

# **INCLUSIVE METADATA STRATEGIES AT MAX CHAMBERS LIBRARY**

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**Amigos Library Services Conference:**

**Equity, Diversity, and Inclusion In Cataloging & Technical Services**

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# LAND ACKNOWLEDGEMENT

**“The University of Central Oklahoma recognizes that we gather on land entrusted to the care and protection of the Caddo and Wichita peoples. These lands are part of the wider state of Oklahoma which is shared by the 39 sovereign Indigenous Nations including the Kiowa, Comanche, Osage, Apache and Fort Sill Apache Nations, and is associated with the forced relocation of Nations through the Indian Removal Act of 1830. The university was built in Unassigned Land within seized portions of Indian Territory taken from the Cherokee, Choctaw, Chickasaw, Creek, and Seminole Nations by the federal government in 1866. Beginning in 1889, this land was distributed through several Land Runs intended to confine and erase Indigenous peoples from this territory. We acknowledge the historical events that have and continue to affect Indigenous people of this land. We pledge to honor and respect Indigenous knowledges and worldviews as we sustain a meaningful relationship with the Sovereign Nations.”** --[go.uco.edu/landacknowledge](https://go.uco.edu/landacknowledge)



**CHAMBERS LIBRARY**

# INTRODUCTIONS

**Anona Earls**

**She/her**

**Librarian III/Coordinator of Deselection  
9 years as a professional cataloger**



**Shay Beezley**

**She/her**

**Assistant Director**

**10 years as a professional cataloger**



**Kaitlyn Palone**

**She/her**

**Librarian II**

**6 years as a professional cataloger**



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# BACKGROUND

- **Chambers Library is a medium-size academic library in the metropolitan Oklahoma City area**
- **Our cataloging dept is hierarchically located in the Library Systems unit and consists of**
  - **3 professional catalogers (us!)**
  - **4 copy-catalogers**
  - **2-4 student employees**
- **Formalized our process in 2021**



**C H A M B E R S   L I B R A R Y**

# OVERVIEW

**Inclusive  
Metadata  
Statement**

**Report  
Outdated  
/Offensive  
Terminology  
Form**

**Inclusive  
Metadata  
Strategies**

**Professional  
Development**



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# INCLUSIVE METADATA STATEMENT: WHAT & WHY

## Also known as...

- “Statement on Potentially Harmful Language”
- “Statement on Critical Cataloging”
- “Ethical Cataloging Statement”
- “Historical Language Advisory”

## Guiding Principles

- Explanation of Bureaucracy
- Empathy for Users
- Commitment to Progress



# INCLUSIVE METADATA STATEMENT: WHERE

## Inclusive Metadata Statement as published on our library website in 2021

### Current version

<https://library.uco.edu/inclusivemetadata>

The screenshot shows the UCO Chambers Library website. On the left is a navigation menu with the following items: Welcome, Directory, Hours, Floor Maps, Event Calendar, Library News, Policies, Reports, Library Artwork, Library Statistics, Library Transformations, Open Discovery Initiative, **Inclusive Metadata** (highlighted in yellow), Strategies, Severe Weather Info, and Employment. The main content area is titled "Inclusive Metadata Statement".

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### Inclusive Metadata Statement

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, ableism, homophobia, 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.

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.

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:

1. Cultivate a supportive and safe environment where staff feel encouraged to acknowledge their biases and engage in constructive discussions.
2. Continue to identify areas of bias in the library.
3. Apply metadata using the standards provided by the Library of Congress in a selective manner and use professional judgment for incorporating alternative controlled vocabularies.
4. Collaborate with Library Systems staff in identifying opportunities for data normalization for vendor-supplied metadata found in Central Search.
5. Commit to actively learning about controlled vocabularies that improve access to resources by or about underrepresented communities.
6. Commit to completion of specialized training and become approved to submit new or revised terminology to the Library of Congress.

[INCLUSIVE METADATA STRATEGIES](#)   [REPORT OFFENSIVE/OUTDATED TERMINOLOGY](#)



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# REPORT OUTDATED/OFFENSIVE TERMINOLOGY

## Form

<https://library.uco.edu/inclusivemetadata/report>

## Users can submit the following info:

- **Offensive/outdated term**
- **Citation**
- **Where was it found**
- **Would they like follow-up?**

Report Offensive/Outdated Terminology

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 under **Inclusive Metadata Strategies**. Questions about this form may be directed to [metadata@uco.edu](mailto:metadata@uco.edu).

