Here are my answers to questions that arose during the webinar, particularly the ones that didn’t get answered due to time constraints, but also some others that I wanted to make additional comments on. –Adam Schiff

*Question:* For name authority records 374 field, is it then preferred to use subfield $2 lcdgt rather than $2 lcsh for professions?

*Answer:* The Descriptive Cataloging Manual Z1 (<https://www.loc.gov/aba/publications/FreeDCM/DCM/Z01.pdf>), for field 374, says:

"Prefer controlled vocabulary, such as LCDGT, or MeSH, recording the source in subfield $2. For consistency, capitalize the first term in each subfield $a. When terms do not come from a controlled vocabulary, use a singular form."

You can use LCSH, LCDGT, MeSH, FAST, AAT, or any of the other numerous controlled vocabularies that are available and that have codes established for them.  See Subject Heading and Term Source Codes (<https://www.loc.gov/standards/sourcelist/subject.html>) and Occupation Term Source Codes (<https://www.loc.gov/standards/sourcelist/occupation.html>).

That said, most catalogers have been using LCSH, since it's more easily searchable in OCLC where most catalogers do their authority work. For LCDGT, you have to find the terms in ClassWeb Plus or search them in the LC Linked Data Service (<https://id.loc.gov/authorities/demographicTerms.html>). There's also a PDF list available on the LCDGT documentation web page (<https://www.loc.gov/aba/publications/FreeLCDGT/freelcdgt.html>) but it is only updated once a year.

*Question:* LC Auth records deliberately leave info out for safety reasons such as protecting gay or trans individuals. What is LCDGT doing regarding this issue?

*Answer:* LCDGT has terms for many identities, including LGBTQ+ identities. The issue isn't with the vocabulary itself, but how and when it is used in bibliographic and authority records. For a compilation of works by people in a particular group, I see little issue with including a 386 field for the creators in a bibliographic record. That is indeed the purpose of creating the compilation in the first place, to collect works by a particular class of persons. For an anthology of poetry by LGBTQ authors, since that's the purpose of the collection, there's no reason not to add a 386. The same is true should an authority record be created for that anthology.

With individual works by an individual creator, self-identification is key. If the creator self-identifies as a member of any demographic group, that should usually be enough to justify including a 386 for that group in a bib record for that work, in an authority record for the work should one be created, or in the authority record for the person.

*Question:* How do you explain this to public services colleagues so that they are excited about this (without getting way in the weeds)? I've noticed the terms are pretty hard to browse/search/find in the static PDF. If there was a way to teach public services about these a little more robustly, we could rely on them to teach users...

For instance, putting the info online shared earlier in the slides about the structure of LCDGT (the 9 categories) would help pub svcs I think. Just some form of entry other than the large pdf.

*Answer:* I think one of the keys is to set up a discovery system to actually make use of the data and then show what is possible to public services colleagues.  Or show them someone else's system (like Orbis-Cascade's Primo implementation of faceted fields) and see if they would have interest in having this kind of faceting available.  Most libraries by now are going to have records with 385 and 386 fields, even if their system is doing nothing with them.

Also, getting public services colleagues to suggest needed new terms might be a way to get them enthused. There are numerous terms in LCDGT that aren't in LCSH. And of course vice versa, there are numerous class of persons headings in LCSH that could be needed as audience or creator characteristics and that could be proposed for inclusion in LCDGT. The LC Linked Data Service is an easy way for anyone to search to see if a term is in any of LC's vocabularies.

*Question:* Regarding contributors who are long dead, is it considered OK to assume that someone where there has been no apparent doubt in their life that they have been e.g. female, they have gone by Miss/Mrs and lived a "traditional" life, that you can use "female printers"? The majority of our collections we would like to use LCDGT for are pre-1850 Special Collections, where the contributors themselves, or immediate relatives, cannot confirm!

*Answer:* I would say, generally, yes. Obviously notions of gender and gender identities have changed since the 19th century, so you have to rely on whatever information you have available in documents created by the person themself, or in reference sources.  I think if they called themself Miss/Mrs it's probably not a huge risk to call them "Women." Note that "Women" would include women whose biological sex is female as well as trans women.  Also please note that in LCDGT we do not use composite terms like "Female printers" or "Women printers." In LCDGT you'd assign "Women" and "Printers" in a 386 field for a work created by a woman printer.  In a personal name authority, we no longer record gender at all in 375, and delete it when revising a record for any other reason. So in a personal name authority for a female printer, you whould assign occupation 374 Printers $2 lcdgt and gender is left out.

