*Spotlight*

The GFO Recataloging Project

Steve Turner, Librarian

If you have used the Gfo library collection in the last few months, you may have noticed evidence of the changes that are being made to how books and other items are numbered and (to a lesser extent) how the collections are arranged. We have undertaken a project to re-catalog the entire library collection and the look of call numbers and the order they establish for certain items in the collection are part of what is changing.

When we successfully "migrated" from our old computer cataloging system to opals (Open-source Automated Library System) in January 2014, we had the opportunity to take advantage of powerful new features that had not been available with our old computer catalog. Very significantly, a large portion of the quick and irregular catalog records we had in the old system could now be easily upgraded to "industry standard" MarC (Machine-Readable Cataloging) records, including multiple subject headings to enhance subject searching.

For an example, say we had a book entitled *Bogardus and Allied Families* that included major sections on Tagliarini and Fong descendants, even though these surnames were not listed in the title. Previously, the book would have been assigned a call number like **929.2 B643**. That would lead you to find the book in the family genealogies, more or less in alphabetical order for Bogardus. However, there would be nothing in the catalog to lead you to the book's significant content on the Tagliarinis or Fongs. With an upgrade to a MarC record, this book now could show up not only when you search for Bogardus, but also under Tagliarini or Fong. When fully implemented, this feature alone will make opals a far more powerful tool for locating the information you need in our collection. However, the record for each book or other item must be upgraded individually, so it is hardly an instant process. We will not find a MarC record to match every item, but we want to upgrade all the records we can. As part of this effort, some trained volunteers are working their way through the family genealogies from both ends (A forward and Z back), replacing the old records with "imported" MarC records whenever available. The result is vastly improving access to more of
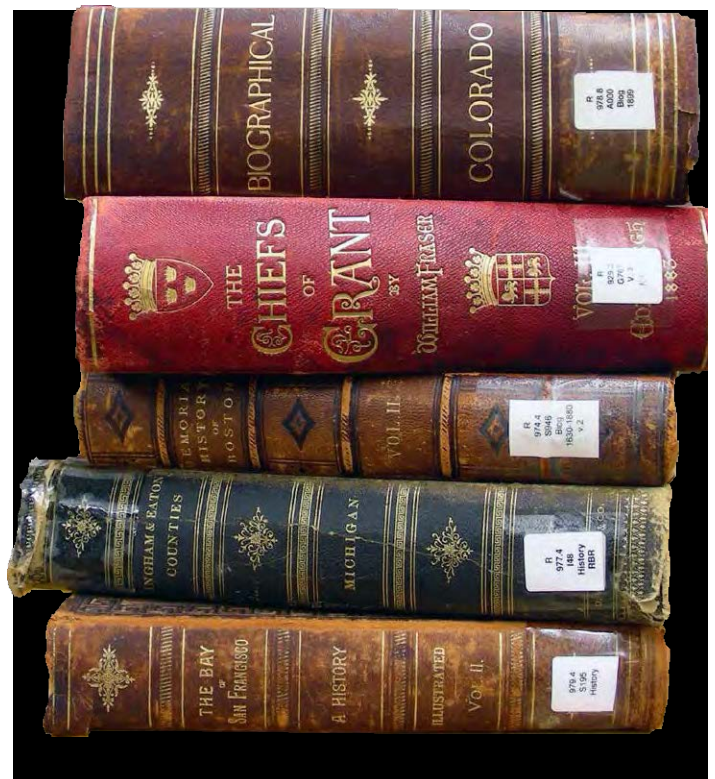
the content in these books. Similarly, subject headings will help us locate many other useful resources where, as is so often the case, the titles give a very inadequate description of contents. MarC records also offer fuller bibliographic details generally and often correct errors in our old homegrown records.

However, upgrading the catalog records in opals is only one aspect of the recataloging project we have undertaken. When the Library Committee contemplated going systematically through our collections to convert to MarC records, it was clear that we would simultaneously have the opportunity to make changes to call numbers, to relocate misplaced items, to address the problem of too many books with identical call numbers, and even to redesign the call number system itself. While we were still working up to the migration to opals, the Library Committee spent several months debating and deciding how best to change our call number system to improve the organization of the collections. With the goals of consistency, simplicity, and serviceability somewhat competing, we worked out new criteria for call numbers in considerable detail. After much preparation by volunteer Becky Clark so that all our old catalog was successfully fed into opals, we began the huge task of replacing the old records with MarC records and applying the new call number system, focusing on one collection area at a time.

Because the re-cataloging is now well under way but far from complete, the committee thought it was

Charles Cutter

important for library users to understand what is going on and why. This article is a cataloger's equivalent to a "Pardon our Dust" sign.

