SACO Training Needs Assessment Report 2023

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Finalized 7 July 2023

Overview

The Subject Authority Cooperative Program (SACO) Training Needs Assessment 2023 was developed by the Library of Congress Program for Cooperative Cataloging (LC PCC) SACO Team between January and March 2023. Team members include Heidy Berthoud, Nancy Cooey, Dorie Kurtz, Amy Phillips, Veronica Ranieri, and Robert Sicre. Tara Hagan, though not on the PCC SACO Team, assisted tremendously with the assessment design and scope. All members of the Policy, Training, and Cooperative Programs (PTCP) Division Management Team had input on the assessment before it went live.

The assessment was open for just over two weeks, from March 31 to April 14. During this period, 90 unique responses were collected.

Purpose

The assessment was designed to collect feedback on existing documentation, tools, and training provided by PTCP in support of PCC SACO. We also gathered data on how different training formats were prioritized by respondents.

The assessment included five mandatory questions (three Likert scale, one rank priority, and one yes/no) and two optional open-ended questions. Depending on the response to the yes/no question, an additional question was triggered to collect name and contact information.

Quantitative analysis

The training needs assessment collected fixed data on five different questions. Three of these questions used a Likert scale, a bipolar scaling method which measures positive or negative responses to a statement. A fourth asked respondents to rank options according to personal priority. These four questions will be expanded on here. The fifth yes/no question is covered in Appendix A: Volunteer trainers.

Question 1: I find existing documentation and/or training modules helpful when creating new proposals.
Method: Likert scale

Question 1 presented respondents with seven existing modes of documentation and training relating to Library of Congress vocabularies and classification:

- Subject Headings Manual (SHM)
- Classification and Shelf Listing Manual (CSM)
- Library of Congress Demographic Group Terms Manual (LCDGT Manual)

- Library of Congress Genre Form Terms Manual (LCGFT Manual)
- Library of Congress Medium of Performance Terms Manual (LCMPT Manual)
- Catalogers Learning Workshop: Library of Congress Classification course (CLW: LCC)
- Catalogers Learning Workshop: Library of Congress Subject Headings course (CLW: LCSH)

Respondents were asked to rate each existing form of documentation or training as "Very helpful," "Somewhat helpful," or "Not at all helpful." Participants could also select "I have never used this."

Detailed results

For the SHM, 53% find the documentation "Very helpful"; 36% find the documentation "Somewhat helpful"; and 2% find the documentation "Not at all helpful." 8% of respondents have never used the SHM. Of the 83 respondents who report using the SHM, 58% find the documentation "Very helpful," while the overwhelming majority (97%) find the documentation to be at least "Somewhat helpful."

For the CSM, 39% find the documentation "Very helpful"; 36% find the documentation "Somewhat helpful"; and 7% find the documentation "Not at all helpful." 19% of respondents have never used the CSM. Of the 73 respondents who report using the CSM, 48% find the documentation "Very helpful," while the overwhelming majority (92%) find the documentation to be at least "Somewhat helpful."
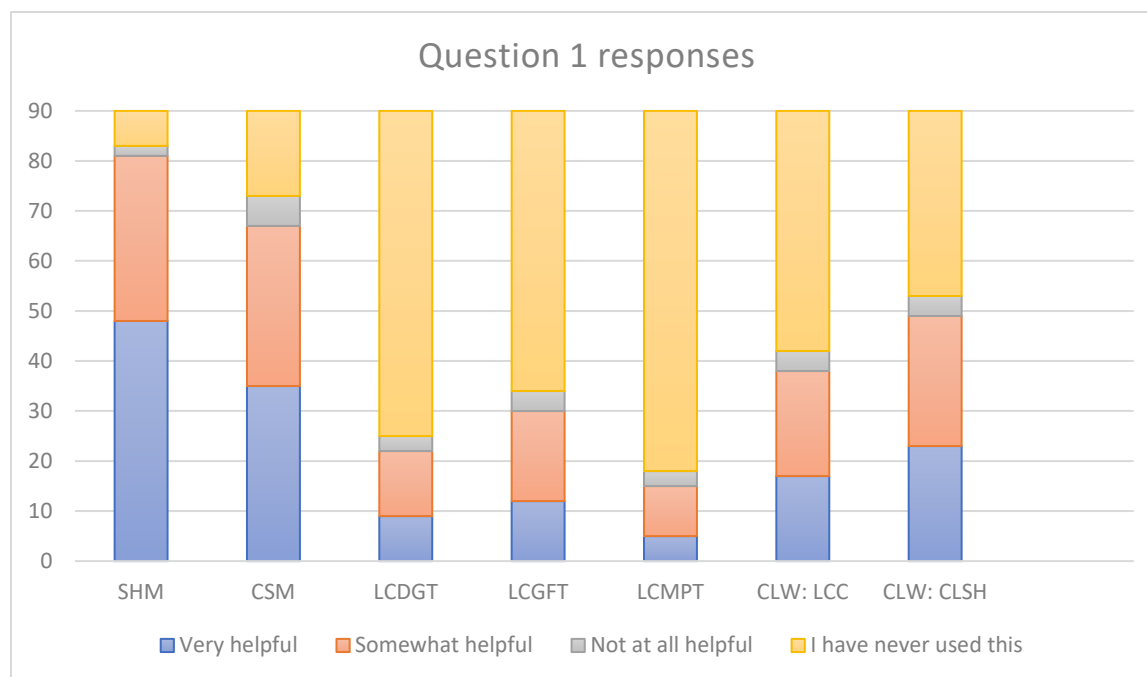
For the LCDGT Manual, 1% find the documentation "Very helpful"; 14% find the documentation "Somewhat helpful"; and 3% find the documentation "Not at all helpful." 72% of respondents have never used the LCDGT Manual. Of the 25 respondents who report using the LCDGT Manual, 36% find the documentation "Very helpful," while the overwhelming majority (88%) find the documentation to be at least "Somewhat helpful."

