking out **temporal headings** means better filtering on time periods, especially as they relate to a specific geography or historical treatment of a topic:

China--History--1937-1945
   China
   History
   Sino-Japanese War, 1937-1945

Papacy—History--1309-1378
   Papacy—History
   1309-1378*

**Wars, eras, dynasties** were faceted
United States--History--Revolution, 1775-1783
   American Revolution (United States : 1775-1783)

China--History--Tang dynasty, 618-907
   Tang Dynasty (China)

Many **corporate name headings** were redundant with low usage.

Terms matching the following syntax were changed similarly:
Church of England--Clergy--Supply and demand
   Church of England--Clergy
   Clergy--Supply and demand

   Church of England--Clergy--Salaries, Etc.
   Church of England--Clergy
   Clergy--Salaries, pensions

**For consideration: Catholic Church—Geo headings**
Linguistic and grammatical terms

Atla indexes several journals that focus on the treatment of language and the following types of terms were split into their components.

For these types of terms, splitting the headings into parts has made finding articles about obscure languages much easier.

- Avestan language—Grammar
  Avestan language
  Grammar, Comparative and general
- Eblaite language—Lexicography
  Eblaite language
  Lexicography

Terms in foreign languages, critical to finding articles about such treatments, remain unchanged.

- Akkadian language--Terms—Atmu
- Hebrew language--Terms—Pishti
Inaccurate and nonrepresentative terms

- Indians of North America
  Indigenous peoples of North America

- Circle--Religious aspects--Indian religion
  Circle--Religious aspects
  Indigenous peoples—Religion
  (Indigenous people name)

- Hymns, Amerindian
  Hymns, Indigenous
  Indigenous peoples of North America

- Folk literature, Indian
  Indigenous peoples—Literature

- Indians as mascots

Tribal names were edited to remove the term “Indians”
  Mataco Indians → Mataco (South American people)

Use of the emic term rather than the “commonly” used term
  Dakota rather than Sioux
  Ojibwe rather than Chippewa

Added the broader term/s to each bibliographic record carrying the narrower term when available
  Sotho (African people) + Bantu-speaking peoples
  Inuit + Arctic peoples
  Garifuna (Caribbean people) + Indigenous peoples of the West Indies + Indigenous peoples of Central America

Blog series on inclusive subject headings at Atla
Collaboration

**Mormons → Latter Day Saints**
In 2022 Atla was lucky enough to work with the FAST Funnel, a group of cataloging specialists at LC, and experts in the field of Mormon and Latter Day Saint studies, including librarians at BYU, to change the term Mormons to Latter day Saints.

While Atla suggested the change, BYU librarians did the heavy lifting to get this term and its cascading terms prepped for the change which came in July 2023.

This experience was encouraging and invigorating!

**Cults → New Religious Movements**
Atla strongly believes that the use of the term Cult as a descriptor for new religious movements is not representative of how those groups are studied or self-identify.

In 2021 Atla began to use both terms (Cults and New religious movements) on records to facilitate retrieval.

Atla is currently working with a group of librarians on submitting this change to the Library of Congress.
Faceted Application of Subject Terminology (FAST)

- FAST Policy and Outreach Committee (FPOC)
- Learn more about FAST, faceted application of subject terminology.
- FAST Quick Guide
- FAST Funnel
- Submit new/revised terms through OCLC FAST program to LC using this form.
DEI & OCLC Metadata

Cynthia M. Whitacre
Senior Metadata Operations Manager
OCLC Membership & Research Division
What is OCLC doing about DEI & Metadata?

- Virtual presentation and panels
- Research publication
- Changing terminology
- Updating subject headings
- Working in partnership with member libraries

Presentations

- DEI metadata panels at virtual OCLC Cataloging Community meetings
  - Featuring SACO funnels (African American funnel, Latin American & Indigenous Peoples funnel, Gender & Sexuality funnel)
  - Changing derogatory geographic names
  - Local subject headings in Discovery layers
  - Alternate subject vocabularies (Homosaurus)
  - Local projects (Columbia University Rare Books “Mrs” project, Florida’s Digital Public Library of America, etc.)

Recorded presentations

- Virtual AskQC Office Hours (Available at oc.lc\askqc)
  - July 2023 Topic: Debiasing Dewey: Righting the past by rewriting the classification
  - August 2023 Topic: Rapid Harm Reduction with Locally Preferred Subjects in WorldCat Discovery
Published Report

2022 Report: Reimagine Descriptive Workflows: a community-informed agenda for reparative and inclusive descriptive practice

Report on the 2021 convening
Sponsored by the Andrew W. Mellon Foundation
Words Matter

• In 2021 OCLC changed terminology to use *WorldCat records* instead of the insensitive term *Master records*
Implement LCSH changes

• Timely implementation
• Controlled heading changes
• Manual changes
  – Most recent example:
    **Slaves** became **Enslaved persons**
    30,591 WorldCat records changed April 2023
    13,096 WorldCat records changed May 2023
    Work is ongoing as records are added to WorldCat

Photo by [Chris Lawton](https://unsplash.com) on Unsplash
Partner with Libraries

- University of British Columbia
  - Change outdated Canadian subject headings (CSH) in WorldCat records to new more inclusive LCSH. Examples:

    Deleted CSH: $a Native art $z Canada
    New LCSH:    $a Indigenous art $z Canada

    Deleted CSH: $a Native peoples $z Canada
    New LCSH:    $a Indigenous peoples $z Canada

The image is licensed under the Creative Commons Attribution-Share Alike 3.0 Unported license. Photo by Wolfgang Sauber.
Cynthia M. Whitacre
Senior Metadata Operations Manager
OCLC Membership & Research Division
whitacrc@oclc.org
Because what is known must be shared.