STARTING THE PROCESS: THE NORTHWEST SCHOOLS COLLECTION

We began with what used to be loosely called "the Oregon yearbooks collection." It has been redesignated as the Northwest Schools (NWs) collection and is now defined to include all school-related books for Oregon, Washington, Idaho, and Alaska. My job was to assign appropriate call numbers to every book, in accordance with the new-style format upon which the Library Committee had agreed. For this collection each call number was headed by "NWs." Then the changes were made in opals, at the same time improving many records for accuracy, fullness and consistency. Two major changes in the call number structure were initiated, and a significant change to the order of the books in the NWs collection was made by means of the way the numbers were applied.

First, the old-style call numbers had used an obsolescent system known as "Cutter numbers" to designate counties, cities, etc. It was developed by New England librarian Charles Cutter in the 1880s to place books in alphabetical order (more or less) with short codes such as **M961 P852**, these examples specifically standing for Multnomah County and Portland. This elaborate system was perhaps too clever by half and has largely been abandoned by libraries over the last half-century or so. Our new-style call numbers will instead simply use the first four letters in most cases, so **Mult Port**, which is far more recognizably meaningful while just as short. All the Oregon and Washington counties can be designated in this way with no problems. However, there are inevitably situations where just the first four letters will not achieve the desired alphabetization, which is the problem the Cutter system was designed to solve while keeping the labels short. Idaho, for example, has both Bonner and Bonneville Counties, therefore, either more than four letters or some creativity would be required for our method to work. In this case, I decided **Bonr** and **Bonv** would work fine, though in some other cases I have gone with five or even six-letter codes when necessary. I had to identify and decide on codes for all the counties that need exceptions to the general rule, and I have to keep in mind which ones they are, but the result is a far shorter list than the two I previously had to consult for every county (and every other name) to be encoded.

Second, the Gfo traditionally used **A000** to indicate all "state-wide" or multi-county books in order to file them before the books alphabetized by counties. We decided to eliminate all these **A000**s by splitting each state's "Dewey" number in two: Oregon, formerly **979.5**, is divided into **979.50** (equivalent to **979.5 A000**) and **979.55**, to contain all the Oregon county-by-county books. Similarly, every other state is having a **0** added to its old Dewey number for statewide books and a **5** for county-by-county books.

The significant change in the order of books in the NWs collection was made by treating all individual college and university yearbooks, histories, and alumni directories as statewide books (by giving them the "**0**" numbers,) instead of filing them by county and city in which the school is located as we did under the old system. We felt this makes better sense for our purposes because college students typically come from a much broader area than the local community where the colleges are located. This way, you can search for a person's college yearbook even if you do not know the college by going through all the colleges, now in a single alphabetical sequence, and checking the likely years for each. It was more difficult when you had to determine the county and city of each college first.

Another minor adaptation in the NWs section was using **3** as another add-on to the state numbers (**979.53** for Oregon) in order to make a place between the college and K-12 groups for those statewide books which are about schools or education but not related to specific

Earlier this year we decided to assign new-style numbers to all items being newly added to our collections even if they were going into an area not yet revised. This unfortunately can only raise the level of confusion involved in having two somewhat different systems of organization going at once. A certain amount of intendent chaos is thus bound to get worse before it goes away.

In the balance of this article, I would like to give some additional background about the nuts and bolts of call number systems, how ours has been designed, and how we mean to improve it.

THE GFO AND DDC

The familiar Dewey Decimal Classification system (DDC) was developed in 1876 by Melvil Dewey, another creative librarian who was a contemporary of the aforementioned Charles Cutter. It has proven to be a reasonably effective system for most American public and school libraries as it is straightforward—at least the general public can readily grasp it well enough to find what they are looking for, given specific numbers from a library catalog. At its best, the system groups similar and related items together, which makes for productive browsing. Another good feature is that DDC is adaptable, and has been revised many times over the years to accommodate new subjects, ongoing historical developments, new technologies, etc. However, like any complex system, it has various weaknesses. Academic and research libraries have mostly adopted a different system, originated by Cutter and further developed by the Library of Congress, that is better suited for very large collections with lots of specialized and often technical material. One reason is that to achieve the degree of specificity needed to organize such collections in a useful manner, Dewey numbers tend to become quite long and unwieldy.

For a fairly large and specialized genealogy collection like ours, DDC offers some useful elements but is hardly as well adapted as it could be. When DDC was developed, family genealogies were almost the only kind of genealogy materials to be found. The periodic revisions of DDC have never addressed the later proliferation of resources useful for genealogical research, nor how it would be most useful to organize them for that purpose. DDC does provide a well-developed system of numbers (the **940**s to **990**s) corresponding to continents, regions, countries and their smaller geographical subdivisions, down to every individual county in the U.S. These are generally usable for organizing genealogical materials relating to specific geographical areas, though DDC's geographical logic is often at odds with what would be

Melvil Dewey

colleges. As most of these relate to both K-12 and higher education in a state, they logically go between the K-12 and higher education groupings.