*Question:* Where can I find the scope notes for LCDGT? I'm in ClassWeb Plus and can't see it.

*Answer:* Not every term has a scope note.  Americans is one of those without a scope note.  If there is a scope note present in the LCDGT authority record, it will display immediately below the bold (authorized) term in ClassWeb Plus.  For example:

**Athabaskanists**

  Established March 2023.

  Linguists who study Athabaskan languages.

    UF  Athabascanists

    BT  Linguists

**Boaters**

  People who operate boats for a living or for recreational

 purposes.

    NT  Canoeists

        Rowers

        Sailors

**Bonaerenses**

  Established November 2022.

  Residents of the province of Buenos Aires, Argentina. For

 residents of the city of Buenos Aires, Argentina, see Porteños

 (Argentina).

    UF  Buenos Aires, Argentina, residents (Province of Buenos

 Aires)

        Buenos Aires Province, Argentina, residents

    BT  Argentines

    NT  Porteños (Argentina)

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Scope notes, when present, also display immediately under the established term in the display in the LC Linked Data Service.  For example see the record for Boaters at <http://id.loc.gov/authorities/demographicTerms/dg2015060076>.

As Michelle Cronquist answered live in chat, you can view the entire authority record in ClassWeb Plus by clicking on the gray box next to the term and click "MARC display" to get the full record, which can give some helpful context.

*Question:* Can you speak more about the justification needed or literary warrant to propose new term, is one source is sufficient?

*Answer:* You only need one work being cataloged that needs a new term in order to be able to propose it.  For example, you don't have to wait until you have two, or three, or four works for or by gastroenterologists in order to make a proposal to add Gastroenterologists to LCDGT.  That being said, the work that you are cataloging is almost never sufficient for creating proposals.  You need to cite other reference sources that justify your choice of authorized term, as well as any variant forms that you want to include as UFs.  The LCDGT manual instruction sheet L 440 Authority Research and Citations for LCDGT Proposals (<https://www.loc.gov/aba/publications/FreeLCDGT/L440.pdf>) addresses these issues.

*Question:* Most LC bib records I see don't include 385 and 386 fields. Is there a policy about including them, or not? Will we see more in the future?

*Answer:* Most LC catalogers aren't using these fields yet. I don't believe that LC has done much training of its staff in applying LCDGT yet, and I don't believe that they have configured their discovery system to do anything with the fields. Hopefully webinars like this and future training will encourage them to start applying LCDGT more widely. Since a large proportion of the resources we acquire is processed quickly and with minimum to no review if it has LC copy available, audience and creator/contributor information that would benefit our users is being lost when it isn't in an LC-created record.

*Question:* Is there a rule as to the order you would put different $a subfields in the same field?

*Answer:* No, the order doesn't really matter. It doesn't affect searching or limiting. There is actually an instruction sheet about this: L 495 Order of Demographic Group Terms (<https://www.loc.gov/aba/publications/FreeLCDGT/L495.pdf>). The general rule stated there is "Assign demographic group terms in any order if the resource is unclassified, or if

the classification number does not reflect either the characteristics of the creator/contributor or the intended audience."  Consult the instruction sheet for further guidance. But generally, I'd say not to worry very much about the order.  This is certainly not something the cataloging police are going to come after you for. 🙂

*Question:* Author location in 386--I assume this is for the current location but what if the author moves? is there a link explaining why the 386 is different in another record?

*Answer:* Remember that 386 is used to describe the characteristics of the work or works that you are cataloging.  The data should apply to THAT particular work or group of works.  So works created while living in Seattle would get Seattleites, while works created when the person was living in Boston would get Bostonians.  Both sets of works could have Americans assigned.  Another good example is a creator's juvenilia, that is, works created when they were children or teenagers. You wouldn't put "Girls" as a creator characteristic in all of Jane Austen's bibliographical records, only in the ones for works that she wrote as a child or teen.  You would only assign "Boys" in the 386 in bib records for scores or recordings of Mozart's works written when he was a child, not in all bibliographic records for any Mozart work.

*Question:* Are there patron use cases or studies that support the creation and use of separate field for demographic terms?

