Hacking the Catalog as an Open Access Research Tool

Jeehyun Davis, Associate University Librarian for Collections and Stewardship, Villanova University, jeehyun.davis@villanova.edu

Kristen Hogan, Director of Collections Strategy and Library Operations, Barnard College, khogan@barnard.edu

NUTRITION INFORMATION

Part of the life cycle of scholarly communications is discovery, and one type of material often obscured by the federated results of library search interfaces is open access materials not hosted in the institutional repository but living on the open web. Selecting and cataloging such open access resources builds a focused collection of open access materials that appear in the same search results as materials that libraries lease, purchase, and host. Bringing open access materials into catalog results makes them easier to discover, use, and cite. Identifying and cataloging open access resources emphasizes the vital roles of collection development and cataloging in curating collections of open access resources for research. As with proprietary collection building, a commitment to create catalog records for the open access scholarship created by your faculty, students, and staff improves the discoverability of these resources and can bring your institutional affiliates into new scholarly citation networks. This process also offers an opportunity for modeling critical cataloging. Using local headings and affirming keywords and vocabulary to build a full catalog record improves the catalog's affirmation of people of historically marginalized identities and asserts the critical value of ethical naming as a scholarly communications practice to support distribution and future authorship.

We share here the steps for creating or a conversation for affirming and continuing this practice at your institution.

LEARNING OUTCOMES/PROJECT OUTCOMES

Chefs who take on this recipe will be able to do the following:

1. Bring into the scholarly communication cycle open access resources authored or used by affiliates of our colleges by connecting researchers with these resources in their usual search interface.
2. Curate a non-custodial collection of open access resources to profile for users to put these resources in dialogue with materials libraries lease, purchase, and host.
3. Enact critical cataloging practices by intentionally describing open access materials with attention to interrupting oppressive metadata structures, especially when cataloging takes place in conversation with material creators.
4. Energize liaison librarian outreach to faculty and students about the role of the library catalog and collections in scholarly communications and supporting their networks and research.

NUMBER SERVED

Here are the numbers served based on 2 years of mixing for an institution with 40 library staff members and 249 full-time faculty:

- 8 faculty members, 2 activists in residence, 3 liaison librarians, 1 metadata and collections strategy librarian, 1 cataloger; these are the numbers directly served by having their work profiled, supporting their teaching, and building their networks.
- 40 open access resource records created in the local catalog (and uploaded to OCLC) that come up in federated library search results and are used in course reserves and library instruction
- A note on growing your numbers: When library instruction sessions build awareness of these search results, open access cataloging serves researchers across the institution. The liaison librarians involved taught around 120 instruction sessions over the 2-year period.

COOKING TIME

Cooking time for this recipe is adjustable to your schedule. There is a stewing period to build the interconnections among technical services, research services, and collections, gather a starting set of materials, support the process of cataloging with an equity mindset and in partnership with creators where possible, and share out the collection in instruction sessions and other venues.

DIETARY GUIDELINES

Three standards and frameworks describe the nutritional contributions of this recipe, positioning the catalog as a site within the scholarly communications cycle, shaping scholarship as conversation, and with an ethical commitment to using description to follow the direction of and affirm people of color, LGBTQ people, people who are immigrants, and people of more than one of these and other historically marginalized identities.

- ACRL *Framework for Information Literacy for Higher Education*: This framework is aligned with the core concept of this recipe, which connects librarians (including collections strategy librarians, liaison librarians, and catalogers) with researchers to make possible discovery and access of open access resources via library catalogs. It may be particularly fruitful to view this recipe through the frame Scholarship as Conversation. The process of selecting open access materials for and describing them in the catalog makes possible new connections across scholarly conversations. By means of information literacy activities, liaison librarians actively engage with researchers to add open access resources in library catalogs, which are considered as a key tool in the scholarly communication cycle.
- ACRL Scholarly Communication Toolkit: This recipe is directly related to the Discovery & Dissemination phase of the lifecycle of scholarly communication defined by ACRL (see figure 1). The

Figure 1. Lifecycle of scholarly communication (ACRL)

