**Session Summary**

**Theme: Workflow Adapts to DEI Cataloging or ILS Migration**

**Time:**June 26, Sunday, 4-5:00PM EDT, 2022  
**Location:** Washington Convention Center, 150B

**Repairing the Catalog: Implementing DEI to Cataloging and Authority Work**

The DEI value has profoundly impacted the practices in cataloging and metadata work in libraries. To make the bibliographic and authority records DEI compliant and promote inclusive metadata has been a hot topic in the library community. This discussion focused on what DEI work has been done in different institutions, how DEI practices impact the library’s workflows and what the possible blockers to DEI effort are. It was led by Whitney Buccicone, Director of Discovery Services at the University of Virginia Library and co-facilitated by one of the IG Co-Chairs due to the large turnout.

Buccicone first asked participants to discuss the steps they have already taken to apply DEI and reparative work to resource description practices. The participants started with changing the term “Illegal alien” in library catalogs and discovery systems. Several participants talked about specific examples of implementing local heading changes in their library systems. Central Michigan University, which uses Alma and Primo, indicated that they still maintained local headings. Washington Research Library Consortium talked about their approaches: first, to set up an indication rule in Alma for the local heading changes and later also to rely on an indication rule set up in Primo, which allows the display of the desired headings. Additionally in Alma, they turned on and ran a Preferred Term Correction (PTC) script to automatically update subject terms in bibliographic records based on the LC authority files. Carleton College also reported on including a special MARC 9XX field coded in bibliographic records to first run an Alma indication rule and then a Primo indication rule to display the local heading of “Undocumented immigrants.” In November 2021, LC announced that it would replace “Illegal aliens” with two paired terms: “Noncitizens” and “Illegal immigration” (ALA, 2022). This decision has impacted libraries’ workflows and some of their workarounds. For instance, Carleton no longer needs to utilize the special MARC 9XX field in the bibliographic record and update the display in Primo using indication rules. It is just not substantial anymore. Washington Research Library Consortium still uses their local practice, but they allow their members to choose if this local subject heading should display or not. Presently, Central Michigan University still maintains their local authority files.

Regarding other reparative projects that libraries are working on, one librarian mentioned that they are replacing the term “Indians of North America” with “Indigenous People in North America.” Another librarian said that there are about 4,000 subject headings concerning the tribes. Other librarians commented that it will be a daunting task to evaluate, change and apply these terms in systems. One librarian also shared that the opinions of the members of the community matter, which was strongly agreed upon by the participants. From the discussion, it seems that although there is confusion about how to do reparative work, this work has been happening at all levels and at all different sizes of institutions.

When the participants were asked if they document their workflows for reparative metadata work, several librarians replied that they did. One said that they document all the steps taken. Another librarian said that they have all the updated terms as well as old terms in a spreadsheet, so the terms can be referred to when needed.

Inclusive metadata and reparative editing for digital collections was also discussed. One librarian shared the reparative metadata projects panel organized by the Sunshine State Digital Network (SSDN, 2022). She shared that the ATTK Museum, a museum of Seminole culture and history located on the Big Cypress Indian Reservation in Hendry County, Florida, improved their descriptions in catalog records for 19th century newspapers as well as for digital collections. The University of Central Florida Libraries performed an audit of their juvenile biographies for gender, race, ethnicity, and nationality in the Curriculum Materials Center, and added local subject headings, Library of Congress Demographic Group Terms (LCDGT) and Homosaurus terms to their catalog records. The Florida State University Libraries performed computational analysis of the digital collections in NVivo as well as manual analysis, created a “priority list” for collections that need re-description, documented their workflow, and wrote harmful content statement and inclusive editing guidelines. They summarized a few approaches to repairing the metadata, such as using less neutral phrasing, providing context for description, and using precise names. Other librarians echoed similar approaches. Some said that they added statements acknowledging that biases may exist in materials and finding aids descriptions. The University of Virginia Library looked at their own history and focused on changing terms related to the Thomas Jefferson collection. For example, they replaced “slavery” with “enslavement.” They also looked at terms on indigenous people. They created a staff survey and plan to launch another survey for faculty members asking for desired term changes.