*Answer:* I believe that there have only been a few published studies on the use of LCDGT in the library literature.  But the justification for demographic terms actually comes from the project to create and implement LC Genre/Form Terms and the limits to what can be included in LCGFT.  The ultimate goal is to stop recording genre/form terms in field 650 unless a work is ABOUT that genre/form.  Many existing LCSH terms for genre and form include information about the audience or creators.  For example: Children's stories means fiction for a child audience.  American poetry means poetry created by Americans.  In LCGFT, audience and creator characteristics are not explicitly allowed.  Therefore, if we stop assigning Children's stories in field 650 to works that are stories for children, and we assign 655 Short stories (or Novels, or some other LCGFT term), we need to have another place to record that the audience of the work is children.  Or that the creator of the poetry is American.  That's what the 385 and 386 fields were created for.  So that we don't completely lose this information, that many people are interested in searching for.

*Question:*  Will online training modules for LCDGT be developed and added to LC's Catalogers Learning Workshop page?

*Answer:*  The PCC hasn't developed any substantial training yet, but I have.  You can see many iterations of workshops that I developed for LC faceted vocabularies on my web page at <http://faculty.washington.edu/aschiff/>.

*Question:* Is adding demonyms for creator characteristics in bibliographic records sustainable? Creators may move frequently within a country (if you are identifying the city in which a creator lives) and that would quickly make the information outdated.

*Answer:* It is not outdated because it applies to the particular work/expression being described by that bib record, not to ALL of the person's works.  A demonym term means someone from a particular place or currently residing in that place.  In practice, we use LCDGT terms to indicate works by someone who was born and raised in a particular place, and also who currently lives in a particular place.  I've was born and raised on Long Island, and have lived in several places, the longest time being San Francisco and Seattle.  So it would ok to say that any work that I've created is by a Long Islander, but I would only apply Californians/San Franciscans or Washingtonians (Washington State)/Seattleites to works created when I was residing in those places.

*Question:* How can an ILS search these terms?  As a subject?

*Answer:* We have configured our ILS to include terms in 385 and 386 in our keyword indexes.  They are not indexed as subjects if they are in 385 or 386 because these are not subjects.  We did not create separate browsable audience or creator characteristics fields that you can search for on their own, although it would certainly be possible for someone to configure an ILS that way.  Instead we developed facets for various things, including audience, creator demographics, place of creation, date of creation, medium of performance for music, musical key, etc. and we configured our discovery system to populate the facets with data from the appropriate MARC bibliographic fields.  There's been some published literature on how the Orbis-Cascade Alliance set up its facets in Primo.  See, for example: <https://doi.org/10.1080/01639374.2023.2197897> and <https://doi.org/10.1080/01639374.2023.2222120>.  There are also open access sites like that of the Orbis-Cascade Alliance's Normalization Rules Standing Group: <https://www.orbiscascade.org/programs/scts/technical-services/nrsg/>.  For example the NRSG's [GitHub repository of current display/search/facet rules](https://github.com/Orbis-Cascade-Alliance/ve-norm-rules) for VE.

*Question:* Is there a controlled vocabulary for relator terms?

*Answer:* There are several controlled vocabularies for relationship designator/relator terms.

You have available the relationship designators that are in the original RDA appendices. The MARC relator terms can be viewed and searched at <https://id.loc.gov/vocabulary/relators.html>. RBMS relationship designators are also available through LC's Linked Data Service: <https://id.loc.gov/vocabulary/rbmsrel.html>.

*Question:* When cataloging collections of fiction or poetry by one author, I often come across bibliographic records with LCSH nonspecific form headings (such as "American poetry") in 650, which appear to be in contradiction to H 1790 and H 1800. Is it appropriate to remove the 650 and add 386(s) (and 655s) instead that may reflect the same or similar information?

*Answer:* I agree with Casey Mullin's reply: "I think it is. I would do just that.  Possibly also 370 and 046, too."

*Question:* Regarding the creator's characteristic in 386 in bib record, don't you see that this is redundant when the same information exists in the NAR of the creator? Also, the justification to add 386 would be missing in bib records unless we should add it in a note, right?

*Answer:* It is only redundant if you have a discovery system that allows searching based on attributes recorded in authority records.  I don't know of any that allow you to search for NARs that have a particular occupation recorded and then retrieve all of the bib records for any person that has that occupation.  Also please remember that 385 and 386 are for WORKS and EXPRESSIONS, whether in bib or authority records.  We do not create authority records for most works or expressions, so there's nowhere to record information about audience and creators of most works.  And also, as illustrated by my Jane Austen and Mozart examples above, it would be inappropriate to record "Girls" or "Boys" in their personal name authorities.  That would only go as characteristics of works by them created during their childhood.  For compilations by various people, there are no personal name authorities that would be able to be used to record the creators of the works in a compilation.  That can only go in the bib record for the compilation unless a work authority is created for it.  But then we're back to the issue that most, if not all, ILS's do not use attribute data recorded in authority records.