recipe emphasizes that the catalog is not a passive description of materials but a site of active and critical collection and description of materials in ways that shape discovery and dissemination.
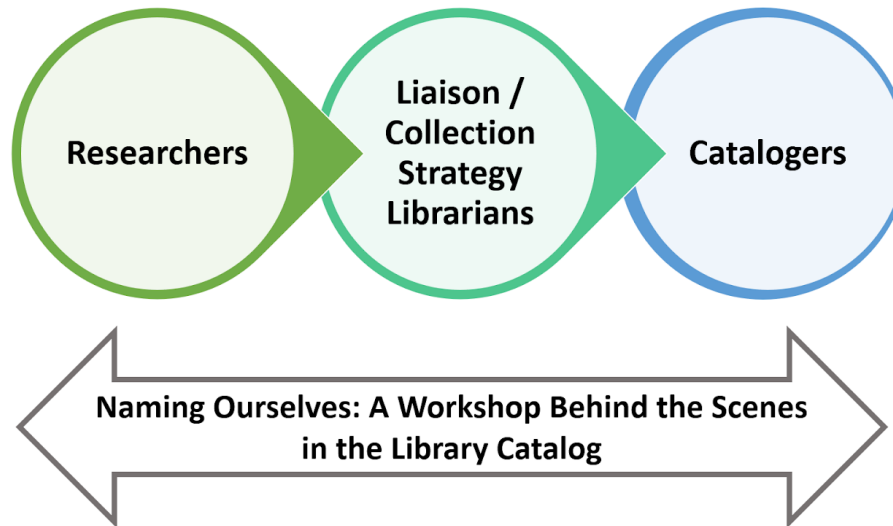
- The ALCTS (Association for Library Collections and Technical Services) Diversity Statement adds to both of these standards by committing to "Resisting bias in resource description while recognizing that the act of description is never neutral." When we put the catalog in the cycle of scholarly communication and in conversation with the ACRL *Framework*, description is clearly a critical and analytical act. Creating catalog records by using terms from diverse controlled vocabularies, dictionaries, and encyclopedias helps describe historically marginalized identities in an equitable way.

INGREDIENTS & EQUIPMENT

Players: This recipe is effective when catalogers and metadata practitioners, liaison and collections strategy librarians, and faculty and researchers are working collaboratively.

- Catalogers and metadata practitioners create locally customized catalog records for open access resources by using diverse and equitable terms from various vocabulary sources. This group works closely with liaison librarians to create rich catalog records to facilitate the discovery of and access to open access resources.
- Liaison and collections strategy librarians serve as a connector between catalogers and researchers. They work collaboratively with researchers to identify open access resources that are not easily discoverable via normal search mechanisms such as web browsing and database searches. Then, liaison librarians request catalogers to describe such resources and create catalog records.
- Faculty and researchers clearly understand this recipe and request liaison librarians to create catalog records for open access resources that they want to share and retrieve via the library catalog.

Communication: Establishing communication among players regarding the process of creating catalog records in library catalog is the key to the successful implementation of this recipe. Through information literacy sessions or a special event, this recipe should be widely promoted among library staff, faculty, researchers, and students (see figure 2).

Figure 2. Process and communication among players

central to the institution's researchers and collections.

3. Develop metadata guidelines for describing these resources. As part of this process, create a social justice framework for metadata creation for discovery of open access resources (see Chef's Notes).

4. Create the catalog records for open access resources.

5. Conduct outreach about these resources through library instruction sessions, library news, and events (see Serving Suggestions) to share the word.

6. Repeat a cycle of steps 2–5 for new collections.

ALLERGY WARNING
Similar to any other library operations, this recipe requires highly detailed documentation on decisions and processes regarding creating customized catalog records for open access resources. Documentation could include the following:

- Name of the local collection—for example, Open Access Resources
- Location of open access resources
- Cataloging practices, including sources of vocabularies, dictionaries, etc. being used for the collection
- List of required and optional description elements for catalog records—for example, title, author, publisher, summary, table of contents, subject terms, genre terms, keywords, URL, collection name, etc.
- List of players including names of faculty, researchers, liaison and collection

PREPARATION

- Intention of and commitment to this recipe must be understood between catalogers and liaison and collections strategy librarians prior to implementing this recipe.
- Players adequately discuss the process of creating catalog records for open access resources in library catalog.
- Liaison and collections strategy librarians and catalogers design a workflow to create catalog records for open access resources.
- Liaison librarians promote the discovery and access of open access resources in the library catalog to faculty, researchers, students, and other library staff.

COOKING METHOD
The library creates a workflow to process open access resources cataloging as part of the lifecycle of scholarly communication (see figure 2). The three players have distinctive roles in this recipe to enable the discovery and access of open access resources in the library catalog.

1. Gather a library team composed of liaison and collections strategy librarians and catalogers. Together, the library team establishes process, including a social justice framework for this collection development.

2. Conduct outreach to and collaborate with faculty to introduce the practice of curated discoverability of open access resources and to identify open access resources

strategy librarians, and catalogers and metadata specialists

Documenting the decisions and cataloging procedures is extremely important, especially when managing multiple local collections of open access resources.

CHEF'S NOTES
For reviewing and selecting affirming terms for historically marginalized identities, connect with controlled vocabularies, encyclopedias, or glossaries created by communities being described. Controlled vocabularies created by communities being described—for example, the Homosaurus or the Maori Subject Headings Thesaurus—can be used in local subject heading fields; this is a key way to follow the leadership of people of historically marginalized identities and to bring vital positive naming into catalogs. Controlled vocabularies, encyclopedias, or glossaries can both be used when catalogers or metadata librarians are working with a set of terms to decide which is best for the record. The controlled vocabularies or encyclopedias can offer more information about the meaning and impact of different terms. See table 1 for an example set of resources from Barnard College Library.

Serving Suggestions
Serve this up as an event or a class workshop:

Naming Ourselves: A Workshop Behind the Scenes in the Library Catalog

African and African Diaspora Studies
- *Oxford African American studies center*. Oxford University Press. Retrieved April 23, 2020.
- Asante, M. K., and Mazama, A., Eds. (2005). *Encyclopedia of Black studies*. Sage Publications.

