

Core Subject Analysis Committee II
2022 Midwinter Meeting
Friday, January 21, 2022:
3:00-5:00 pm EST
Video Conference

Members present: Rockelle Strader (chair), Candy Riley (vice-chair), Violet Fox, Iman Dagher, Rose Krause, Deborah Tomaras, Pete Wilson, Karl Pettitt, Thomas Whittaker, Amanda Ros, (member and liaison to CC:DA), Adam Schiff (member and liaison to MARC Advisory Committee), Margaret Joyce (associate member), Adrian Williams (associate member), Karla Jurgemeyer

Members not present: Calli Neumann Deborah Rose-Lefmann

Liaisons: Sherman Clarke (ARLIS/NA), Jennifer Bradshaw (RBMS Controlled Vocabularies Editorial Group), Paul Frank (Library of Congress Policy, Training, and Cooperative Programs Division), Scott Dutkiewicz (Online Audiovisual Catalogers, Inc.), Veronica Ranieri (PCC SACO Program), Heidi Berthoud (FAST Policy and Outreach Committee), Camilla Williams (Library of Congress Dewey Program), Robert Bremer (OCLC), Barbara Bushman (National Library of Medicine), Stacey Devine (Library of Congress Children's and Young Adults' Cataloging Program), Rebecca Belford (Music Library Association), Judy Jeng (International Federation of Library Associations and Institutions), Annie Wolfe (Library and Archives Canada), Cate Kellet (American Association of Law Libraries),

Ex-Officio Member Present: Casey Mullin

Total attendees: 70

2.1 Welcome and introduction of members and guests

2.2 Approval of [Minutes](#) from annual, one note from Amanda Ros that Core is not an acronym, should not have all letters capitalized received on ALA connect. Has been adopted. Minutes adopted.

2.3 Old Business (introduced over email in November/December)

a. GNCR/SAC collaboration (Deborah Tomaras)

Update [here](#).

We are planning on approaching the PCC Committee on Standards. So we'd like to vote before then.

Vote/comment due by Thursday the 27th Thursday.

b. Follow up on “illegal aliens” (Violet Fox)

Violet Fox provided a history of illegal aliens

June 2019: SAC Working Group on Alternatives to LCSH “Illegal aliens” formed

* fall 2019: survey of libraries

* spring 2020: formal report spring 2020 <https://alair.ala.org/handle/11213/14582>

* February 2021: committee charge changed to clearinghouse

* June 2021: set of resolutions drafted to urge action from LC, which SAC voted not to endorse

* November 2021: LC announced revisions to LCSH

* November and December 2021: series of listening sessions undertaken by Jill Baron (director of Change the subject documentary), Tina Gross (former SAC member), and Violet Fox (SAC member)

Working group hasn't made much progress: We have been offered a link on the SAC webpage to Google drive folder for working group documents/clearinghouse. That google drive folder would be controlled by ALA and need to go through ALA staff to make changes/edits/additions

We are hesitant about clearing house idea right now based on technical limitations for the ALA Google Drive model. We want to be able to collaborate, have people add things such as code. Not sure if this is the right way to establish this.

Tina Gross (working group member);

Wanted to provide information on the listening sessions: there were 12 sessions of about a dozen people each. I was there for all of them, and I got a sense that there is an overwhelming desire and demand to have this kind of clearing house, not only for illegal aliens, but how to make local changes, a place for people to share what they have done, see what others have done.

Maybe the perception is that the purview of the working group is done, but there is a need for this kind of clearinghouse website. (My opinion) It occurs to me that one of the things the working group could do next is to see what we want from the clearinghouse/website that we can bring to ALA, to see if they can meet that. (Like github, as Kalan mentioned in the chat). Can we lay out what we need and if that is possible?

Amanda Ros: agree with Tina and what Violet said in the chat about this being administered by ALA, ALA staff are stretched too thin, there would be a lot of interest in the beginning and they might not be able to keep up with what needs to be added and changed. In ALA Connect, certain people, such as chairs, have authority to change things, it sounds like Google Drive is more locked down. I question having ALA administer it because of workload, demand, and bureaucratic structure.

