

CULTIVATING A CULTURE FOR INCLUSIVE METADATA

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BACKGROUND



*View of UCO Chambers Library South Entrance
Credit: Luci Seem*

- **Serving the students, faculty, and staff at the University of Central Oklahoma, 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, 4 copy-catalogers, and 2-4 student employees**
- **Position turnover in Systems (Director, Primo administrator)**
- **UCO has had an increased focus on DEI efforts through its Inclusive Community Initiative**



C H A M B E R S L I B R A R Y

AD-HOC APPROACH (2013-2021)

- **Our mission statement: “Metadata & Cataloging... is dedicated to the Library’s mission of connecting the Central community to dynamic resources that support transformative learning by cultivating a collaborative environment **that supports thoughtful and conscientious consideration** of bibliographic description, subject analysis, and emerging methods of metadata application.**
- **Explicitly decided not to use LCSH “Sexual Minorities” for bib records in both our library and campus LGBTQ+ collection**
- **Normalization rule to address “illegal aliens” on Alma side**



FORMALIZED APPROACH (2021-PRESENT)

Inclusive Metadata Initiative

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

**Inclusive
Metadata
Statement**

**Report
Offensive
/Outdated
Terminology
Form**

**Inclusive
Metadata
Strategies**

Symposium



C H A M B E R S L I B R A R Y

INCLUSIVE METADATA STATEMENT



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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



ACKNOWLEDGMENT

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.***



C H A M B E R S L I B R A R Y

Consider the audience

Explain in a user-friendly manner

Not an attack on Library of Congress personnel or colleagues contributing through SACO

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

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:



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LIST OF COMMITMENTS

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



INCLUSIVE METADATA STATEMENT: WHERE

Inclusive Metadata Statement as published on our library website in 2021

Current version

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



- Welcome
- Directory
- Hours
- Floor Maps
- Event Calendar
- Library News
- Policies
- Reports
- Library Artwork
- Library Statistics
- Library Transformations
- Open Discovery Initiative

Inclusive Metadata

- Strategies
- Severe Weather Info
- Employment

Inclusive Metadata Statement

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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 OFFENSIVE/OUTDATED TERMINOLOGY FORM



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REPORT OFFENSIVE/OUTDATED TERMINOLOGY

Report Offensive/Outdated Terminology form as created in 2021

Current version

[https://library.uco.edu/inclusivemetadata/
report](https://library.uco.edu/inclusivemetadata/report)

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.

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 OFFENSIVE/OUTDATED 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>**



IMPROVEMENTS MADE

- **Changes and additions made in 2023**
 - **We added an FAQ**
 - **We are working to increase the visibility of the form**
 - **And we have updated the form to better match how we think people will use the form**



INCLUSIVE METADATA STRATEGIES



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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

Strategy 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



OUTDATED/OFFENSIVE TERMINOLOGY: "SEXUAL MINORITIES"

Problem: "Sexual Minorities" (Library of Congress Subject Headings)

Actions	Status	How
<ul style="list-style-type: none">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	<ul style="list-style-type: none">Retroactive removal completed (2015)On-going removal for new materials (2015-present)	<ul style="list-style-type: none">Changes in cataloging proceduresSpot-checks through searching catalog
<ul style="list-style-type: none">Implementation of "DEI - List of terms to exclude from subject heading" feature in Central Search for any terms containing "sexual minorities" or "sexual minority"	<ul style="list-style-type: none">Feature implemented (January 2023)On-going review of effectiveness (January 2023-present)	<ul style="list-style-type: none">Upload text file of terms to exclude to our discovery later (Primo Back Office)



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 set to "Quick Search (Combined)" with the subject "Sexual minorities" entered in the Keywords field. The search results are displayed in a list format, showing the first three items:

- 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" sidebar on the left and a "SEARCH" button at the bottom right of the search criteria panel.

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: "Illegal Aliens" (Library of Congress Subject Headings)

Action	Status	How
Replaced with “Noncitizens” 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 (originally) before LC changed to Noncitizens



OUTDATED/OFFENSIVE TERMINOLOGY: "INDIANS OF NORTH AMERICA"

Problem: "Indians of North America" (Library of Congress Subject Headings)

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

Actions	Status	How
<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• Library of Congress issued change (07/2021)• Project underway (09/2021-Present)	<ul style="list-style-type: none">• 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

Analytics Report

Folder: [/shared/Community/Reports/Institutions/UCO](#)

Report name: [N Cutter Search - UCO](#)