Asian American Studies
- Danico, M. Y., Ed. (2014). *Asian American society: An encyclopedia*. Sage Publications, 2014.

Native American and Indigenous Studies
- University of British Columbia Library. (2020, April 16). *Indigenous librarianship > indigenous knowledge organization > controlled vocabularies*. Retrieved April 23, 2020, from https://guides.library.ubc.ca/Indiglibrarianship

   Including:
   - Changes to Library of Congress subject headings related to indigenous peoples
   - Māori Subject Headings Thesaurus
   - Pathways: Gateway to the AIATSIS Thesaurus
   - Te Rōpū Whakahau Online Publications

- American Indian Library Association. (2012, January). *AILA subject access and classification, thesauri*. Retrieved April 23, 2020, from http://ailasacc.pbworks.com/w/page/1597613/Thesauri

   Including:
   - National Indian Law Library Thesaurus
   - Aboriginal Thesaurus
   - First Nation Names Authority List
   - First Nations House of Learning Thesaurus

- University of British Columbia Library. (n.d.) *X wi7x wa classification system*. Retrieved April 23, 2020, from https://xwi7xwa.library.ubc.ca/collections/indigenous-knowledge-organization/

Lesbian, Gay, Bisexual, Trans, Queer Studies
- Homosaurus Editorial Board. (n.d.) *Homosaurus: An international LGBTQ linked data vocabulary*. Retrieved April 23, 2020, from http://homosaurus.org/; LCSH Source Code: homoit
- Human Rights Campaign. (n.d.) *Glossary of terms*. Retrieved April 23, 2020, from https://www.hrc.org/resources/glossary-of-terms
- Chiang, H., Ed. (2019). *Global encyclopedia of lesbian, gay, bisexual, transgender, and queer (LGBTQ) history*. Charles Scribner's Sons/Gale.

Women's, Gender, and Sexuality Studies
- Naples, N. A., Editor-in-Chief, Hoogland, R. C., Wickramasinghe, M., Ching, W., Wong, A. (2016). *The Wiley Blackwell encyclopedia of gender and sexuality studies*. Wiley-Blackwell.

Table 1. Resources in Cataloging Terminology for Barnard Library Equity-Minded Practice

Facilitated by and featuring a panel of librarians, faculty, and student collaborators.

- Connect your cataloging, metadata, collections, and liaison librarians to build an event together.
- Reach out to a few faculty and students who you've collaborated with to catalog their open access creations, or work with a student organization on campus that has a library in their organization's office or has created a bibliography or done a research project.
- Work together to find a core set of open access resources that students would benefit from finding in the catalog.
- Invite students for snacks and cataloging.
- Start by inviting students to describe themselves in a word or a phrase on a Post-it on the wall. Librarians should start this off by having done this themselves to share in the vulnerability and create support.
- Project on another wall a few select catalog records. Some that we've used are records for the books *Living on the Borderlines: Stories* by Melissa Michal (New York: Feminist Press, 2019); *Fierce Femmes and Notorious Liars: A Dangerous Trans Girls' Confabulous Memoir* by Kai Cheng Thom (Montreal: Metonymy Press, 2016); and *Decolonizing Ethnography: Undocumented Immigrants and New Directions in Social Science* by Carolina Alonso Bejarano (Durham, NC: Duke University Press, 2019). Ask folks to pair up and discuss and then share with the group what they notice about naming in these records.
- Share a brief presentation and talk from the librarians about what the catalog is, what the search interface does, and how people of color, queer people, and people of more than one of these and other historically marginalized identities have created controlled vocabularies and why. Then share a brief presentation and talk from the faculty and students about their experience collaborating to add resources to the catalog.
- Project or share large printed posters of the open access resources you plan to add to the catalog next. Ask the attendees to write the words they would use to search for these, the words they would like to see and that would be affirming in these records.
- Discuss these as a group and pass around a sign-up sheet to share the records once they are cataloged.
- Share a feedback form asking if the attendees think about the catalog and/or research differently now. Invite them to talk with you about becoming librarians.

ADDITIONAL RESOURCES

Association of College & Research Libraries. (2020). *Framework for information literacy for higher education*. Retrieved from http://www.ala.org/acrl/standards/ilframework

Association of College & Research Libraries. (2020). Scholarly communication toolkit: Scholarly communication overview. Retrieved from: https://acrl.libguides.com/scholcomm/toolkit

Association for Library Collections and Technical Services. (2020). About us. Retrieved from http://www.ala.org/alcts/about

Example Open Access Resource Catalog Records:
- Futterman, A., & Kaba, M. (2019). Radical Black women of Harlem walking tour. Barnard Center for Research on Women. Barnard College Library Record. Retrieved from https://clio.columbia.edu/catalog/14635444
- Spade, D., & Dector, H. (2019). Queer dreams and nonprofit blues: Dilemmas of the nonprofit tradition in LGBT organizing. Barnard Center for Research on Women. Barnard College Library Record. Retrieved from https://clio.columbia.edu/catalog/14300688