For the LCGFT Manual, 13% find the documentation "Very helpful"; 20% find the documentation "Somewhat helpful"; and 4% find the documentation "Not at all helpful." 62% of respondents have never used the LCDGT Manual. Of the 34 respondents who report using the LCGFT Manual, 35% find the documentation "Very helpful," while the overwhelming majority (86%) find the documentation to be at least "Somewhat helpful."

For the LCMPT Manual, 6% find the documentation "Very helpful"; 11% find the documentation "Somewhat helpful"; and 3% find the documentation "Not at all helpful." 80% of respondents have never used the LCDGT Manual. Of the 18 respondents who report using the LCMPT Manual, 28% find the documentation "Very helpful," while the overwhelming majority (83%) find the documentation to be at least "Somewhat helpful."

For the CLW: LCC course, 19% find the course "Very helpful"; 24% find the course "Somewhat helpful"; and 4% find the course "Not at all helpful." 53% of respondents have never used the CLW: LCC course. Of the 42 respondents who report using the CLW: LCC course, 35% find the course "Very helpful," while the overwhelming majority (90%) find the course to be at least "Somewhat helpful."

For the CLW: LCSH course, 43% find the course "Very helpful"; 29% find the course "Somewhat helpful"; and 4% find the course "Not at all helpful." 41% of respondents have never used the CLW: LCSH course. Of the 53 respondents who report using the CLW: LCSH course, 43% find the course "Very helpful," while the overwhelming majority (92%) find the course to be at least "Somewhat helpful."

Question 1 responses

Legend: Very helpful | Somewhat helpful | Not at all helpful | I have never used this

Categories: SHM, CSM, LCDGT, LCGFT, LCMPT, CLW: LCC, CLW: CLSH

Conclusions

The majority of respondents who use our resources find them to be at least somewhat helpful. One of our goals then will be to increase the level of usage overall. We will review methods of outreach and advertising, and make sure that resources are readily accessible and easy to locate on our websites.

With regards to the SHM, one responder commented: *"The SHM is more for using LCSH than for making proposals, so it can be easy to miss the instructions that are actually relevant to making proposals."* It might behoove us to separate instructions for proposals from instructions for application in bibliographic records. This could mean creating a "Proposal instructions" section of the SHM, or creating an entirely separate manual.

Very few respondents have used LCDGT, LCGFT, or LCMPT, though this is not surprising. These are more specialized vocabularies, and they have not yet been fully adopted, even at the Library of Congress. As we begin to adopt these vocabularies broadly, we will need to advertise existing materials.

Two long-standing training programs, available via Catalogers Learning Workshop, have relatively low usage: 53% of respondents have not used the LCC course, and 41% of respondents have not used the LCSH course. This was surprising, since many of the comments explicitly called for more training. It could be that these programs do not meet training needs, or it could be that we are simply not advertising these programs successfully. If we embark on updating or recreating this kind of multi-module program, additional analysis will be needed to confirm that we are expending time and labor creating a product that 1) we will advertise effectively; and 2) the community will use.

Question 2: I find the existing proposal forms in ClassWeb easy to use.
Method: Likert scale

Question 2 measured ease of use of existing forms. The question presented respondents with five existing proposal forms relating to Library of Congress vocabularies and classification:

- Library of Congress Classification (LCC)
- Library of Congress Demographic Group Terms (LCDGT)
- Library of Congress Genre Form Terms (LCGFT)
- Library of Congress Medium of Performance Terms (LCMPT)
- Library of Congress Subject Headings (LCSH)

Respondents were asked to rate this statement as relating to each form on a scale of "Strongly agree," "Agree," "Disagree," or "Strongly disagree." Participants could also select "I have never used this form."

Detailed results

For LCC, 8% "Strongly agree"; 33% "Agree"; 15% "Disagree"; and 3% "Strongly disagree." 40% of respondents have never used this form. Of the 54 respondents who report using the form, 69% either "Agree" or "Strongly agree" that the form is easy to use, while 31% "Disagree" or Strongly disagree" with this statement.

For LCDGT, 2% "Strongly agree"; 10% "Agree"; 3% "Disagree"; and no one selected "Strongly disagree." 84% of respondents have never used this form. Of the 14 respondents who report using the form, 78% either "Agree" or "Strongly agree" that the form is easy to use, while 22% "Disagree" with this statement.

For LCGFT, 3% "Strongly agree"; 15% "Agree"; 3% "Disagree"; and 1% "Strongly disagree." 67% of respondents have never used this form. Of the 21 respondents who report using the form, 81% either "Agree" or "Strongly agree" that the form is easy to use, while 19% "Disagree" or "Strongly disagree" with this statement.

For LCMPT, 2% "Strongly agree"; 5% "Agree"; 3% "Disagree"; and no one selected "Strongly disagree." 89% of respondents have never used this form. Of the 10 respondents who report using the form, 70% either "Agree" or "Strongly agree" that the form is easy to use, while 30% "Disagree" with this statement.

For LCSH, 15% "Strongly agree"; 42% "Agree"; 15% "Disagree"; and 7% "Strongly disagree." 20% of respondents have never used this form. Of the 72 respondents who report using the form, 58% either "Agree" or "Strongly agree" that the form is easy to use, while 42% "Disagree" or "Strongly disagree" with this statement.