C H A M B E R S L I B R A R Y

INCLUSIVE LANGUAGE: UTILIZING HOMOSAURUS

Problem: Inadequate options for LGBTQ+ descriptors in Library of Congress Subject Headings

Action	Status	How
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)	Training copy-catalogers to identify opportunities for Homosaurus terms and appropriate MARC encoding
Install <u>OCLC Connexion Homosaurus Macro</u> to aid copy-catalogers with assigning Homosaurus terms	Adding terms ongoing (2016-Present)	

Alma Idea Exchange– Add Homosaurus to Alma Authority Vocabularies

<https://ideas.exlibrisgroup.com/forums/574345-content/suggestions/44436579-add-homosaurus-to-alma-authority-vocabularies>



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”

Alma Normalization Rules

UCO – Inclusive Metadata Updates

```
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.homolt" 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
```



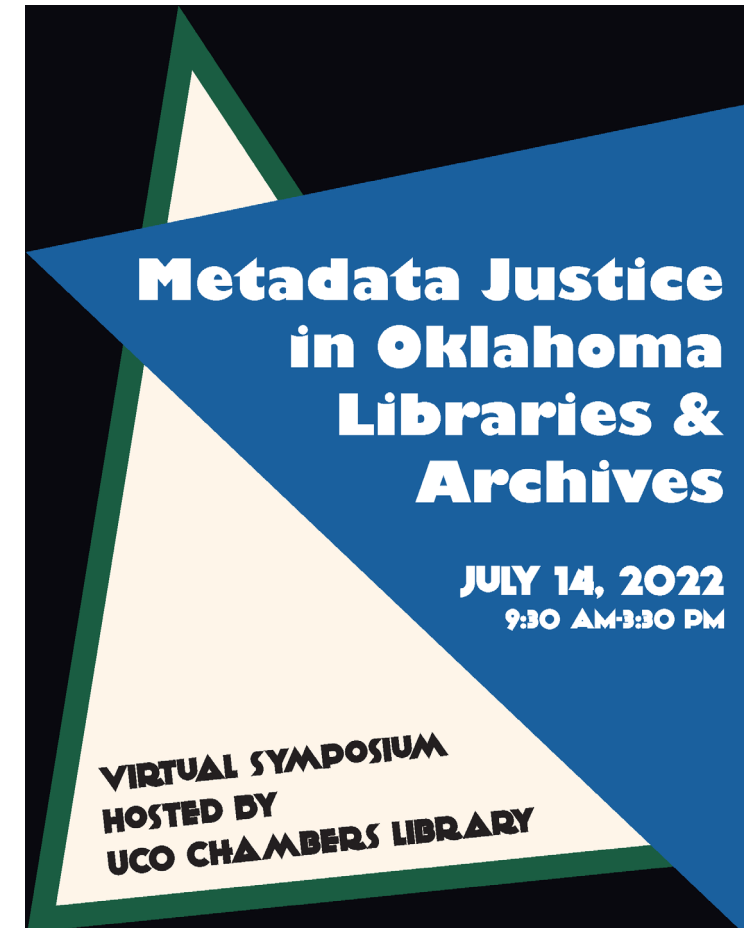
SYMPOSIUM



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METADATA JUSTICE IN OKLAHOMA LIBRARIES & ARCHIVES SYMPOSIUM

- 1. Bring people together in areas whose cultural and political climates challenge this work**
- 2. Allow people to report on projects they're doing**
- 3. Provide information on relevant processes, e.g., the process of submitting a proposal through SACO**



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SYMPOSIUM RESOURCES

Free! Virtual! Anyone is welcome!

Symposium Homepage

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

Conference Proceedings and Slides

<https://shareok.org/handle/11244/336455>

Our next symposium will be July 20, 2023!



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CONSIDERATIONS FOR SUCCESS



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CONSIDERATIONS FOR SUCCESS

What kind of structure works with your organization?

For us, formalized but flexible worked best

Which qualities are important to impart to create the department/team culture you want?

For us, adaptability, empathy, strategy, and collaboration



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MORE CONSIDERATIONS FOR SUCCESS

Do you have the staffing, i.e. can your team adequately carry out the tasks you want to do?

It's ok to start small!

What training opportunities are needed and available? What are obstacles?

Dept reviewed LCSH training modules; required significant time commitment



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WHAT'S NEXT



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SUPPORTING CHANGE

- **Seeking out others in the organization who are like-minded**
- **Practice kindness and compassion**
- **Fear is real**
- **Stay humble**



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**
- **Take advantage of new(ish) systems**
 - **Example: We're migrating to Primo VE and have opportunities to implement changes through display normalization rules**





THANK YOU!