# Drafting the Inclusive Metadata Statement
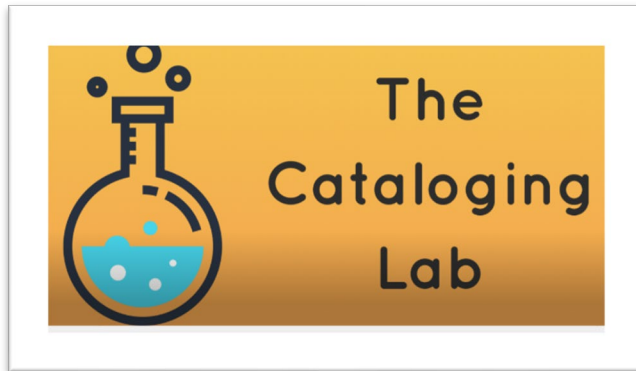
## SHAY BEEZLEY & KAITLYN PALONE

### UNIVERSITY OF CENTRAL OKLAHOMA

# What Is an "Inclusive Metadata Statement"?

**Also known as...**

- "Statement on Potentially Harmful Language"
- "Statement on Critical Cataloging"
- "Ethical Cataloging Statement"
- "Historical Language Advisory"

The Cataloging Lab

"statement on harmful or offensive language in description and bias in cataloging"

# State of the Cataloging Profession

**Increased Call for Addressing Problematic Metadata**
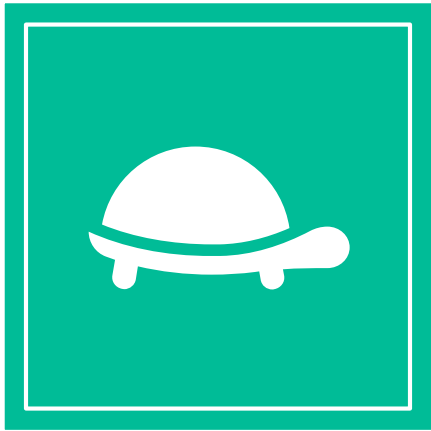Calling out LCSH has been around for a while...

**"Illegal Aliens" Subject Heading**
...but it's become more prominent as libraries have been making localized changes in light of partisan response to proposed removal of "illegal aliens" subject heading

**Increased Transparency of Bureaucratic Processes**
Catalogers have been working to explicate the subject heading creation and revision process (SACO)

# Why Draft an Inclusive Metadata Statement?

**Explanation of Bureaucracy**

**Empathy for Users**

**Commitment to Progress**

# Background

# UCO's Professional Catalogers



**Shay Beezley**
**Assistant Director**
**9 years as a professional cataloger**

**Kaitlyn Palone**
**Librarian I**
**5 years as a professional cataloger**

**Anona Earls**
**Librarian II**
**8 years as a professional cataloger**

UNIVERSITY LIBRARIES
The UNIVERSITY of OKLAHOMA

## Metadata Justice Working Group

- Created the accepted proposal for revision of Tulsa Race Riot -> Tulsa Race Massacre subject heading
- UCO catalogers met with the group to discuss this process

1. Identification of the need to formalize and articulate our approach

2. Formation of Oklahoma SACO Funnel

# We Received A Survey From ELUNA

Discussion with UCO library administration on our existing practices

Discussion lead to 3 tasks:
1. Create statement
2. Identify strategies
3. Create a reporting form

**DEI in Search Advisory Group**
- Distributed survey to Ex Libris users asking for feedback on practices libraries currently use to address problematic terminology

# Our Process

## Task 1
Draft an inclusive metadata statement

## Task 2
Identify inclusive metadata strategies

## Task 3
Create a form for users to report offensive terminology

## Review
2 rounds of review (first with area director and final review with executive director)

## Release
Published in the About section of our website

# Task 1: Draft an Inclusive Metadata Statement

## Task 1

**Draft an inclusive metadata statement**

1. **Reviewing existing statements**

2. **Decide on a name**

3. **Create an outline**

4. **Write!**

- We went through the list on The Cataloging Lab and read as many statements as possible

- Our initial task was to identify the ones we liked best and why

- Our favorite statements focused on actions specifically taken

## Task 1

**Draft an inclusive metadata statement**

1. **Reviewing existing statements**
2. **Decide on a name**
3. **Create an outline**
4. **Write!**

- No standard name for this type of proclamation
  - "Acknowledgment of bias"
  - "Statement of ethical description"

- Inclusive Metadata
  - Phrasing aligns with UCO's Inclusive Community initiative

## Task 1

**Draft an inclusive metadata statement**

1. **Reviewing existing statements**

2. **Decide on a name**

3. **Create an outline**

4. **Write!**

- **Acknowledgement of problematic metadata**
- **Context**
- **What we're committed to doing**

## Task 1

**Draft an inclusive metadata statement**

1. **Reviewing existing statements**

2. **Decide on a name**

3. **Create an outline**

4. **Write!**

- •Write collaboratively
  - •We each took a piece of the outline and wrote the corresponding part

- •Consider word choice carefully
  - •We strongly caution against using the word "decolonize" in any of these statements

# Why We Recommend Against "Decolonize"

- **What exactly are you trying to say with "decolonize"?**

- **Are you violently dismantling structures?**

- **Are you relinquishing control of colonized land and resources and returning them to Indigenous peoples?**

- **Are you saying "decolonize" because it's a social justice buzzword in higher ed?**