Question 2 responses

Legend: Strongly agree, Agree, Disagree, Strongly disagree, I have never used this form
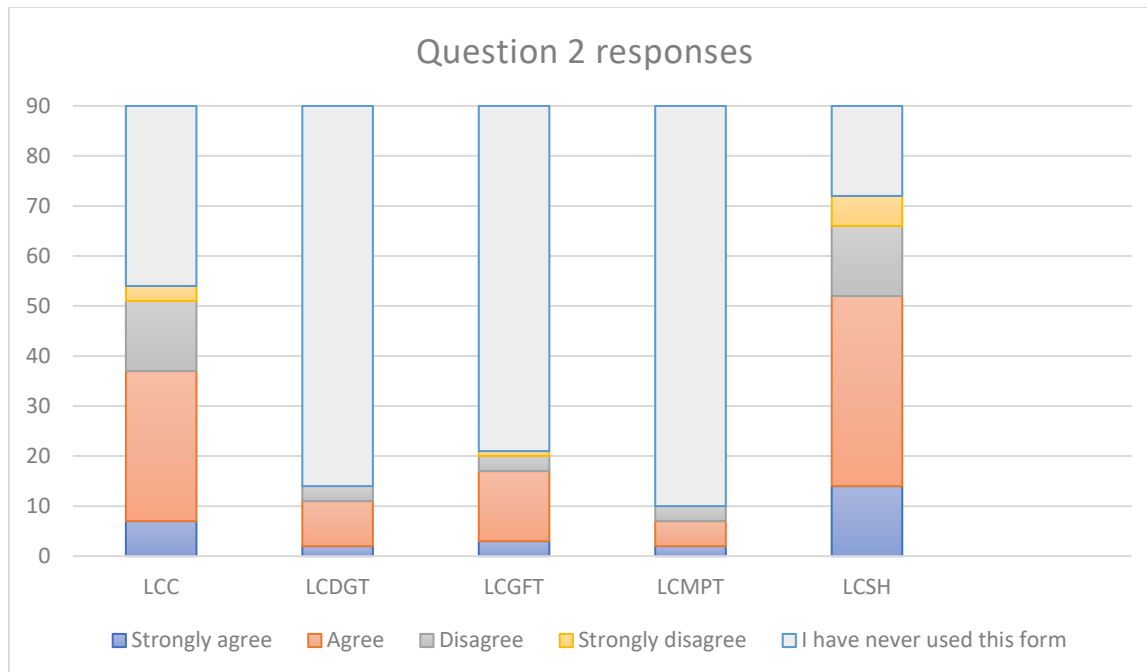
Conclusions

The majority of respondents who have used the forms at least "Agree" that the online proposal forms are easy to use. There are several suggestions in the assessment feedback on how to improve form accessibility and functionality (more details below, and in Appendix C: Complete list of ClassWeb problems and recommendations). This implies that the foundation we have in ClassWeb is functional, and the overall performance could be further improved with some considered adjustments. PTCP will use the feedback received via this assessment to prioritize ClassWeb changes for the current and upcoming fiscal year.

Again, a separate issue is that many respondents have never used these forms. It could be that they simply are not engaged in making certain types of proposals, or it could be that overall confidence in and training on the system needs to be improved.

Question 3: When I submit proposals, I am confident that I have researched and formatted them according to existing guidelines

Method: Likert scale

Question 3 measured confidence in preparing proposals. The question presented respondents with five existing types of proposals relating to Library of Congress vocabularies and classification:

- Library of Congress Classification (LCC)
- Library of Congress Demographic Group Terms (LCDGT)
- Library of Congress Genre Form Terms (LCGFT)
- Library of Congress Medium of Performance Terms (LCMPT)
- Library of Congress Subject Headings (LCSH)

Respondents were asked to rate this statement as relating to each form on a scale of "Strongly agree," "Agree," "Disagree," or "Strongly disagree." Participants could also select "I have never submitted a proposal."

Detailed results

For LCC, 15% "Strongly agree"; 33% "Agree"; 10% "Disagree"; and 1% "Strongly disagree." 40% of respondents have never submitted a proposal. Of the 54 respondents who report submitting a proposal, 84% either "Agree" or "Strongly agree" that they are confident in the process, while 16% "Disagree" or Strongly disagree" with this statement.

For LCDGT, 4% "Strongly agree"; 8% "Agree"; 2% "Disagree"; and no one selected "Strongly disagree." 85% of respondents have never submitted a proposal. Of the 13 respondents who report submitting a proposal, 85% either "Agree" or "Strongly agree" that they are confident in the process, while 15% "Disagree" with this statement.

For LCGFT, 5% "Strongly agree"; 12% "Agree"; 4% "Disagree"; and no one selected "Strongly disagree." 78% of respondents have never submitted a proposal. Of the 20 respondents who report submitting a proposal, 80% either "Agree" or "Strongly agree" that they are confident in the process, while 20% "Disagree" with this statement.

For LCMPT, 3% "Strongly agree"; 4% "Agree"; 2% "Disagree"; and no one selected "Strongly disagree." 90% of respondents have never submitted a proposal. Of the 9 respondents who report submitting a proposal, 78% either "Agree" or "Strongly agree" that they are confident in the process, while 22% "Disagree" with this statement.

For LCSH, 20% "Strongly agree"; 48% "Agree"; 12% "Disagree"; and 3% "Strongly disagree." 17% of respondents have never submitted a proposal. Of the 75 respondents who report using the form, 81% either "Agree" or "Strongly agree" that they are confident in the process, while 19% "Disagree" or "Strongly disagree" with this statement.