Sherman Clarke in chat: There are a lot of specialist library associations that are working on the issue. Both as associations and as member libraries. ALA hosting presents problems for those of us in other organizations.

Rocki Stader: Should we be looking into a different Connect space, a public space?

Candy Riley: ALA connect is still an ALA administered space, might have more people able to change, but will still be an ALA thing. Might be a consideration, making the distinction. Understanding that the work of the task force is completed with the final report. The task forces was left open because of the clearinghouse issue. Should we think about the status of the working group?

Violet Fox in chat: What was the experience of setting up in ALA connect?

Candy Riley: Not ideal, but it's there, too early to tell. Will be looking for feedback later about what to change, but knowing these changes might be possible.

Violet Fox: Maybe the working group is done. The work can continue on volunteer basis without ALA aspect, as that involves a lot of hoops. If I, and whoever else is going to be doing the work on a volunteer basis, it might be simpler without the ALA aspect.

Rocki Stader: Do we want to revise the charge, say the task force is done? Clearinghouse idea is then free for anyone who wants to contribute. Doesn't have to be a formal ALA/SAC thing. The final report is in the repository and has been used by Ohio link in their work. Do you want to make the motion to close the charge for the original working group?

Violet Fox moved to close the charge of the task force. Amanda seconds. Continue with discussion.

Karla Jurgemeyer (working group member): was the charge revised to include the clearinghouse?

Karla Jurgemeyer: I feel the clearinghouse is the most important work we could do. That means the work is not done yet, the ALA/SAC connection might be helpful in that we can see who is doing this work.

Rocki Stader: Who are/were the working group members?

Violet Fox: Karla Jurgemeyer, Tina Gross, (not on SAC now, but on working group), Karl Pettitt, Cate Kellett.

Violet Fox, re charge: I don't think the charge was formally written up. It seemed (to me) it was up to me & the group to decide what the group's mission was.

Candy Riley: has SAC fingerprints all over it, can we say it's not SAC now?

Karl Pettitt: shared the midwinter meeting 2021 minutes that indicate there was no formal revision of the charge.

Amanda Ros: shouldn't be hard to publicize, even without SAC. Dissolve the working group, let it take its own shape.

Barbara Bushman: I'm concerned that if it's not a SAC project, then how to show expertise, sustainability.

Lloyd Chittenden: Don't we want the LOC to do this? Would LOC take it more seriously from ALA/SAC?

Candy Riley: I don't think that's the issue. From LC perspective, have they changed the terms and moved on or is there room for further movement? If it goes in it's own direction, would SAC want updates?

Violet Fox: I don't think this is the goal any longer. To be clear: I don't think the point of the working group or the clearinghouse is to change LC's mind. It's to help libraries seeking alternatives.

Lloyd Chittenden: @Violet, that is an important point. If LoC is not the target it changes a lot.

Karla Jurgemeyer,: The goal of the working group is not to change LC's mind. but to provide alternatives.

Judith Cannon: We are very aware there are obsolete and offensive headings. We intend to make changes but things move very slowly. There are certain things where we will arrive at headings given lots of considerations, it might not work best for everything, but we will try. I am trying very hard to make the process more open and that people can be heard .You are being heard, but that doesn't mean that you will get what you want.

Violet Fox: Title of the working group: SAC Working Group on Alternatives to LCSH "Illegal aliens"

Judith Cannon: We are looking for offensive headings to change (and possibly hiring for this), thinking of BFM. It should never determine whether a heading needs to be changed, but is an issue.

Karl Pettitt: The point of the working group is to show how people can make changes. Offering alternative ways to create subject headings to fit their local user needs. We did that. The question of whether we should be the holders of a repository/clearinghouse for that, it seems that there are issues with that as SAC/ALA. Even if we don't do that, it doesn't mean the task

force didn't do what we set out to do? If we are going to do something else, we need to come up with a new charge to do it.

Karla Jurgemeyer: I have some reservations on not having relation with ALA, but I do think it's worth trying a new method. I would be in favor of dissolving the working group to give a volunteer group more freedom.