You do not need to justify terms recorded in 385 and/or 386 fields in bibliographic records. There is no need to have a note in a 5XX. We don't justify 650 and 655 fields either.

*Question:* Creators have many attributes other than gender and nationality. Why are almost all these examples only showing those attributes

*Answer:* Gender and nationality (or where someone lives) are often revealed by authors in blurbs or "about the author" statements in publications, but many of the examples I included in my presentation showed other attributes, such as religion, ethnic group, language, and age groups.  You can record only what you know and which is self-disclosed by the person/people in question.

*Question:* Does LCDGT have a concept of "pattern", like adding :"Student of" to a language name, or must each use be established?

*Answer:* Yes, there are patterns that get cited in LCDGT proposals.  There is a specific box in the proposal form to cite a pattern.  There are also numerous instruction sheets in the LCDGT manual that tell us how to formulate terms in particular categories.

*Question:* What is the benefit for using LCDGT in 368 for specific states and/or cities if/when a creator often moves residences?  Or would these terms be more apt to be used for the place of the creator's birth?

*Answer:* I think I've addressed this previously. In bib records you would assign 386 fields for characteristics that are true for the particular work that is being described by that bib record.  Works created when a person was living in different places would get different terms in the 386 field.  In name authorities, you could use repeated 368 $c's to reflect various places a person lived.  If you know the time periods you can even provide that in name authorities:

368 $c Americans $2 lcdgt

368 $c Seattleites $c Washingtonians (Washington State) $2 lcdgt $s 1997

368 $c San Franciscans $c Californians $2 lcdgt $s 1990 $t 1997

Without dates in $s/$t, multiple $c's means that a given term applies currently to a person or applied at some time.  Having them all potentially allows someone to look for works associated with persons from a place that the do live in or once lived in.

*Question:* Adam, do you justify (in 670) the use of lcdgt terms in NARs? I mean, do you illustrate in 670 that the term you assign is used in some resource, i.e. self-identification of the person?

*Answer:* Yes, generally speaking terms recorded in most 3XX fields in NARs need to be justified in a 670 field or by using the alternative method of $v (and optionally $u in addition to $v) in the 3XX field itself.  Here's an example of an NAR that I revised today:

100 1 Fernando, Sonali

368   ǂc Sri Lankans ǂ2 lcdgt

368   ǂc Colomboites ǂ2 lcdgt

370   Colombo (Sri Lanka) ǂ2 naf

370   ǂc Sri Lanka ǂ2 naf

370   ǂe Colombo (Sri Lanka) ǂ2 naf

...

670   The wallflower girl, 2003: ǂb title page (Sonali Fernando) introduction (poet) page 4 of cover (Sonali Annemarie Fernando was born in 1982 and raised in Colombo, Sri Lanka)

*Note:* You won't find Colomboites in LCDGT if you look for it today. I just submitted a proposal for it. (If it doesn't get approved, I'll go back and delete it from this NAR.)

However, the LCDGT manual specifically says that you can record 385 and 386 fields in bibliographic records without having to justify these terms anywhere else in the bib record.  You do not need to include 5XX notes for example to justify terms in 385/386. This is the same practice for 650 or 655 fields that you've included.

*Question:* A general question, why do you think the practices of the use of LCDGT is still limited, personally I don't see them that often?

*Answer:* Because there has been very little training offered (and received) by anyone, because LC itself has not fully implemented using all of its faceted vocabularies, and many people are still unaware of the vocabulary and its uses and of the manual that's been created for its application.

*Question:*  Are you seeing opportunities to automate the data entry, possibly by pulling data from different sources, using expandable check box lists, or based on private sector data entry practices?

*Answer:* The music cataloging community, working with Northwestern University's automation whiz Gary Strawn, has developed an application that works with OCLC bib records and is able to generate a number of facets from data present in 650 fields in score and sound recording records. See the Music Toolkit at <https://files.library.northwestern.edu/public/Music382/documentation/>.  The Core SAC Subcommittee on Faceted Vocabularies is also working on developing guidance for automated generation/retrospective application of 385 and 386 based on data in 650 fields.

*Question:* Shouldn't it suffice to add LCDGT terms to an authority record for a creator instead of repeating them in every work record by that author?