Question 3 responses

Legend: Strongly agree · Agree · Disagree · Strongly disagree · I have never submitted a proposal
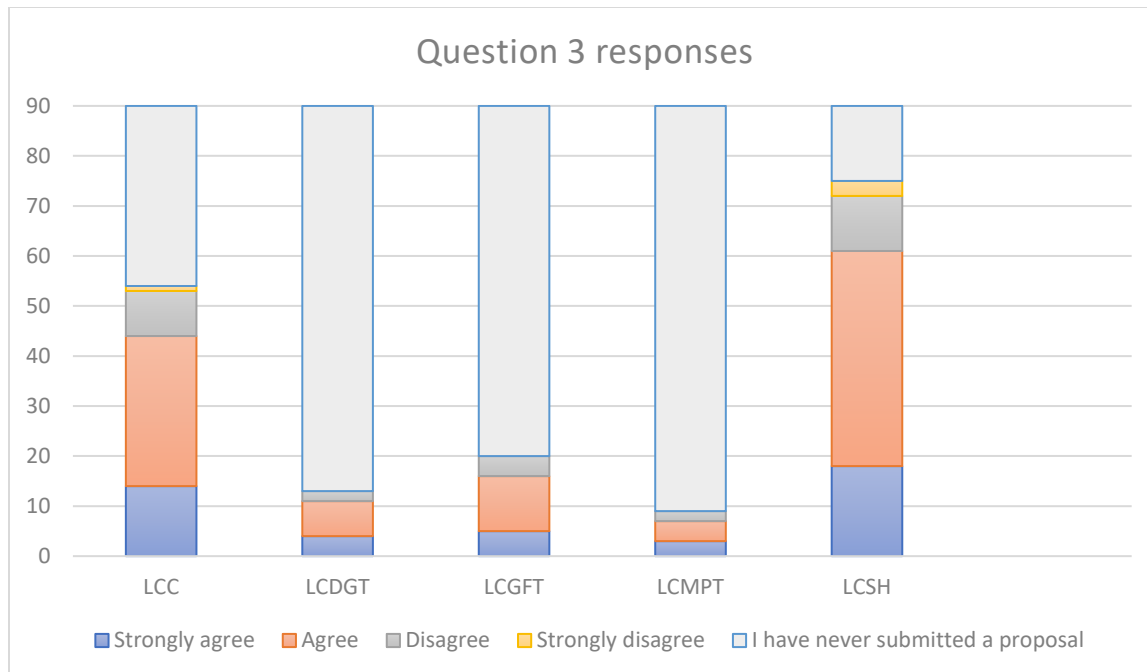
Conclusions

The majority of respondents at least "Agree" that they can make proposals with confidence. However, the majority of comments received specifically address training needs. Some of these comments indicate that respondents are not confident enough to even submit a proposal in the first place. Therefore, they are represented in the category of respondents who have never submitted a proposal in ClassWeb.

Based on assessment comments, even respondents who are confident recognize the need to continually improve skills and provide training to onboard new SACO participants. Training is vital to improving and maintaining confidence in the process.

Question 5: Please rank the following training formats from highest to lowest priority, with 1 being the highest priority and 4 being the lowest
*Method: Priority ranking*

Question 5 asked respondents to rate four potential training formats from the highest to lowest priority:

- Cheat sheets and/or checklists
- Quick introductions to various topics (1-5 minute videos)
- Recordings on technical topics, for example, establishing entities in the name or subject file (15-30 minute videos)
- Recordings on types of headings, for example, buildings and other structures (15-30 minute videos)

Detailed results

Cheat sheets and/or checklists was the overwhelming top priority of the available options, with 61 respondents (68%) ranking it number 1. Ranks 2-4 were much closer, as illustrated by the charts below.

CHEAT SHEETS AND/OR CHECKLISTS

QUICK INTRODUCTION VIDEOS (1-5 MINUTES)

RECORDINGS ON TECHNICAL TOPICS

RECORDINGS ON TYPES OF HEADINGS
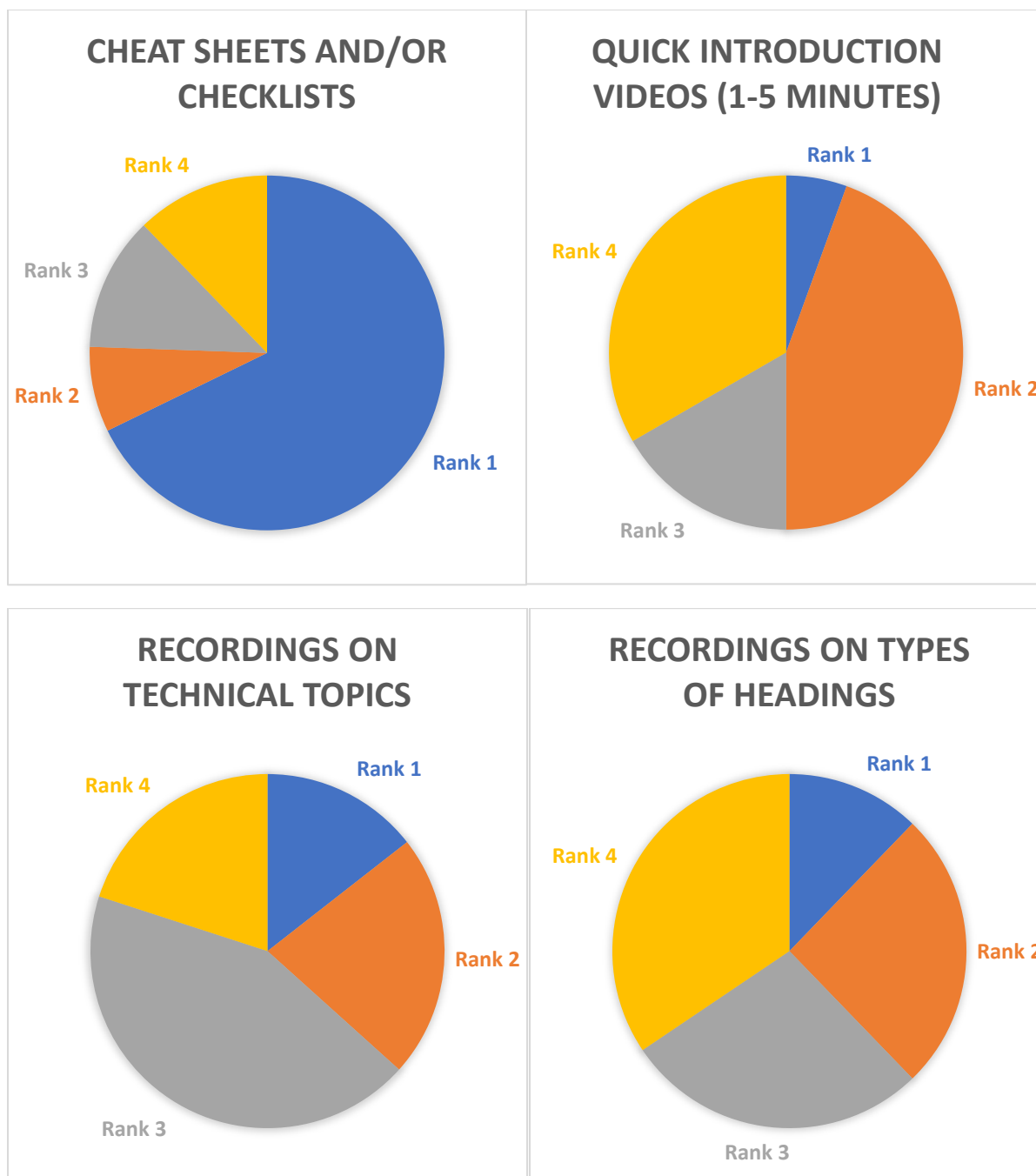
Conclusions