Iman Dagher (in chat) agrees with Karla Jurgemeyer.

Rocki Stader puts the question to the committee: Vote yes to dissolve the group as far as the original charge was concerned. That does not mean we are ignoring the clearinghouse issue, just to bring closure on the original parameters, and say the charge has been fulfilled.

Vote passed. Thanks to group members and Violet Fox.

Violet Fox: Thanks to the other members of the working group.

c. Committee work with the Library of Congress (Candy Riley)

There are three things that SAC is working with LoC on. We talked about multiples and literary authors project in previous meeting. Is there feedback from LC on the tentative list commenting? Comments for us?

Veronica Ranieri Re: Thanks for asking. I am responsible for compiling all the comments that we received for the January list. When I was responsible for compiling, I loved having the comments, and made a spreadsheet both from LOC members and SAC. Please keep comments coming. The more eyes looking at these proposals the better. Comments can be big or small, if you notice punctuation that is missing, that's helpful.

Brian Stearns in chat: @Veronica Ranieri , sometimes I make comments about inconsistencies, etc., in other subject headings. Are those useful, do they get acted on?

Veronica Ranieri : Yes, Brian! We may not be able to act on everything, but we do try to keep track of work that needs to be done, and we try to fix what issues we can. Please keep sending us whatever you find.

d. Virtual participation (Candy Riley) from group composed of Candy Riley/Margaret Joyce/Rose Krause)

At the annual meeting there was lots of discussion on how we should do virtual meetings. Discussion went long as we talked about a bunch of ideas/options, so we didn't form a formal working group. Brian Stearns (previous chair) had given us a big area to look at, so we haven't done everything, but we've done some specific things, meeting frequency, including meeting

environment and investigating some things for that. We also talked about creating the public space in ALA connect to have access to committee documents.

Rose Krause: Regarding the frequency document, our discussion went off the idea that we want to have as much attendance as possible, we have had good attendance with virtual meetings. Our suggestion is that we do hybrid if not totally virtual, so that not just members and liaisons could participate. Candy and Rocki talked to ALA/Core staff about possible hybrid support.

Candy Riley: Yes, I asked about this in the Core chairs' meeting. If we want a hybrid environment we need a lot more support from Core. When we tried without support before it was very challenging. When I asked about support, they didn't know what support would be available, other groups agreed hybrid was quite challenging without support. Core doesn't have the budget for equipment and staff to support a hybrid environment. It's good to know that, even if it's not what we want to hear. They did suggest, if we have in-person meetings with virtual attendance, then it might be best to have even the people who are there use their laptops.

Rose Krause: Core staff also gave us preferred times for hosting meetings: February, July, October, Based on that we came up with options based on two or possibly three times a year. This is outlined in the document. We want to avoid adding meetings on-the-fly when we go overboard, so we would have scheduled three meetings, with one being overflow if needed. We discussed the possibility of having a speaker or presentation on day three. This could also be hosted as separate events. We gave an option to meet three times a year, which would spread out liaison reports and discussion. This is new, we haven't tried it before, and don't know if it would work. These are not recommendations but ideas on how to deal with these meetings.

Candy Riley: Again, this is just a small part of the original things, including talking with other groups in Core about if we want to coordinate meetings; we haven't done that yet, but we are still interested in that.

Rocki Stader: I would appreciate a February/June schedule instead of January/June one. It would get us closer to some of the other groups meetings, we are ahead of some meetings, which has made reporting difficult for the liaisons. I personally am not a fan of three times a year, as there is too much to cover in the meeting. It would feel too fragmented, we would have to split things up to mind the time for one meeting. I would remind everyone regarding all the meeting options, we should remember we have the option for asynchronous communication over email. We modeled this with the last vote and it went pretty well. I'm still a proponent of the two things a year thing, leave it up to you all on how long it should be.

Amanda Ros: I like the two times a year thing. My question to Rocki, how easy was it to come up with proposed dates? Would it be more convenient to give guidelines on the week that the meeting would take place in. This will help those interested in joining the committee what the expectations would be.