Do you have ideas for improving DEI in WorldCat metadata? Contact us (askqc@oclc.org)

Cynthia M. Whitacre
whitacrc@oclc.org
A revised classification for Ukraine: Update on work at the Library of Congress

Heidy Berthoud, Cataloging Policy Specialist, Policy, Training, and Cooperative Programs Division
Meet the project team

- **Heidy Berthoud**, Cataloging Policy Specialist, Policy, Training, and Cooperative Programs Division (PTCP)

- **Jurij Dobczansky**, Librarian, East Central Europe Section, Germanic and Slavic (G&S) Division

- **Christine Korytnyk Dulaney**, Chief, G&S Division
1. We were very surprised and outraged to see the presence of 2 quasi-formations “Donetskaia Narodnaia Respublika” and “Luganskaia Narodnaia Respublika” in the ciphers responsible for the administrative units of Ukraine. According to the Constitution of Ukraine (Articles 132-133), Donets’ka oblast’ and Luhans’ka oblast’ are part of the territory of Ukraine (there are no so-called DNR and LNR).

2. The code in the "history" section - Ukraine Conflict, 2014 - is also a cause for concern. This is not a completely correct term that does not reflect a number of important events, such as the Revolution of Dignity, the annexation of Crimea, and the russian-ukrainian war. Since February 24, 2022, martial law was officially introduced in Ukraine by presidential decree, and the war (not a conflict) continues.

Email from Oksana Mykytyn, Director of the Ukrainian Catholic University (UCU) Library, and the UCU Library team to the Policy, Training, and Cooperative Programs (PTCP) Division at the Library of Congress, January 30, 2023 (capitalization and emphasis retained from original email)
Timeline of DK development

1916
- **DK Russia**
- DK508 Ukraine (Little Russia, Ruthenia)

1959
- 2nd edition
- **DK Russia. Poland. Finland. Russia in Asia**
- DK508.8 Ukraine (Little Russia, Ruthenia)—History—By period—1917-

1972-1976
- Slavic and East European Subject Headings and Classification Committee (SEESHAC)
- DJK Eastern Europe (General)
- Classification for Poland expanded

1987
- 3rd edition
- **DK Soviet Union. Poland**
- Extensive expansion of Ukrainian classification introduced on List 223 (1986)

2001
- **DK Russia. Soviet Union. Former Soviet Republics. Poland**
# Ukraine—De facto jurisdictions under Russian sponsorship

| KKY2935.C45 | Vinnys'ka oblast' |
| KKY2935.C46 | Volyn'ska oblast' |
| KKY2935.C47 | Zakarpats'ka oblast' |
| KKY2935.D54 | Zaporiz'ka oblast' |
| KKY2935.D66 | ZHytomyrs'ka oblast' |
| KKY2935.I73 | De facto jurisdictions under Russian sponsorship |
| KKY2935.K33 | Crimea | TABLE KJ-KKZ4 |
| KKY2935.K44 | Previously Krymskaia oblast' |
| KKY2935.K56 | Donetskaia Narodnaia Respublika | TABLE KJ-KKZ4 |
| KKY2935.K64 | Luganskaia Narodnaia Respublika | TABLE KJ-KKZ4 |
| KKY2935.K67 | Galicia see KKP4900-4909 |
| KKY2935.K68 | Cities, communities, etc. |
| KKY2935.K74 |  |
| KKY2935.L56 |  |
| KKY2935.L64 |  |
| KKY2935.M95 |  |
| KKY2935.O75 |  |
| KKY2935.P65 |  |
| KKY2935.R86 |  |
| KKY2935.S36 |  |
| KKY2935.T47 |  |
| KKY2935.V56 |  |
| KKY2935.V65 |  |
| KKY2935.Z35 |  |
| KKY2935.Z37 |  |
| KKY2935.Z55 |  |

**Autonomous republics**
- Crimea | Table KJ-KKZ4
- Previously Krymskaia oblast' |  
- Donetskaia Narodnaia Respublika | Table KJ-KKZ4
- Luganskaia Narodnaia Respublika | Table KJ-KKZ4
- Galicia see KKP4900-4909
- Cities, communities, etc.
Revised classification for Ukraine