When developing new training materials, we will start with cheat sheets and checklists first. All new training documentation or recordings will be collected on the SACO website and advertised via SACOLIST. Though not specifically listed as an option in the assessment, several commenters also called for "well-maintained and detailed examples," or "well-put-together proposals for each form." These kinds of examples could easily be wrapped into a brief cheat sheet for each type of proposal form.

Recorded trainings, for both technical topics or "types of headings" trainings, were clearly of lower priority. Because of this, exploring what can be done with cheat sheets, checklists, and examples is the

best possible short-term goal. Devoting time and labor to video productions can be a medium-term, or "as needed" goal.

There were also a number of comments asking for live training or an "office hours" kind of question-and-answer dynamic. These formats were not offered because of time and workload constraints within PTCP. However, it may be worth offering such sessions on a quarterly basis. Not everyone learns well through reading examples or watching videos, and it would be good to present a diverse range of training modes, even if some of them can be offered in a limited way or on set schedules only.

Qualitative analysis

The assessment also had two optional, open-ended questions where respondents could provide feedback either to clarify earlier responses, or to provide general thoughts on the SACO program. Between these two questions, 69 comments were collected. The complete list of comments is available in Appendix B.

For the purposes of this report, select comments have been grouped under a few major themes that deserve close attention.

Training

The vast majority of comments touched on training. People want to receive training in a variety of ways: there were comments about office hours; in-person training; month-long training courses similar to NACO; and mentoring. However, there were also comments that indicated some respondents would most appreciate well-maintained examples.

In order to support a diverse membership population, we need to have training options that will satisfy a variety of different learning styles. The SACO lead is in the process of crafting a multi-year training plan that will try to balance membership needs with PTCP workload constraints.

Select comments

I think that SACO work (and the community of people doing it) deserve a full LC/PTCP-designed official training session similar to what exists for NACO, which takes place over a few weeks (or preferably a month -- two weeks is too short for the NACO training given the exercises/hw one has to do between live sessions) and provides complete modules, live webinars with expert trainers, and exploration of case studies/real examples of how to handle ambiguous situations.

Every time I go to make a proposal I am always extremely uncertain if I did anything correctly, or even whether I should be proposing it in the first place. What I could never find was a simple list of what is required for each type of subject heading. I think NACO documentation is better about this overall.

Well-maintained and detailed examples would be more helpful than training videos for me.

LC needs to have regular sessions and new staff should have proposals reviewed by staff who are designated as reviewers by PTCP. This would speed up the process by reducing errors and teaching staff how to use the instruction sheets. Office hours virtual/real life would be good for internal and external clients.

Guidance for researching and submitting proposals is unclear and confusing. We would have been lost at the start without the help of willing mentors.

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My one suggestion is to simplify both the instruction, means of access, and process for ClassWeb proposals. It's clear to me because of previous training, but if I were new to the system itself I don't necessarily think that it is the easiest to understand and often organizations lack the time, funding, and staff to provide easy to understand but also comprehensive training in this and other tools.

Confidence

Confidence was raised multiple times in the comments. Sometimes, it was confidence that could be resolved through more training and experience, such as knowing where to find all documentation, or having more examples that people could use in their work.

In one instance, confidence about asking for help on list was raised, because the SACOLIST can be "intimidating" and "there's a lot of rudeness on listservs". This is not an issue that can be resolved through training or documentation, and must be resolved through committing ourselves to provide inclusive spaces for catalogers across a spectrum of career experiences. Otherwise, we will not succeed in drawing new and different viewpoints to this work.

Select comments

I think it would be so valuable to have an email list (not a listserv) where experienced SACO catalogers (maybe a group of 10 or so who volunteer?) can field questions from people working on proposals. This doesn't have to be terribly formal or even be run by PTCP. It's really intimidating to email any big lists and there's a lot of rudeness to how people reply on listservs (not from PTCP, from the general members of the lists). Sometimes you need help with a specific question and the documentation isn't enough, you need advice from a person who has done a lot of the work. Thanks for putting together this survey, I look forward to seeing what comes out of it!

I have done quite a bit of name authority work since starting as a beginning cataloger. However, I have not felt comfortable enough to submit a subject authority, so I have not created any subject authorities yet.

I have never submitted a proposal to SACO but part of that is because I don't feel that I fully understand the process or parameters of how changes and additions to SACO work.

I am confident about the research required for proposing new/changes to LCSH but not about the formatting of the proposals, especially for proposed changes to existing headings. I would welcome some sort of best practices documentation for this.

Every time I go to make a proposal I am always extremely uncertain if I did anything correctly, or even whether I should be proposing it in the first place. What I could never find was a simple list of what is required for each type of subject heading. I think NACO documentation is better about this overall.

While I believe my proposals are researched and formatted properly, I'm never 100% sure I've looked in all the right places.

Re-establishment of SACO reviewers would be a great asset. I have done training but lack confidence and colleagues at other libraries speak a lot of rejection rates and long waiting times for approval.