Rocki Stader: I agree. The benefit of midwinter/annual was knowing when the meeting would be. It is easier than the polling we did this time. We didn't have that framework in place. I would very much like to have it nailed down. This would make it easier for ALA as well, they would be expecting us to schedule at a certain time.

Rebecca Belford (in chat): +1 Amanda. From a liaison perspective it is *much* easier to know when reports are due!

Iman Dagher: I support option A. It seems more convenient, having the 3rd day option when needed and for potential programs is a plus.

Deborah Tomaras (in chat): Agree with Iman Dagher. 3 hours is a long time to carve out in a day to meet.

Barbara Bushman: In support three times a year might be more convenient for liaisons, not reporting at every meeting, when they don't have anything, but can select the one that works best for them. It would also mean that they could only attend once, when it's important to them. Less burden if the meetings are spaced out from other meetings, that can be clustered.

Rebecca Belford(in chat): With the newly established SAC public space (hooray!), members and all interested attendees will be able to access reports well in advance. If that allows liaisons to cut back on summarizing, maybe meetings could fit into 2 days @ 2 hours each, twice a year?

Amanda Ros (in chat): @Rebecca, "well in advance" assumes the reports are posted "well in advance" ;-)

Barbara Bushman(in chat): +1 to Rebecca - the meetings could be shortened if liaisons weren't repeating what is in the report, but rather answering any questions. Liaisons could have a deadline of X days in advance to post a report.

Rocki Stader: we have one more major discussion, can we move this discussion on email, for liaisons and members.

Agreed. Move to online presence from Candy Riley.

Candy Riley: should be a short discussion. We got a public meeting space on ALA connect. We wanted to get it live before the meeting to see how it worked before the meeting. The discussion boards should also be good. A few things: nobody is automatically a member of the public space. The documents are on the library tab on the top of the page or the bottom tab "view all resources" In the future I would propose all the documents such as liaison reports and agenda should be posted to both sites.

Rocki Stader: We need a naming convention for documents.

Candy Riley: Yes, we need that, we need them to be final for the agenda. Right now they have numbers and names. We also need to see what we can change on the public space/connect space. Please make comments so we have something to bring back to Core. Last thing: we need to be clear on what documents can and will be posted to the public site: right now, agenda, liaisons reports, final reports are available on the public space. There have been concerns about working reports and other things that are not final. Our big question is with the minutes and what form they should take, we asked Core for guidance, they had none. We had some concerns about posting meeting minutes to the public space.

Violet Fox: I would encourage liaisons *not* to read/reiterate their reports during the meeting.

Barbara Bushman: But the numbers on the agenda seem to change between meetings, so how do we know how to name/number our report?

Iman Dagher: what about recordings?

Candy Riley: Recordings are just for the minutes, we don't want to make them public, at least haven't decided it yet.

Tina Gross: I would love to see the minutes be public.

Barbara Bushman: Is there, at any point, any business items that are not public? Are there any closed items (committee business) that won't be opened to the public?

Rocki Stader: Generally, no. As far as I know now, we have never needed an executive session. We do sometimes get into discussions where some people don't want their name attached to comments. I am in favor of the minutes being public in general.

Iman Dagher: if that case a special request can be made to delete these those comments

Pete Wilson: I would be surprised if they weren't public

Violet Fox: I will argue for minutes to be public, only after being vetted by members, so comments are not misrepresented accidentally.

Pete Wilson: I think what Violet says sounds fine

Tina Gross: Approved minutes, not draft. Of course!

Amanda Ros and Deborah agree with Violet Fox

Rocki Strader: We can continue in email, we seem to be leaning in one direction, but don't want to jump ahead

e. SSFV best practices (Casey Mullin)

Casey Mullin now presents. The summary document is screenshared for discussion

Going quickly through the structure of the document, and what it is. We called this a summary document of best practices instead of a toolkit, as a toolkit indicates it is a complete thing. This is an evolving and ongoing set of best practices. This document should be accessible to people in many roles. This documents by itself might be considered a white paper, then talks about goals, decisions that need to be made,

Outline of document:

Automation vs human review spectrum, a few words about cooperation, many of us working in environments like OCLC worldcat. We are trying to get people excited about this kind of work and getting their data enhanced,

Additional consideration and future directions, talks about the issues that deserve more study.

