INCLUSIVE METADATA STRATEGIES AT MAX CHAMBERS LIBRARY

Shay Beezley, Anona Earls, & Kaitlyn Palone

Amigos Library Services Conference:
Equity, Diversity, and Inclusion In Cataloging & Technical Services
February 8, 2023
“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
INTRODUCTIONS

Shay Beezley
She/her
Assistant Director
10 years as a professional cataloger

Anona Earls
She/her
Librarian III/Coordinator of Deselection
9 years as a professional cataloger

Kaitlyn Palone
She/her
Librarian II
6 years as a professional cataloger
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
OVERVIEW

- Inclusive Metadata Statement
- Report Outdated Offensive Terminology Form
- Inclusive Metadata Strategies
- Professional Development
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 as published on our library website in 2021

Current version

https://library.uco.edu/inclusivemetadata
REPORT OUTDATED/OFFENSIVE TERMINOLOGY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• Offensive/outdated term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 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
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”

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<tr>
<th>Problem</th>
<th>Action</th>
<th>Status</th>
<th>How</th>
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<tbody>
<tr>
<td>&quot;Sexual Minorities&quot; (Library of Congress Subject Headings)</td>
<td>• 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</td>
<td>• Retroactive removal completed (2015)</td>
<td>• Changes in cataloging procedures</td>
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<td>• Implementation of &quot;DEI - List of terms to exclude from subject heading&quot; feature in Central Search for any terms containing &quot;sexual minorities&quot; or &quot;sexual minority&quot;</td>
<td>• On-going removal for new materials (2015-present)</td>
<td>• Spot-checks through searching catalog</td>
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<td></td>
<td>• Feature implemented (January 2023)</td>
<td>• Upload text file of terms to exclude to our discovery later (Primo Back Office)</td>
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<td></td>
<td></td>
<td>• On-going review of effectiveness (January 2023-present)</td>
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DEI - LIST OF TERMS TO EXCLUDE FEATURE: AS SHOWN WITH “SEXUAL MINORITIES”
"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”

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<tr>
<td>&quot;Illegal Aliens&quot; (Library of Congress Subject Headings)</td>
<td>Replaced with “undocumented immigrants” in metadata sourced from WorldCat as part of greater library community initiative</td>
<td>Retroactive removal completed (2020)</td>
<td>Alma normalization rule</td>
</tr>
<tr>
<td></td>
<td></td>
<td>On-going removal for new materials (2020-present)</td>
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### OUTDATED/OFFENSIVE TERMINOLOGY: “INDIANS OF NORTH AMERICA”

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<tr>
<td>&quot;Indians of North America&quot; (Library of Congress Subject Headings)</td>
<td>Research best practices for improving access to resources by and about Indigenous peoples</td>
<td>Research in progress (2021-Present)</td>
<td>Reviewing literature on Indigenous knowledge organization</td>
</tr>
<tr>
<td></td>
<td>Added local term &quot;Indigenous Peoples of North America&quot; to metadata records containing &quot;Indians of North America&quot;</td>
<td>Local term added (November 2022)</td>
<td>Normalization rule in Alma</td>
</tr>
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### Problem

The letter "N" to organize materials by, about, or relating to Black people in the library's physical collections.

### Action

- Replace "N" with "B" in call numbers for materials by, about, or relating to Black people.
- Identified 367 affected titles and placed on review by Librarians (27 titles determined no longer needed for the collection)
- Updating call numbers for 340 affected titles

### Status

- Library of Congress issued change (07/2021)
- Project underway (09/2021-Present)

### How

- Created text file of call numbers being changed and input into Alma Analytics to generate list
- Student employee and/or staff project for updating call numbers
### Problem
The letter "O" to organize materials by Asian authors in the library's physical collections

### Action
- Replace “O” with “A” in call numbers for materials by, about, or relating to Asian people
- Identified and updated call numbers for 17 affected titles

### Status
Library of Congress issued Change (2022)
Project complete (March 2022-December 2022)

### How
- Searched shelf list in Alma for call numbers being changed
- Student employee and/or staff project to update call numbers
## Inclusive Language: Utilizing Homosaurus

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| 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)  
Adding terms ongoing (2016-Present) | Training copy-catalogers to identify opportunities for Homosaurus terms and appropriate MARC encoding |
## Inclusive Language: Acknowledging Racism

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<tr>
<td>Lack of acknowledgment of racism in metadata records that contain the</td>
<td>Added the subject headings &quot;Racism against Black people&quot; and</td>
<td>Completed December</td>
<td>Edited bibliographic records individually (less than 100 affected)</td>
</tr>
<tr>
<td>subject headings, &quot;minstrel shows&quot; and &quot;minstrel music.&quot;</td>
<td>&quot;Blackface&quot; to these records.</td>
<td>2022</td>
<td></td>
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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
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
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
• 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!