Proposal forms

As indicated by our qualitative data, the foundation of the forms in ClassWeb appears solid. The suggestions we received ranged from small design changes (spelling out "Broader terms" instead of using the abbreviation BT) to changes that require more in-depth coding and programming (including a "Submit" button to remove the step of emailing proposals to SACO). There is also a lot of interest in being better able to track proposals as they move through the editorial process.

We have compiled a list of ClassWeb upgrade suggestions, and discussion is ongoing in PTCP. Because of budget constraints, it will be necessary to prioritize changes, and approved changes may be implemented over the course of months or even years. If any suggestions are impossible, we will let members know why.

A complete list of ClassWeb upgrade suggestions is located in Appendix C.

Select comments

The way to add references in LCC is not intuitive and having to save the record and return to it is confusing and cumbersome. The limitations of the LCSH proposal form (no field 034, no field 451 for topical proposals, etc.) means that notes need to be made and surely makes extra work on your part.

The proposal system forms are ok but there could be improvements. One example is we are abbreviating BT, RT, UF, when it's not necessary. There are no character limits so there's no reason to not just say Use For. It's also not clear that if you click a radio button then "Insert Field" the field will be inserted right under the one you selected. It's a you only know if you know situation. There must be some way to add a "Submit for Review" option. A lot of people don't know you have to email SACO when the record is ready, so the records sit in limbo for years with the cataloger not knowing why there's no progess. Could links to the latest policy guidelines be embedded into the forms so people have those handy? It can feel like all the documentation meant to help is spread out in different places and you're never sure what the current guidelines are.

Please provide a more user-friendly form for non-SACO institutions to submit a new heading proposal or change proposal. The usability of the current PDF form is very low

The LCSH form is not user-friendly - I can insert only one field at a time; I cannot reorder the fields; I can insert only the fields listed in the pull-down menu (not all the MARC tags are listed); I can increase the size of the 670 field but it doesn't "stick" - when I return to the page, the 670 automatically reverts to a small box.

The cumbersome process of submitting a form and then emailing to confirm that the form has been submitted needs to be addressed asap. It would greatly improve the reputation of the LCSH proposal process to see this work more like a ticket system, where anyone could see the status of submitted proposals, to see if/when additional steps need to be taken, and if a proposal has already been submitted for a particular heading or group of headings. I'd also like to see just one or two trainings aimed at non-SACO librarians, who are just curious about how the process works. All librarians should know how LCSH are maintained and who does this work, and a 15-minute video elaborating on the "Process for Adding and Revising Library of Congress Subject Headings" page could help address misunderstandings. Thanks for considering additional training!

Copying certain characters from the Web can often introduce invalid MARC. The system should identify these and inform catalogers of the problems. Also if term accidentally put in 053 and saved, it can't be reopened and corrected. Adding new fields would be helpful (e.g. 034 for geographic coordinates). Would be great to be able to link demonyms in LCDGT proposals to their related geographic places.

Another peeve: headings tagged 151 that shouldn't have a 781 because they have subdivisions but the system adds a 667 note when saving the record which then has to be deleted. And some templates don't offer all the possible MARC tagging needed for 4XXs.

It would be great if once we submitted a proposal, we knew the status of it. You send an email to saco@loc.gov and it's radio silence for months at a time and you have no idea what the delay is.

Accessibility

There were several comments that spoke directly to the accessibility of our resources. Moving forward, accessibility considerations should be built into our documentation and training, not just for SACO, but across PCC and PTCP. This is aligned with PCC Strategic Direction 6, *Assess and improve PCC operations through the lens of Accessibility, Diversity, Equity and Inclusion (ADEI) principles*.

Select comments

Please provide more up to date training on NACO and SACO, and for all others! Also, please include closed captions for those who need them.

Training on formatting outside Minaret helpful for those of us who submit indirectly through funnels and can't access. If you make videos please provide a transcript version so I am not forced to watch a video.

Appendix A: Volunteer trainers

The assessment provided an opportunity for respondents to volunteer as trainers if they had a particular area of expertise; this was a required yes/no question. If a respondent selected yes, it triggered an additional question that asked for name, contact information, and area of expertise.

There were 12 respondents who answered "yes" when asked if they wanted to assist with training; however, one declined to leave their name and contact information, so the final list of volunteers is 11:

Name	Expertise
Isabel Quintana	Archaeological sites and extinct cites
Charles Riley	African languages
Margaret Hughes	Class proposals, LCSH proposals for languages and ethnic groups
Oksana Osborne	Geographic (especially parks, monuments, rivers and watersheds), conceptual topics
Michelle Cronquist	African American SACO Funnel; geographic proposals

Cynthia Earman	Family names, geological headings (it has been a while), events, archaeological sites, military operations, battles
Adam Schiff	geographic places, biological names, languages, natural science, LGBTQ, LCDGT, LCGFT
Roger Kohn	LCSH
Ronda L. Sewald	Geographic headings, possibly ethnomusicology and folklore but it's been many years since I've worked in that area.
Leonard "Leo" Martin	SACO Music Funnel Coordinator
Jay Shorten	Literature classification; towns

The first meeting for the volunteer training group is scheduled for Thursday, 6 July.

Appendix B: Complete list of comments

The SHM is more for using LCSH than for making proposals, so it can be easy to miss the instructions that are actually relevant to making proposals.

I have seen the need for more training for a long time, so I really appreciate you doing this survey. Thank you!

None at this time. Thank you for all your hard work!

It does not seem that PTCP welcomes requests or suggestions to update SHM. The documentation could definitely benefit from some updates.

(1) It would be great if Minaret defaulted to a bigger text box for 670 fields. (2) Sometimes things come up in the monthly editorial meetings that would be useful to share more widely, such as the idea of organizational warrant (list 2202). (3) We would greatly appreciate a simple, streamlined method to create more validation records for free-floating subdivisions that exist as both $x and $v; there are many situations where only one of the types is established and it impacts automated authority control processing.

The way to add references in LCC is not intuitive and having to save the record and return to it is confusing and cumbersome. The limitations of the LCSH proposal form (no field 034, no field 451 for topical proposals, etc.) means that notes need to be made and surely makes extra work on your part.