*You can't decolonize the catalog…*

*…but you can certainly improve it*

# Acknowledgement

**Who is acknowledging the problem?**

**What is the problem?**

**Where is this problem?**

*Max Chambers Library is committed to serving underrepresented communities. One way we accomplish this is through our professional catalogers' dedication to accurately and respectfully describing materials relating to underrepresented communities. We acknowledge that standards for descriptive practice are entrenched in discriminatory concepts, such as racism, homophobia, ableism, and misogyny. These practices directly affect our users as metadata rooted in discrimination may be visible to our community in Central Search, SHAREOK, the library's website, or the library's digital collections. We are actively taking steps to ameliorate these problematic practices that directly affect the Central community's access to library resources.*

# Background / Library of Congress

Consider the audience

Explain in a user-friendly manner

Not an attack on Library of Congress personnel

*Libraries are not without biases - both conscious and unconscious - that affect policies and practices.* In the case of cataloging and metadata, *the classification of library resources reflects how a cataloger views and interprets the subject matter. We primarily use the classification standards maintained by the Library of Congress*, which have been created by *people with their own biases and judgments from their specific cultures and time periods.*

# Commitment

So what we will do about it?

*By acknowledging weaknesses and flaws in these standards and other areas of librarianship, we aim to support the [University's inclusive community initiative](#) through the following practices:*

# List of Commitments (no. 1-3)

*Cultivate a supportive and safe environment where staff feel encouraged to acknowledge their biases and engage in constructive discussions.*

*Continue to identify areas of bias in the library.*

*Apply metadata using the standards provided by the Library of Congress in a selective manner and use professional judgment for incorporating alternative controlled vocabularies.*

# List of Commitments (no. 4-6)

*Collaborate with Library Systems staff in identifying opportunities for data normalization for vendor-supplied metadata found in Central Search.*

*Commit to actively learning about controlled vocabularies that improve access to resources by or about underrepresented communities.*

*Commit to completion of specialized training and become approved to submit new or revised terminology to the Library of Congress.*

**For you, these are just examples!**

# Before You Commit...

**Do you have the staffing?**
Can you adequately carry out the tasks you want to do? It's ok to start small!

**Are you able to get training?**
What training opportunities are available? What are obstacles?

**Are you able to carry out newly-trained tasks?**
Be professional -- don't waste your trainers' time with not following through on anything!

# Task 2: Identify Strategies

## Task 2

**Identify inclusive metadata strategies**

- **What have we done?**
- **What are we currently doing?**
- **What do we plan to do?**

Purpose
- Provide evidence of action behind words
- Provide examples to large audience
- Show existing projects for those who might want to report something

# Categories

**Offensive/Outdated Terminology**
Verbiage used in standardized library cataloging practices that is based on outdated or offensive language

**Classification**
The basis for creating call numbers, which are used to organize library materials in the physical stacks

**Inclusive Language**
Opportunities to provide more inclusive language in library metadata

# Offensive/Outdated Terminology

| Problem | Action | Status |
|---|---|---|
| "Illegal Aliens" (Library of Congress Subject Headings) | Replaced with "undocumented immigrants" in metadata sourced from WorldCat as part of greater library community initiative | Retroactive removal completed (2020)<br>On-going removal for new materials (2020-present) |

# Classification

| Problem | Action | Status |
|---|---|---|
| The letter "N" to organize materials by, about, or relating to Black people in the library's physical collections | Replace "N" with "B" in call numbers for materials by, about, or relating to Black people - 300 titles affected have been identified for review and reclassifying. | Library of Congress issued change (07/2021) Titles identified in collection (08/2021) Planning underway (09/2021-Present) |

# Inclusive Language

| Problem | Action | Status |
|---|---|---|
| Inadequate options for LGBTQ+ descriptors in Library of Congress Subject Headings | Utilize terms from Homosaurus, a linked data vocabulary designed to be more inclusive of the nuances of the LGBTQ+ community, in addition to existing metadata when appropriate. | Homosaurus identified as an option (2016)<br>Adding terms on-going (2016-Present) |



HOMOSAURUS
AN INTERNATIONAL LGBTQ+ LINKED DATA VOCABULARY

# Task 3: Create A Reporting Form For Users

# Task 3: Creating a Reporting Form

## Task 3

Create a form for users to report offensive terminology

- Contacted other institutions

- Decided on naming the form "Report Offensive/Outdated Terminology"

- Option for users to remain anonymous

# Offensive/Outdated Terminology Form

Please use this form to submit offensive/outdated terminology you encountered in Central Search, SHAREOK, the library's website, or the library's digital collections. Current projects addressing identified problems are listed at Inclusive Metadata Strategies. Questions about this form may be directed to metadata@uco.edu.

Please list the offensive/outdated term: (required)

> *Please list only metadata that is not found on the resource iteself (e.g. table of contents, title, etc.)*

Please provide the citation of the resource whose metadata/descripti[...]ywords included the offensive/outdated term: (required)

> *Please copy/paste the citation (title, author) here*

Where did you see the offensive/outdated term? (required)

○ Central Search

○ UCO Library Website

○ SHAREOK

○ Other

Would you like to be contacted for follow-up?

○ Yes

○ No

SUBMIT

- •Clarification about how we're looking for metadata not found on the item itself

# Final Review and Uploaded to Website

**Once signed off by Executive Director, we uploaded everything to our website**

**Statement**

**Strategies**

**Form**

**But our work is not done!**
**These actions are only just the beginning**

# Recommended Resources

- [The Cataloging Lab: List of Statements on Bias in Library and Archives Description](#)
- [Cataloging Ethics Bibliography](#)
- [CritCat.org](#)
- [CritLib.org: CritCat](#)
- ["Do Not 'Decolonize'. . . If You Are Not Decolonizing: Progressive Language and Planning Beyond a Hollow Academic Rebranding"](#)
- ["Decolonization is not a metaphor."](#)

# Questions?

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