THE PROJECT MOVES ON . . .

It took many weeks to complete the NWs project as we worked out details of how to accomplish it. Once it was completed and deemed a success, we moved on to other collections: cassette tapes, oversize books, the Ready Reference shelf, the Atlas case, the microfiche, and the City Directory collection. All these have since been upgraded in OPALS, given new call numbers, re-labeled, and reshelved according to the new numbers. Most items are in much the same order as before, but the new call numbers have been used to improve the order of individual items, particular groups, or whole collections where appropriate.

For example, I developed new numbers while tackling the cassettes, the great bulk of which are how-to presentations. (The cassettes were previously arranged chronologically according to their order in the schedules of the conferences where the workshops were originally presented, which was not a very user-friendly or meaningful scheme.) The how-to books in the main collection that are not geographically limited will also be assigned these new numbers as appropriate when time permits. Until then, however, some cassettes and books with closely related content will have different Dewey numbers.

U.S. states will be divided with two numbers like 979.50 and 979.55 for Oregon. The U.S. number, 973, which has been followed by A000 for every item with that number, already had subdivision (state) numbers from 974 through 979, so those A000s served no actual function and could be eliminated entirely. The same is true for other numbers like 971 (Canada), for which there were already separate numbers for the provinces. For most other countries where one Dewey number was used before, a country will now have two successive numbers, like 948.1 for Norway as a whole and 948.2 for Norway's subdivisions. (Because the Dewey numbers for foreign countries are not in a uniform pattern like the fifty sequential numbers for the fifty U.S. states, the expedient of adding -0 and -5 to split them was not generally the best option, particularly for keeping all the foreign numbers as short as possible. Like the U.S. and Canada, each country will have one number for countrywide materials and the next following number or numbers for materials relating to geographical subdivisions.)

This involved some changes to the Dewey's country numbers, but it also allowed opportunities for reassigning some numbers to work better in the context of genealogy. Major changes for this purpose were made in two areas, one for the British Isles and the other for Canada. The British Isles sequence in Dewey was as follows: 941 Great Britain/British Isles generally, 941.1 Scotland, 941.5 Ireland, 942 England, and 942.9 Wales. The new sequence is 941 Great Britain/British Isles/UK generally, 941.2/.3 England, 941.4/.5 Wales, 941.6/.7 Scotland. 941.9/.95 Northern Ireland (still part of UK), 942 Ireland as a whole, and 942.5/.6 Republic of Ireland. This creates a better match for genealogical materials in the British Isles and UK, as well as a more logical sequence of the areas involved. In each case where there are two numbers for an area the second will be used for the counties or other subdivisions of that area.

Dewey's U.S. state numbers are in a generally logical and rather useful order for genealogical purposes. They start with New England, work down the Atlantic Coast through the other original colonies, swing across the deep south and then up to and through the old Northwest and Midwest, then the Great Plains, and finally the Far West. This follows the historical development of our country about as well as possible, while also providing appropriate numbers for the many regional items. For Canada, however, Dewey's numbers for the provinces went from west to east for some reason, starting with British Columbia and working back to Ontario, Quebec and the Maritimes. For our purposes, it makes much better sense for Canada's country-wide materials to be followed immediately by those for Quebec, which for a time was essentially equivalent to Canada, then by Ontario and the Maritimes which developed next, then to move across the plains to BC and finally to the northern regions. Therefore, while 971 still designates Canada, the order of the provinces in our collection is to be more or less reversed, following the oldest-to-youngest historical drift of the U.S. pattern which has a more meaningful relationship to genealogical content of historical materials.

For a similar reason, Virginia and West Virginia's numbers have been switched (formerly 975.5 and 975.4, respectively, now the reverse) so that the mother state (Virginia) now precedes its daughter (West Virginia). And Hawaii, placed by Dewey in the Pacific Ocean (996.9) where it logically belonged in the 1880s, has now become the 50th U.S. state at the Gfo with new numbers 979.90/979.95, following Alaska at 979.80/.85. (Puerto Rico, if it ever becomes a state, may have to linger in the Caribbean for a while, as there is no convenient logical vacancy for it in the U.S. numbers.)

By the time you read this, the Virginia/West Virginia switch should be nearly complete and we may be into the British Isles brouhaha or the Canadian chaos. Then the switchover for other states, countries, and all the rest of the main collections will be ongoing for a considerable time. Other number changes will be worked out as we get into certain areas. Some tables for the new numbers will be posted, but be sure to check the opals catalog for the numbers of any particular items at any given time. If new-style items are not in the new order, they might still be found in the old order, or elsewhere being processed. There will surely be some confusion about how new-style items will be filed in not-yet-revised areas; so just as you have learned to try umpteen different spellings for a family name, try various theories as to where anything might have been shelved. This, too, will pass as the project ultimately nears completion.