The proposal system forms are ok but there could be improvements. One example is we are abbreviating BT, RT, UF, when it's not necessary. There are no character limits so there's no reason to not just say Use For. It's also not clear that if you click a radio button then "Insert Field" the field will be inserted right under the one you selected. It's a you only know if you know situation. There must be some way to add a "Submit for Review" option. A lot of people don't know you have to email SACO when the record is ready, so the records sit in limbo for years with the cataloger not knowing why there's no progess. Could links to

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the latest policy guidelines be embedded into the forms so people have those handy? It can feel like all the documentation meant to help is spread out in different places and you're never sure what the current guidelines are.

I think it would be so valuable to have an email list (not a listserv) where experienced SACO catalogers (maybe a group of 10 or so who volunteer?) can field questions from people working on proposals. This doesn't have to be terribly formal or even be run by PTCP. It's really intimidating to email any big lists and there's a lot of rudeness to how people reply on listservs (not from PTCP, from the general members of the lists). Sometimes you need help with a specific question and the documentation isn't enough, you need advice from a person who has done a lot of the work. Thanks for putting together this survey, I look forward to seeing what comes out of it!

The review time before a heading is approved is concerning.

Please provide a more user-friendly form for non-SACO institutions to submit a new heading proposal or change proposal. The usability of the current PDF form is very low

Guidelines are clear to me, but working with other funnel participants with less training is a challenge.

ClassWeb should be free for all funnel coordinators regardless of affiliation.

Please provide more up to date training on NACO and SACO, and for all others! Also, please include closed captions for those who need them.

More training, please!

I have done quite a bit of name authority work since starting as a beginning cataloger. However, I have not felt comfortable enough to submit a subject authority, so I have not created any subject authorities yet.

I have never submitted a proposal to SACO but part of that is because I don't feel that I fully understand the process or parameters of how changes and additions to SACO work.

I think it could be very beneficial to have a SACO training process similar to the trainings offered for NACO participants, especially if the program could help connect new contributors to established contributors in a mentoring process that goes beyond the review stage.

I think that SACO work (and the community of people doing it) deserve a full LC/PTCP-designed official training session similar to what exists for NACO, which takes place over a few weeks (or preferably a month -- two weeks is too short for the NACO training given the exercises/hw one has to do between live sessions) and provides complete modules, live webinars with expert trainers, and exploration of case studies/real examples of how to handle ambiguous situations.

It's complicated. I don't envy you.

I am confident about the research required for proposing new/changes to LCSH but not about the formatting of the proposals, especially for proposed changes to existing headings. I would welcome some sort of best practices documentation for this.

Every time I go to make a proposal I am always extremely uncertain if I did anything correctly, or even whether I should be proposing it in the first place. What I could never find was a simple list of what is required for each type of subject heading. I think NACO documentation is better about this overall.

While I believe my proposals are researched and formatted properly, I'm never 100% sure I've looked in all the right places.

The LCSH form is not user-friendly - I can insert only one field at a time; I cannot reorder the fields; I can insert only the fields listed in the pull-down menu (not all the MARC tags are listed); I can increase the size of the 670 field but it doesn't "stick" - when I return to the page, the 670 automatically reverts to a small box.

citing a pattern in LCSH can be tricky due to inconsistencies in LCSH construction over time.

The biggest bugaboo for LCSH is uncertainty as to what and how much justification is necessary to propose a heading. More clarity on that would be very helpful.

Formatting can be a little confusing for 6XX fields, and examples of well-put-together proposals for each form would be a huge help.

Well-maintained and detailed examples would be more helpful than training videos for me.

I believe there should be more in-depth training on SACO proposals, outside of how to use the ClassWeb system. The SACO proposal process can be complicated (figuring out what is appropriate to propose, researching that proposal, deciding on 1XX forms, 4XX variant forms, appropriate 5XX hierarchy, scope notes, appropriate numbers of 670s with enough but not overwhelming detail, 680 scope notes, 952 patterns, etc.). There should be more guidance about how the process could work, how to research, and so on, akin to the in-depth NACO training that exists.

The inability to accommodate UTF-8 is frustrating for patrons of African language materials.

I find ClassWeb generally clunky and not easy to navigate.

A lot of the links in the Web Resources for SACO proposals section (https://www.loc.gov/aba/pcc/saco/resources.html) are broken.

I've consulted the LCDGT, LCGFT, and LCMPT manuals for guidance on submissions, but they seem to only describe existing headings rather than proposal workflows and guidance. Also, CYAC guidance seems to be missing from this survey. (Even if it may be handled by a separate division, it's not clear to non-LC folks. It'd be nice to have guidance on how to handle (who to contact, proposal guidance, and how to submit) available on/ accessible from SACO guidance.

An update to the SACO Participants manual would be ideal, since this provides information on every step of creating proposals (including statistics).

I feel more confident with LCSH because I've submitted these proposals for years. I just submitted by first LCGFT proposal and found it challenging, but I did find the manual very helpful.

Could use more focused examples of proposals. Need sections on what to do if a classification area is too tight. Need staff able to meet to discuss issues before review.

LC needs to have regular sessions and new staff should have proposals reviewed by staff who are designated as reviewers by PTCP. This would speed up the process by reducing errors and teaching staff how to use the instruction sheets. Office hours virtual/real life would be good for internal and external clients.

Guidance for researching and submitting proposals is unclear and confusing. We would have been lost at the start without the help of willing mentors.

The cumbersome process of submitting a form and then emailing to confirm that the form has been submitted needs to be addressed asap. It would greatly improve the reputation of the LCSH proposal process to see this work more like a ticket system, where anyone could see the status of submitted proposals, to see if/when additional steps need to be taken, and if a proposal has already been submitted for a particular heading or group of headings. I'd also like to see just one or two trainings aimed at non-SACO librarians, who are just curious about how the process works. All librarians should know how LCSH are maintained and who does this work, and a 15-minute video elaborating on the "Process for Adding and Revising Library of Congress Subject Headings" page could help address misunderstandings. Thanks for considering additional training!