Finally, Buccicone asked what blockers libraries have encountered in DEI cataloging. Participants mentioned factors such as time constraints, how to determine priorities in changing the subjects, and collaboration among different departments in a library. One librarian recommended assessing user needs, while another suggested getting feedback from public services. Conduct a pilot project before performing large scale changes was also recommended by some librarians.

**Migration Surprises: Workflows and Lessons Learned after Migration**

The second roundtable discussion topic was “Migration Surprises: Workflows and Lessons Learned after Migration” by Jennifer Eustis and Meghan Bergin, both at the University of Massachusetts Amherst (UMA) Libraries. Many ILS systems are coming to their end-of-life, and vendors are providing less support for older systems. This is leading libraries to make decisions to migrate to a new library services platform (LSP). Migration requires new workflows, workarounds, and new ways of approaching how librarians do their work at institutional as well as consortium levels. The facilitators shared their experiences of migrating to the open-source library services platform FOLIO at UMA and their consortium. The roundtable participants then had an open discussion about various aspects of a system migration, such as training and documentation, metadata cleanup, and lessons learned during the process.

The facilitators began the discussion by asking how many at the table had recently undergone, or were planning for, an ILS migration. Many of the participants had been through a migration, but several participants either were about to undergo one or were still in the information-gathering phase. Of those that had migrated, the LSPs mentioned were Alma, OCLC Wise, Sierra, Symphony, and FOLIO. A participant from LC announced that LC plans to migrate to a new platform with support for BIBFRAME. Since the solicitation is still out for bid, however, the name of the vendor or platform is yet unknown.

The discussion moved on to positive and negatives of LSPs. Vendors tend to focus more on the front end to ensure positive end-user experiences. For instance, Sierra was noted for its excellent searching functionality. Participants seemed overall satisfied with Alma’s cataloging, authority control, and circulation functionality, but they noted less satisfaction with reporting, batch processing, and acquisitions functionality. Reporting functionality is problematic in FOLIO as well. Libraries need a coder with SQL knowledge to get data out of FOLIO, although EBSCO is starting to offer improved front-end reporting to assist FOLIO users. One participant related that their systems librarian and software developer had been able to write scripts for the Voyager system and appreciated that their ILS was hosted locally. After the migration, however, the systems librarian retired, and the developer did not want to learn how to work with Alma. This left the heavy lifting on the shoulders of the catalogers. Of course, not all libraries have systems admins or software developers, nor can they locally host their own ILS; instead, they need to rely on private companies such as Ex Libris and Amazon for cloud storage, which has led to some privacy concerns. Several participants noted that Alma workflows are inflexible and that one must complete every single step of the predesigned workflows in order to move on to the next task. Finally, participants agreed that vendors and platforms should provide better support for Arabic.

The discussion then turned to training in the new platform. Most libraries trained their staff prior to the migration, but a few waited until after the migration to train during implementation. Participants mentioned that the documentation provided by the vendor was often too complex and dense to be truly useful to staff. One of the participants mentioned that watching YouTube videos about Alma were easier to follow than reading the documentation provided by Alma.

There was some good discussion about the actual migration process. One of the participants predicted that a migration is imminent at her library, but she has never experienced one. She wanted to have a clearer idea of what occurs during a system migration in terms of the timeline. Participants mentioned that the actual data migration usually takes place within the space of a weekend, although some parts of the migration may happen at different times, and that vendors work with libraries to set deadlines for various migration-related tasks. The larger issue is the metadata cleanup before and, especially, after the migration occurs. The consensus was that, in fact, a migration is never quite finished. One participant maintained that it is better to clean up the metadata after the migration to Alma because this provides staff with an opportunity to learn how to use the new system**.**

Finally, the facilitators asked about lessons learned. Several participants emphasized the need for buy-in from all staff at all levels and, especially, for management and systems administrators to recognize how much work and time the migration process will take. LSPs should be easy to use with efficient workflows, but libraries should not expect to maintain pre-migration workflows just because “that’s how we’ve always done it.” Finally, a new LSP provides libraries with an excellent opportunity to evaluate workflows and staff/unit roles and revise where appropriate.

This session was hosted by the IG Co-Chair Sai Deng and the incoming Co-Chair Caroline Saccucci. Yan (Clara) Liao also helped in planning the session. We would like to thank Hsianghui Liu-Spencer for reviewing the part on DEI cataloging and workflow.

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(Compiled by Sai Deng and Caroline Saccucci)