Please list the offensive/outdated term: (required)

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

Please provide the citation of the resource whose metadata/descriptions/keywords 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**



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## REPORT OUTDATED/OFFENSIVE TERMINOLOGY: BEHIND THE SCENES

- **So far, we've only 4 reports from a library staff member concerning some outdated language on the website, but it's a start!**
  - **Example: use of the outdated phrase "Five Civilized Tribes"**
- **We track submissions in an internal spreadsheet that contains the contents of the form submission + documentation of action taken and comments**
- **Internal discussions happening about increasing awareness of form**
  - **Example: FAQ added to LibAnswers <https://uco.libanswers.com/faq/382152>**



# INCLUSIVE METADATA STRATEGIES

## Why include a strategies page?

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

### **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



# OUTDATED/OFFENSIVE TERMINOLOGY: “SEXUAL MINORITIES”

Problem	Action	Status	How
<p>"Sexual Minorities" (Library of Congress Subject Headings)</p>	<ul style="list-style-type: none"> <li>Remove the term “sexual minorities” from metadata sourced from WorldCat and add more specific terminology for materials in the library’s collections and the Center’s library</li> </ul>	<ul style="list-style-type: none"> <li>Retroactive removal completed (2015)</li> <li>On-going removal for new materials (2015-present)</li> </ul>	<ul style="list-style-type: none"> <li>Changes in cataloging procedures</li> <li>Spot-checks through searching catalog</li> </ul>
	<ul style="list-style-type: none"> <li>Implementation of "DEI - List of terms to exclude from subject heading" feature in Central Search for any terms containing "sexual minorities" or "sexual minority"</li> </ul>	<ul style="list-style-type: none"> <li>Feature implemented (January 2023)</li> <li>On-going review of effectiveness (January 2023-present)</li> </ul>	<ul style="list-style-type: none"> <li>Upload text file of terms to exclude to our discovery later (Primo Back Office)</li> </ul>



# DEI - LIST OF TERMS TO EXCLUDE FEATURE: AS SHOWN WITH “SEXUAL MINORITIES”

## Screenshot of search in Primo

The screenshot shows the Primo search interface for Chambers Library. The search criteria are: Subject: Sexual minorities, Keywords: Sexual minorities, AND Any field: Keywords, Enter a search term. The search results are displayed in a list format, showing the first three results:

- 1. BOOK: Working with LGBTQ+ families in foster care and adoption. Online access >
- 2. VIDEO: Transforming History. Online access >
- 3. VIDEO: Out in the Lineup : Uncovering the Taboo of Homosexuality in Surfing. Online access >

The interface also includes a 'Refine My Results' section on the left with options like 'Search outside the library's collections', 'Sort by Relevance', and 'Availability' filters.

## Screenshot of first result bibliographic details

The screenshot shows the bibliographic details for the first search result:

**Title** Working with LGBTQ+ families in foster care and adoption.  
**Additional Title** Working with lesbian, gay, bisexual, transgender, questioning families in foster care and adoption  
**Subjects** Adoption -- United States >  
**Series** Bulletin for professionals  
Bulletins for professionals  
**Publisher** Washington, D.C. : U.S. Department of Health and Human Services, Administration for Children and Families, Administration on Children, Youth and Families, Children's Bureau, Child Welfare Information Gateway  
**Creation Date** 2021  
**Format** 1 online resource (15 pages) : color illustrations.  
**Language** English  
**Type** Book  
**Additional Notes** "June 2021."  
GPO Cataloging Record Distribution Program (CRDP).  
**Contributor** Child Welfare Information Gateway (U.S.), issuing body. >  
United States. Children's Bureau. issuing body. >  
**Record Number** 01UCO\_ALMA51248753740002196  
**Source** 01UCO\_ALMA



# “DEI - LIST OF TERMS TO EXCLUDE” FEATURE

## Pros

- Reduces opportunities for users to encounter marginalizing terminology
- Addresses the problem of not having control over all metadata in Primo (i.e. data sources outside of our catalog, CDI index, etc.)

## Cons

- Phrase sensitive (i.e. must match exactly, not contains)
- Preference for substitution over suppression



# OUTDATED/OFFENSIVE TERMINOLOGY: “ILLEGAL ALIENS/IMMIGRANTS”

Problem	Action	Status	How
"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)  On-going removal for new materials (2020-present)	Alma normalization rule



# OUTDATED/OFFENSIVE TERMINOLOGY: “INDIANS OF NORTH AMERICA”

Problem	Action	Status	How
"Indians of North America" (Library of Congress Subject Headings)	Research best practices for improving access to resources by and about Indigenous peoples	Research in progress (2021-Present)	Reviewing literature on Indigenous knowledge organization
	Added local term "Indigenous Peoples of North America" to metadata records containing "Indians of North America"	Local term added (November 2022)	Normalization rule in Alma