It would be great if once we submitted a proposal, we knew the status of it. You send an email to saco@loc.gov and it's radio silence for months at a time and you have no idea what the delay is.

Copying certain characters from the Web can often introduce invalid MARC. The system should identify these and inform catalogers of the problems. Also if term accidentally put in 053 and saved, it can't be reopened and corrected. Adding new fields would be helpful (e.g. 034 for geographic coordinates). Would be great to be able to link demonyms in LCDGT proposals to their related geographic places.

Another peeve: headings tagged 151 that shouldn't have a 781 because they have subdivisions but the system adds a 667 note when saving the record which then has to be deleted. And some templates don't offer all the possible MARC tagging needed for 4XXs

an option for "unsure" or "neither agree nor disagree" would be useful

I think it would be nice to let users know that they are allowed to attend the LoC Subject Editorial Meetings. Witnessing debates about various proposals has helped with my training, and it took some time for me to realize that the public is allowed to attend. I also believe that the training videos need to be updated. I very much appreciate the quizzes attached to the training, however, the classification training is especially glitchy.

It's often unclear when one should submit an LCC proposal for an A-Z list. It's also completely unclear (to me at least) when or whether a LCGFT proposal should be submitted in some cases. To wit, just for one example: "Insect surveys The meeting does not wish to establish terms for surveys of specific animals. The genre/form term Zoological surveys should be assigned to the work being cataloged, along with subject headings for the insect(s) being surveyed. The proposal was not approved." How is a SACO participant expected to guess which genres the meetings wishes to establish?

Guidance on geographic names needs to be updated and maintained.

I believe the LCC form in Minaret changed within the past year or so, but it's more difficult to navigate/use in its current form.

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i am not authorized to submit proposals.

If possible, prefer in-person training.

It is hard to find most current rules and documents// Hope to see a class offered for Subject Cataloging to learn virtually or in-person// Hope to get an email before rejected if it needs some clarification.

It might be helpful to have couple good proposals as examples

Where is the hotlink to what these terms mean and stand for--SACO,LCDGT,LCGFT, LCMPT? It would be a help to doing this survey.

Please do not use the offensive term "one shot." DEI training would tell you why. DEI sensibilities should be accommodated throughout the Library. *(Author's note: Thank you for your comment. The assessment was update to remove this term.)*

I would benefit from live LCDGT and LCGFT training.

I would appreciate live Zoom training sessions on LCDGT and LCGFT usage and proposals. Thank you.

SACO training is extremely useful even for librarians who have a certain level of expertise in it because it is a continuing learning process and one always gains a new knowledge and skills after undergoing this useful train ing. The only question and concern would be who w trainer will be? It really matters to have well-seasoned Trainer with a high level of experience and expertise.

Please provide more info on training/resource availability directly to LC staff. The majority of staff are not on the listservs, not particularly encouraged to pursue professional development, and in a post-reorg "hybrid" environment acquisition functions are given priority over cataloging functions.

I have my supervisor and my coworkers go over my proposals to make sure I have done them correctly.

It would be nice if PTCP returned to providing training (classes) for in house LC catalogers first.

thanks for reviewing the system and considering improvements

When I submitted classification proposals, I have to open the existing numbers or proposed numbers by other institutions to make sure I filled in the form correctly.

I am the coordinator of a Funnel. We were told not to share the training recordings with the non CORE participants. It would be very helpful if the training materials could be posted on the SACO web page.

Re-establishment of SACO reviewers would be a great asset. I have done training but lack confidence and colleagues at other libraries speak a lot of rejection rates and long waiting times for approval.

I have routed all proposals through a funnel coordinator and have not personally used the forms.

Training on formatting outside Minaret helpful for those of us who submit indirectly through funnels and can't access. If you make videos please provide a transcript version so I am not forced to watch a video.

With respect to ease of use and how much I agree to the aspects of the questions above, I can say that much of my response is self-taught or internally taught from co-workers but without any formal training in how to "properly" utilize the training and documentation or even ClassWeb itself.

My one suggestion is to simplify both the instruction, means of access, and process for ClassWeb proposals. It's clear to me because of previous training, but if I were new to the system itself I don't necessarily think that it is the easiest to understand and often organizations lack the time, funding, and staff to provide easy to understand but also comprehensive training in this and other tools.

The LCSH proposal interface is much!! easier now that we don't have to fuss with clunky workarounds for diacritics. I only noticed the option to add the OCLC record # for the work cataloged about a year ago, not sure how critical that is. Also not clear about how important it is to sleuth out records to be changed, as a possible influence on decision to accept proposal. I have only recently begun to submit change proposals, 'empowered' by such work by others, and by the fact that every change proposal I've done so far has been accepted.

I completed the LCSH courses for Technicians when I was a technician, but I have not had opportunity to take the LCSH course for Catalogers since I have been in my new librarian position. Now that I have gained familiarity with many topics, it would be very effective to have more guidance about subject assignment and alleviate some of the struggles.

Form ongoing and systematic training is much needed.

Appendix C: Complete list of ClassWeb problems and recommendations

1. Default to larger text box for 670 fields.
2. Add additional MARC fields to the available options in the drop-down menu. (For example: 034, 451).
3. Do not abbreviate BT, RT, UF, etc.
4. When doing insert field, have option to insert above or below the selection.
5. Add "Submit for review" workflow directly to ClassWeb.
6. Embed links to latest policy documentation.
7. Be able to insert multiple fields at once.
8. Be able to reorder fields.
9. Accommodate UTF-8.
10. Convert ClassWeb to work like a ticketing system, where anyone could see the status of submitted proposals.
11. Provide a list of characters that shouldn't be used in the system.
12. Terms accidentally added to the 053 and saved can't be corrected.
13. System generates 667 notes where they aren't needed.
14. Make ClassWeb free to funnel coordinators regardless of affiliation.