Move Ukraine from DK508 to **DK5001-DK5995**

**Important changes:**
- Closes out existing open span of 1991- with 2014
- Creates new span for 2014-
- Creates new classification numbers for the Russo-Ukrainian War
- Expands local classification for Ukrainian cities, with new spans for Kharkiv, L'viv, and Odesa
- Removes names used by various empires and replaces them with Ukrainian names

*LC will not reclassify cataloged materials.*

Back cover image of The Kobzar of Ukraine, by Taras Shevchenko.
## Periodization for Ukrainian history

**DK508:**

- Early to 1340
- (does not exist as a separate span)
- 1340-1569. Period of Polish-Lithuanian domination
- 1569-1648. Period of Polish rule
- 1648-1775
- 1775-1917

**Revised classification:**

- **Early to 1199**
- 1340-1569. Crown of the Kingdom of Poland. Grand Duchy of Lithuania
- 1569-1648. Polish-Lithuanian Commonwealth
- 1775-1917. Austrian and Russian Imperial rule

*We recommend that classification for Kyivan Rus’ be revised and moved from DK to DJK.*
20th century Ukrainian history

DK508: Revised classification:

Each subdivision of history will now have specific numbers for Sources and Documents; Historiography; General works; Social life and customs. Civilization. Intellectual life; Political history. Politics and government; and Diplomatic history. Foreign and general relations

DK508.832 1917-1921. Period of independence

1917-1921. Period of independence.
General works
Other topics, A-Z

(does not exist in current classification)

1945-1991

Ukrainian resistance movement, including Ukrainian dissidents

General works
By group, A-Z
# 21st century Ukrainian history

<table>
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<tr>
<th>DK508:</th>
<th>Revised classification:</th>
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<tr>
<td></td>
<td>Political history. Politics and</td>
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<td>government</td>
</tr>
<tr>
<td></td>
<td>General works</td>
</tr>
<tr>
<td></td>
<td>Orange Revolution.</td>
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<tr>
<td></td>
<td>Pomarancheva revoliutsiia</td>
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<td><strong>2014-</strong></td>
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<tr>
<td>DK508.852 Ukraine Conflict, 2014-</td>
<td><strong>Russo-Ukrainian War, 2014-</strong></td>
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<tr>
<td></td>
<td>with detailed classification</td>
</tr>
<tr>
<td></td>
<td>based on classification for</td>
</tr>
<tr>
<td></td>
<td>World War II (D731-D838) and</td>
</tr>
<tr>
<td></td>
<td>the Spanish Civil War (DP269)</td>
</tr>
<tr>
<td>Local history begins at DK508.9</td>
<td>Span for 2014- currently ends at DK5513, with</td>
</tr>
<tr>
<td></td>
<td>local history beginning at DK5850, leaving over</td>
</tr>
<tr>
<td></td>
<td>300 intervening numbers for expansion</td>
</tr>
</tbody>
</table>
Local history

Cities with spans:

Kyïv

Kharkiv *(new to revised classification)*

L’viv *(new to revised classification)*

Odesa *(new to revised classification)*

Each of these has a span of 20 numbers.

*Sunflowers in Donetsk. Photo by Aleksandr Eremin.*
Progress and next steps

✓ Share expanded classification with Policy Specialists in PTCP (5/8/23)
✓ Share expanded classification with colleagues at the Ukrainian Catholic University (5/31/23)
✓ Share plan for expanded classification with Slavic cataloging community (6/8/23)
✓ Share expanded classification with Library of Congress Administrators (6/16/23)
✓ Share plan for expanded classification with the broader library community at ALA Annual panel presentation, “Less talk, more action: Adventures in inclusive metadata” (6/24/23)
✓ Share detailed expanded classification with Slavic cataloging community at LC/SCMC webinar (7/18/23)
✓ Share plan for expanded classification with the broader library community at Atla webinar, “Less talk, more action: Adventures in
Long term recommendations

- **With cooperation of PTCP and G&S Divisions:**
  - Move classification for Kyivan Rus’ out of DK and into DJK (*part of the original SEESHAC plan of 1974*)
  - Create revised classification for Belarus (at DK2001-DK2995) and Moldova (at DK3001-DK3995)
  - Move classification for Lithuania, Latvia, and Estonia out of DK and into DL (*part of the original SEESHAC plan of 1974*)
  - Possibly rename DJK; rename DL History of Northern Europe. Scandinavia. The Baltics

- **With cooperation of PTCP, G&S, and Asia and Middle Eastern (ASME) Divisions:**
  - Move classification for Armenia, Azerbaijan, and Georgia out of DK and into a newly defined area of DS, possibly DSA The Caucasus (*original SEESHAC plan had elements of this*)
  - Move classification for Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan out of DK and into a newly defined area of DS, possibly DSB Central Asia
  - Revision of regional numbers remaining in DK and revision of
Thank you!  
Дякую!

Questions or comments:

Heidy: hberthoud@loc.gov

Special list for Ukraine:

https://classweb.org/tentative-subjects/2310a.html

Editorial meeting: Oct. 20

To attend, email policy@loc.gov by Oct. 13