# CLASSIFICATION: .N CUTTER

Problem	Action	Status	How
The letter "N" to organize materials by, about, or relating to Black people in the library's physical collections	<ul style="list-style-type: none"><li>• Replace "N" with "B" in call numbers for materials by, about, or relating to Black people.</li><li>• Identified 367 affected titles and placed on review by Librarians (27 titles determined no longer needed for the collection)</li><li>• Updating call numbers for 340 affected titles</li></ul>	<ul style="list-style-type: none"><li>• Library of Congress issued change (07/2021)</li><li>• Project underway (09/2021-Present)</li></ul>	<ul style="list-style-type: none"><li>• Created text file of call numbers being changed and input into Alma Analytics to generate list</li><li>• Student employee and/or staff project for updating call numbers</li></ul>





# CLASSIFICATION: .O CUTTER

Problem	Action	Status	How
The letter "O" to organize materials by Asian authors in the library's physical collections	<ul style="list-style-type: none"><li>• Replace "O" with "A" in call numbers for materials by, about, or relating to Asian people</li><li>• Identified and updated call numbers for 17 affected titles</li></ul>	<p>Library of Congress issued Change (2022)</p> <p>Project complete (March 2022-December 2022)</p>	<ul style="list-style-type: none"><li>• Searched shelf list in Alma for call numbers being changed</li><li>• Student employee and/or staff project to update call numbers</li></ul>



# INCLUSIVE LANGUAGE: UTILIZING HOMOSAURUS

Problem	Action	Status	How
Inadequate options for LGBTQ+ descriptors in Library of Congress Subject Headings	Utilize terms from <u>Homosaurus</u> , 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)  Adding terms ongoing (2016-Present)	Training copy-catalogers to identify opportunities for Homosaurus terms and appropriate MARC encoding



# INCLUSIVE LANGUAGE: ACKNOWLEDGING RACISM

Problem	Action	Status	How
Lack of acknowledgment of racism in metadata records that contain the subject headings, "minstrel shows" and "minstrel music."	Added the subject headings "Racism against Black people" and "Blackface" to these records.	Completed December 2022	Edited bibliographic records individually (less than 100 affected)



# ALMA NORMALIZATION RULE

Norm rules covers the following:

1. Adding Homosaurus term "LGBTQ+ people" whenever LCSH "Sexual minorities" exists
2. Removes "Sexual Minorities"
3. Replacing "illegal aliens/immigrants" with Noncitizens
4. Adding local term "Indigenous Peoples of North America"

```
Inclusive Metadata Updates
↑ Rule Normalization Drool

rule "swap sexual minorities for LGBTQ+"
when
  ((exists "650 a.Sexual minorities"))
then
  addField "650 {-. 7} a.LGBTQ+ people"
  addSubField "650 {-. 7} 2.homolit" if (exists "650 {-. 7} a.LGBTQ+ people")
end

rule "remove 650 Sexual minorities"
when
  (TRUE)
then
  removeField "650" if (exists "650 a.Sexual minorities")
end

rule "replace illegal aliens"
when
  (TRUE)
then
  replaceContents "650 a.Illegal aliens" with "Noncitizens"
  replaceContents "650 a.Illegal immigrants" with "Noncitizens"
end

rule "Indigenous peoples"
when
  ((exists "650 a.Indians of North America"))
then
  addField "690 {-. 7} a.Indigenous peoples of North America"
  addSubField "690 {-. 7} 2.local" if (exists "690 {-. 7} a.Indigenous peoples of North America")
end
```



# PROFESSIONAL DEVELOPMENT

- **Attending conferences, workshops, webinars as much as possible**
  - **Example: “Creating Culturally Sensitive Headings for Indigenous Topics” workshop**
- **Continuous Cultural Competence requirement at UCO**
- **Hosted inaugural *Metadata Justice in Oklahoma Libraries & Archives Virtual Symposium* in 2022 with plans to host again this summer**



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# **POLL: WHICH PROJECTS ARE YOU INTERESTED IN TRYING?**

**Writing inclusive metadata statement**

**Reporting form**

**Adding terms from other controlled vocabularies**

**Vendor-supplied tools (“exclude’ list, norm rules)**

**All of them!**

# CONSIDERATIONS

- **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!**



# WHAT'S NEXT?

- **Increase awareness on UCO campus about our inclusive metadata initiative**
  - **Example: Visibility of reporting outdated/offensive terminology form**
- **Increase community engagement on UCO campus**
  - **Examples: Request meetings with affinity groups (2SLGBTQIA+, Native American, African American Faculty-Staff Associations); work with campus' gender & sexuality center**





# ADDITIONAL RESOURCES

- Metadata Justice in Oklahoma Libraries & Archives Symposium Proceedings & Slides: <https://shareok.org/handle/11244/336455>
- Drafting the inclusive metadata statement (presentation by Shay & Kaitlyn) <https://hdl.handle.net/11244/331262>
- The Cataloging Lab: <https://cataloginglab.org/>
- CritCat <https://critcat.org/>
  - CritCat Zotero Library: <https://critcat.org/resources/>



**THANK YOU!**