CULTIVATING A CULTURE FOR INCLUSIVE METADATA

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May 12, 2023
ELUNA Annual Meeting, Los Angeles, CA
• 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
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
Inclusive Metadata Initiative
https://library.uco.edu/inclusivemetadata

- Inclusive Metadata Statement
- Report Offensive/Outdated Terminology Form
- Inclusive Metadata Strategies
- Symposium
INCLUSIVE METADATA STATEMENT
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
ACKNOWLEDGMENT

Who is acknowledging the 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.

What is the problem?

Where is this problem?
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.
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

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.

UCD CHAMBERS LIBRARY
Inclusive Metadata Statement as published on our library website in 2021

Current version
https://library.uco.edu/inclusivemetadata/
Report Offensive/Outdated Terminology form as created in 2021

Current version

https://library.uco.edu/inclusivemetadata/report
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
• 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
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)

<table>
<thead>
<tr>
<th>Actions</th>
<th>Status</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<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>
</tr>
<tr>
<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>
</tr>
<tr>
<td></td>
<td>• Feature implemented (January 2023)</td>
<td>• Upload text file of terms to exclude to our discovery later (Primo Back Office)</td>
</tr>
<tr>
<td></td>
<td>• On-going review of effectiveness (January 2023-present)</td>
<td></td>
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</tbody>
</table>
DEI - LIST OF TERMS TO EXCLUDE FEATURE: AS SHOWN WITH "SEXUAL MINORITIES"

Screenshot of search in Primo

Screenshot of first result bibliographic details
“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
**Problem:** "Illegal Aliens" (Library of Congress Subject Headings)

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<tr>
<td>Replaced with “Noncitizens” in metadata sourced from WorldCat as part of greater library community initiative</td>
<td>Retroactive removal completed (2020)</td>
<td>Alma normalization rule (originally) before LC changed to Noncitizens</td>
</tr>
<tr>
<td></td>
<td>On-going removal for new materials (2020-present)</td>
<td></td>
</tr>
</tbody>
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## OUTDATED/OFFENSIVE TERMINOLOGY: “INDIANS OF NORTH AMERICA”

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

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<tr>
<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>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>
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## Classification: .N Cutter

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

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</thead>
<tbody>
<tr>
<td>Replace &quot;N&quot; with &quot;B&quot; in call numbers for materials by, about, or relating to Black people.</td>
<td>Library of Congress issued change (07/2021)</td>
<td>Created text file of call numbers being changed and input into Alma Analytics to generate list</td>
</tr>
<tr>
<td>Identified 367 affected titles and placed on review by Librarians (27 titles determined no longer needed for the collection)</td>
<td>Project underway (09/2021-Present)</td>
<td>Student employee and/or staff project for updating call numbers</td>
</tr>
<tr>
<td>Updating call numbers for 340 affected titles</td>
<td></td>
<td></td>
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</tbody>
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### Analytics Report
**Folder:** /shared/Community/Reports/Institutions/UCO
**Report name:** N Cutter Search - UCO
Inclusive Language: Utilizing Homosaurus

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

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<td>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.</td>
<td>Homosaurus identified as an option (2016)</td>
<td>Training copy-catalogers to identify opportunities for Homosaurus terms and appropriate MARC encoding</td>
</tr>
<tr>
<td>Install OCLC Connexion Homosaurus Macro to aid copy-catalogers with assigning Homosaurus terms</td>
<td>Adding terms ongoing (2016-Present)</td>
<td></td>
</tr>
</tbody>
</table>

Alma Idea Exchange—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

Alma Normalization Rules
UCO – Inclusive Metadata Updates
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
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!
CONSIDERATIONS FOR SUCCESS
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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
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
WHAT'S NEXT
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!