Then it gets into modules,

The modules are a hub of information, can be contributed from many sources depending on expertise.

There are modules we know we need: for example, literature headings

Appendices: list of links to documentation to support current cataloging (prospective, not retrospective), living bibliography of literature in this space.

Rebecca Belford: thanks so much for this Casey, I love the idea of this document. I have a question about the wording in the title: my work on this is not batch focused the way that it is talked about in the title, and I can imagine using these for batch loading new records. Is retrospective doing a disservice here, this is more than just batch editing of legacy records?

Casey Mullin: We are talking about anything that is not creating a new record by hand.

Rebecca Belford: I was thinking about the meaning of legacy here and what it might mean (something uploaded from a card, is what I think, not loading a bunch of new records).

Casey Mullin: We are looking for support from SAC to move forward with a publication plan for this. We are thinking of this much more as a dynamic integrating resource than a versioning resource. Will this work with the ALA model? We are talking here about the summary document with two modules. It might make sense for the summary document to be a more static controlled thing, while the modules are different, and updated more continuously. Even things that are dynamic, what about the archival issue, keeping track of those updates?

Rocki Stader: This is very similar in technical problems to the clearinghouse question. Thoughts from others?

Casey Mullin: To reframe our big ask, given the question about the most sustainable way to instantiate this, is there anything in the document that would stop us from moving forward (besides technical issues)? There has been some commenting, which is good, we'd like to get more eyeballs on this. What's the immediate next step?

Rocki Strader: Good question

Casey Mullin: We've done several years of work and we are ready to go.

Candy Riley: I have been working on this, we have been passing it along, editing it etc for a while, we are in a good place. Is what we are saying is that we at least want SAC to look at this (with comments and feedback) and an eye to thinking about what is going to be put in place

Casey Mullin: Yes, we are ready for feedback to be an ongoing thing, but we hope the summary document is in a pretty good place, so that the next step is to figure out how to get the summary document published.

Candy Riley: You don't necessarily want any word from SAC right now, you want to show it to SAC and the public.

Casey Mullin: Yes, we are just asking if there are any big things that would stop us from going forward.

Candy Riley: Clarification on what we want from SAC, are we asking about showing it to others, or how to publish

Kalan Knudson Davis (in chat): when we released DCMR we went through an internal review cycle with BSC volunteers and then did a public review to get feedback from external reviewers.

Rocki Strader: Are you asking, then, for permission from SAC to publicize this more broadly?

Casey Mullin: Yes.

Rocki Strader: I would think we need a little more time for internal feedback.

Paul Frank (in chat): Casey, Wouldn't you want to forward it to the PCC Policy Committee for consideration?

Casey Mullin: re: Paul, we do have a PCC liaison, at this moment SAC is the official body to approve. Since this is an ALA product, I don't know that we need to work with PCC right now, before publication.

Rocki Strader: So the vote is, is SAC comfortable with releasing this for public comment? Is that the question, Casey?

Casey Mullin: yes

Rocki Strader: Should the subcommittee release this for broader public comment?

We have a majority yes.

Casey Mullin: We are not talking about putting it on the IR yet, but circulating it for public comment.

Rocki Strader: Yes, you can add a prod to the committee's list for comment and open a discussion to email.. and the other related lists.

Continue the discussion by email

Open discussion time:

Violet Fox: SAC members, are there any statements that we want to make as a group? PCC DEI advisory committee is asking LoC about reasoning behind illegal immigration, making it public. Judith Cannon floated the idea of an editorial board for LCSH comment/ca ommittee with outside voices. There are also matters of labor issues and deprofessionalization. Anyone can get in touch with Violet Fox and Rocki Strader about this.

Tina Gross: I would really like to see SAC (or some group within ALA) to say something about the recent announcement from OCLC about the temporary Dewey position. Doesn't ALA have official positions on the casualization & deprofessionalization of library work?