If you would like to help accelerate the recataloging process, we could certainly use more volunteers, especially for the opals revisions. We hope the end result (after thousands of volunteer hours to be lavished on this project) will be a vastly improved catalog and a perceptibly improved arrangement of our collections, including a call number format that is easier to follow, more meaningful, and more helpful in finding what you need in your research.

In the meantime, do not hesitate to ask for help, volunteer if you can, be flexible, and do please Pardon our Dust!

most logical for genealogical materials. Genealogy-related materials without a particular geographic focus tend to end up scattered randomly here and there across the rest of the numbers: Jewish research at **296**, immigration at **325**, cemeteries at **393**, handwriting at **411**, genetics at **616**, photography at **770**, etc.

The Gfo's early librarians adapted the DDC to a genealogy collection with a couple of very effective expedients. First, while DDC adds extra digits to the state numbers to designate individual counties and larger cities in a roughly geographical but quite unpredictable sequence, for the Gfo it was decided to put the counties in each state in alphabetical order. The DDC order (followed by the Family History Library in Salt Lake City) has some advantages in that neighboring counties may to some degree end up shelved next to or near each other, but a linear series of counties is far short of faithfully reflecting the layout of a state map. Delaware works fine because there are only three counties in a row. But for a state like Texas with 254 counties, many bordered by six or eight others, the way the Dewey numbers snake through the state can at best place only two neighboring counties beside any given county, and many adjoining counties may end up quite a distance apart on the shelves. Also, the numbers have to have three extra digits to accommodate anything over 99 counties. Because the order is unpredictable, you have to consult the catalog or an alphabetical list first to learn the call number for any given county. Given the ease and convenience of finding counties predictably in alphabetical order, I think the Gfo folks made the wiser choice, to alphabetize the counties. Even though the early Gfo librarians also adopted the then widely used Cutter system generally, which in effect disguised the county names rather than just truncating or abbreviating them, users could still easily determine how to locate a given county within a state without having to consult the catalog.

The Gfo's other major adaptation of DDC to genealogy was the set of "Plain English" categories that follows the geographic portion of Gfo call numbers from **940** on. Whether these were developed here or borrowed from elsewhere, I do not know. Our Plain English designations are coded for most of the common types of genealogical resources, such as **Bible**, **Cem**[etery], **Cens**[us], **Church**, **Court**, **Ethnic**, etc. The Family History Library (fHl) uses a similar set of category codes that look like Cutter numbers, so again their meaning is quite disguised. The advantage of our Plain English is that you can readily discern what the designations mean; the disadvantage is that the categories are filed in an alphabetical order (as

with the six examples above) to which there is no other logic relating to content. (fHl's coding, for example, places Bible records alongside vital records, not preceding bibliographies.) Regardless of the details, some system to supplement the DDC becomes a necessity for a genealogy library in order to group similar items in a logical manner. This is especially true for heavily represented counties (most notably Multnomah for us), and for whole states or whole countries, especially the U.S., for which we have hundreds of countrywide items that need some useful grouping. We have kept the same Plain English categories, standardized which ones to abbreviate and how, and added a couple of new ones: **Tax**, **Vote**, and **Nat**[uralization]. We have also split the two most heavily represented categories, **Mil**[itary] and **Hist**[ory], by adding **-Yr** and **-Au** before their subdivisions to catalog by years or by an alpha code for the author, title, or a subject. Thus we now have **Mil-Yr 1861-1865** for Civil War books, or **Mil-Au Scot** for a book filed within the military grouping by author Scott; **Hist-Yr 1753-1880** for a history with a defined scope of years, and **Hist-Au Shen** for any of several histories of the Shenandoah Valley region. Note that in the last example, the **Shen** codes not for an author but for an important subject element; using the same **-Au** code in this way allows related items to be grouped together that would otherwise be scattered.

TWEAKING THE GFO'S CALL NUMBERS

When we decided to replace the Cutter numbers for counties, cities, and neighborhoods with straight alphabetical four-letter codes (adapted as necessary for exceptional situations), it followed that we would also replace the Cutter elements of all call numbers throughout our collections with straight alpha designations. For author names on how-to books, histories, etc., we also chose to stick with the limit of four letters to keep the numbers short. For family histories/genealogies, we decided the family names would be best spelled out in full. Typically, 3-5 letters are appropriate for coding in various other circumstances such as school names, ethnic groups, church denominations, etc. I am developing lists to try to keep codes consistent.

The ubiquitous **A000**, which had been needed to separate statewide items from those relating to various counties, could be eliminated altogether if every geographical area had not just one Dewey number but two (or more): the first for the area-wide items and the second and any additional numbers for geographical subdivisions of the same area. As noted above in the section on the Northwest Schools collection, all the