*Answer:* Well in an ideal world we'd have authority records for every person and for every work, and we'd have systems that used the attribute data recorded in them.  But we don't have that. And I've identified at least some cases where it's inappropriate to put an attribute in a person's NAR but appropriate to put it in an authority record for one of their works (Mozart or Austen work composed or written during childhood). And because people do change where they live, their occupations, their religious affiliations, develop medical conditions, etc., sometimes a term is not applicable to all of their works. It's incorrect to say that a work written by Beethoven before he started to lose his hearing was created by a hearing impaired person.  That's true of the late symphonies, but not the early ones.  Beethoven could still hear speech and music normally until 1812.

*Question:* Would it be good to use a 374 for fields named in dissertations?

*Answer:* While all 3XX fields in authorities are basically optional, I think it's helpful to include occupation(s) if that is readily ascertainable. I'd also encourage libraries to propose occupational terms that aren't yet in LCDGT.

*Question:* I assume adding a qualifier to "Americans" has been considered?  Something like Americans (U.S.A.)...

*Answer:* I can't speak to what LC did or didn't consider when it created the initial batch of LCDGT terms, which included demonyms for the U.S. and all of its states and territories.  However, the term Americans is most commonly understood to mean citizens and residents of the U.S. and I don't think a qualifier is needed right now.  I suppose if a demonym is needed for residents of the Americas it could be proposed, and research would need to be done to determine is the term Americans is also the most commonly used term for that concept.  If so then there'd be a conflict and it would need to be qualified and LC might need to also qualify the existing term by (United States).  Remember that to establish a term for residents of the Americas you would need to have a work for or by that demographic group.

*Question:* If a term is not in English, what is the policy to make proposal, translate into English and propose?

*Answer:* LCDGT manual instruction sheet L 445 Form of Authorized Term (<https://www.loc.gov/aba/publications/FreeLCDGT/L445.pdf>) gives instructions on when foreign terms are used in LCDGT. The general instruction is "Establish demographic group terms in a language other than English only if either of the following two conditions."  You can read the conditions and further instructions at the link I provided.

*Question:* Since LCDGT is so subjective, why was it decided that it is worth creating in the first place?

*Answer:* I don't agree with the premise that LCDGT is subjective.  Terms in LCDGT are assigned to works and expressions (and to personal name authorities) based on self-identification, or in some cases, based on research and authoritative reference sources about the creator or audience of a work.  We don't assign LCDGT based on hunches or cataloger whim. If the sources of information state that an author is a gay male Jewish librarian, then it's not subjective to say that the work being cataloged was by Gay men, Men, Jews, and Librarians.  I cataloged something yesterday where I was pretty sure that the author was a trans woman, but I didn't find anything where they explicitly identified themselves as such.  They did use the pronoun "she," so I was comfortable saying that their work (a novel) was created by a woman, but I did not also include Transgender people in a 386 field in the bib record for that work.

But back to the question of why LCDGT was created in the first place. As I mentioned in a previous answer, when LCGFT was created, terms that included audience or creator characteristics were not eligible for inclusion, with a few exceptions (e.g., there are some LCGFT terms beginning with "Children's", and terms in which the audience or creator is not explicitly stated are permitted, e.g. Fu is a classical Chinese poetic form so its creators are usually Chinese people).  Once we limit the use of LCSH form/genre terms in field 650 to works that are ABOUT that form/genre, then the genre/form will only be recorded in field 655 using LCGFT and any other aspects describing what the work IS need to go into other MARC fields (e.g., 046 and 388 for chronological aspects (Medieval poetry), 370 for place of origin, 382 for medium of performance, 385 for audience, and 386 for creators).  So, for a collection of American poetry by women, we currently assign 650 #0 American poetry $x Women authors.  But such a collection is not about poetry by American women.  If we stop using that 650 for this, we end up with:

370    $c (and/or $g) United States $2 naf

386    Americans $a Women $2 lcdgt

655 #7 Poetry. $2 lcgft

LCDGT was created in order to have a controlled vocabulary specifically for demographic terms for audience and creators/contributors to use in the 385 and 386 fields.  It has the potential to allow all kinds of searches that are difficult or impossible to currently do in our discovery systems.  In the current systems we use, how easy is it for you to provide an answer to questions like these: "Do you have any novels by German lawyers?" or "I want symphonies created by Canadian women from Alberta".  We could answer questions like this if we have the faceted data in our records (ideally, in authority records, but practically, given today's systems in bib records).