Accessible and Inclusive
A NEW OPEN-ACCESS HANDBOOK ON DEI METADATA

NLA C&U TSRT Spring Meeting, May 22, 2024

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Coming soon ...

DEI Metadata Handbook: A Guide to Diverse, Equitable, and Inclusive Description

by Harriet E. Wintermute, Heather M. Campbell, Christopher S. Dieckman, Nausicaa L. Rose, and Hema Thulsidhos

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What is DEI metadata?

→ *Metadata informed by diversity, equity, and inclusion*

- Promotes respect for all people who interact with or are described by metadata
- Also known as:
  - conscious editing
  - critical cataloging
  - descriptive equity
  - equitable metadata
  - inclusive description
  - reparative resource description
Goals of the handbook

➔ Support goals of DEI metadata work:
  ◆ enhancing diverse representation
  ◆ improving discovery
  ◆ mitigating negative effects

➔ Offer a one-stop shop for intended audiences:
  ◆ library metadata creators
  ◆ other information professionals

➔ Facilitate outcomes:
  ◆ gain awareness of DEI issues in metadata creation and management
  ◆ learn techniques for reviewing and updating existing metadata
  ◆ develop strategies to create DEI-informed metadata
Book contents

➔ Inclusive description
➔ Name authority considerations
➔ Persons and groups
➔ Classification
➔ Subject headings
➔ Accessibility
Inclusive description

Issues in free-text elements or uncontrolled fields

Flexibility and freedom = \textit{responsibility}

- References to human identity
- Personal names

<table>
<thead>
<tr>
<th>Non-MARC</th>
<th>MARC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>245 Title Statement</td>
</tr>
<tr>
<td>Description Abstract</td>
<td>520 Summary, etc.</td>
</tr>
<tr>
<td>Summary</td>
<td></td>
</tr>
<tr>
<td>Scope and content</td>
<td></td>
</tr>
<tr>
<td>Administrative/biographical history</td>
<td>545 Biographical or Historical Data</td>
</tr>
<tr>
<td>Note</td>
<td>5XX Note Fields</td>
</tr>
<tr>
<td>Alt text</td>
<td>NA</td>
</tr>
</tbody>
</table>
Inclusive description

Recommendations for referring to identity

Ability

→ Person-first language generally is considered respectful
  ◆ *an individual with a disability*

→ Some individuals and communities prefer identity-first language
  ◆ *a hard of hearing person*

→ Avoid condescending terms—"handicapped," "impaired," "challenged"

→ Consult the ADA National Network’s Guidelines for Writing about People with Disabilities
**Inclusive description**

**Recommendations for references to names**

- Follow content standards
- Offer supporting information
- Use preferred names if possible
- Give alternative names if warranted
- Provide historical context

---

Table:

<table>
<thead>
<tr>
<th>Title</th>
<th>Iowa--the approach of a tornado--a family seeking refuge in a &quot;cyclone shelter&quot; (Frank Leslie's illustrated newspaper)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Pages from Frank Leslie's Illustrated Newspaper, July 4, 1885, Vol. LX, No. 1,554. The front page depicts a family sheltering from a tornado in Iowa. Miriam Leslie, widow of Frank Leslie, managed the New York publication after his death in 1880.</td>
</tr>
<tr>
<td>Publisher</td>
<td>Leslie, Frank, Mrs., 1836-1914</td>
</tr>
</tbody>
</table>
Inclusive description

Strategies for problematic metadata or content

→ Redaction
→ Annotation
→ Harmful language statements
→ Genre/form terms

100 1# $a Name, Right.
245 10 $a Sample book.
500 ## $a The name appearing on the title page has been omitted for privacy reasons.

Rare Books and Manuscripts Section Controlled Vocabulary for Rare Materials Cataloging (RBMS CVRMC)

Prejudicial works
- Colonialist works
- Misogynistic works
- Transphobic works
- White supremacist works

Title
Sculpture of an enslaved person

Disclaimer
Digital collections materials contain stereotypes. Their presence should be viewed and considered within their historical context. They do not represent the views of Iowa State University or the Library, which strives to create and maintain a welcoming and inclusive environment.
**Name authority considerations**

**General considerations**

➔ Could the information in this record harm the person it describes?

➔ Guiding Principles for Diversity, Equity, and Inclusion for Metadata Creation

➔ Cataloguing Code of Ethics
Name authority considerations

Privacy: birth dates

➔ Birth dates for living persons can:
  ◆ be used for identity theft
  ◆ have professional consequences
  ◆ cause discomfort

➔ Don’t include birthdates for living persons
Name authority considerations

Privacy: pseudonymous and anonymous creators

➔ Reasons creators may obscure their identity:
  ◆ professional
  ◆ personal
  ◆ safety

➔ Contact creators before adding information to an NAR that might infringe on their privacy
Name authority considerations

Gender
Name authority considerations

Gender: Transgender people’s names

The Trans Metadata Collective recommends:

◆ making a creator’s full body of work available under their current name
◆ avoiding or minimizing use of prior names they published under to preserve privacy
◆ never include former names a creator hasn’t published under
Name authority considerations

Gender: Married women’s names

100 1# $a Goodwin, Frederic S., $c Mrs. 😞

100 1# $a Goodwin, Minnie Newington 😃
400 1# $a Goodwin, Frederic S., $c Mrs. 😊
Name authority considerations

Non-English names: Romanization

➔ Use a person’s transcription of their own name when available.
➔ Consult with someone knowledgeable in the language and culture you are working with.
➔ Familiarize yourself with the linguistic and cultural issues that could lead to a less than ideal translation
➔ When using ALA–LC Romanization Tables for primary Romanization, alternatives can appear
Name authority considerations

Non-English names: Romanization

➔ When using ALA-LC Romanization Tables for primary Romanization, alternatives can be included in the 400 field

100 1# $a Dubarova, Petïa 😞
400 1# $a Dubarova, Petya Stoykova 😊
Persons & groups: the problem

It is difficult to discover diversity in our collections. Without attributes included for creators, contributors, audiences, and additional people or groups, extra work is imposed on library searchers. Users need to:

➔ Know names or titles for searching
➔ Do additional research
➔ Look for clues in display
➔ Ask for help

Possible **attributes** include:
- Age
- Education level
- Ethnic/Cultural
- Language
- Medical, psychological, and disability
- National/Regional
- Occupation
- Religion
- Social

Related concept:

*Archival silence*
Persons & groups: tools

Good news! You have new(ish) options both for metadata elements and for controlled vocabularies.

➔ Types of metadata records
  ◆ Bibliographic
  ◆ Name authority
  ◆ Digital object

➔ Controlled vocabularies (a selection)
  ◆ Library of Congress Demographic Group Terms (LCDGT) https://id.loc.gov/authorities/demographicTerms.html
  ◆ Homosaurus https://homosaurus.org/
  ◆ American Folklore Society Ethnographic Thesaurus https://id.loc.gov/vocabulary/ethnographicTerms.html
Persons & groups: example

For MARC bibliographic records, you can include characteristics of audience (field 385) and characteristics of creators/contributors (field 386).

100 #1 $a Pincus, Meeg, $e author.
245 10 $a So much more to Helen! : $b the passions and pursuits of Helen Keller / $c written by Meeg Pincus ; illustrated by Caroline Bonne-Müller.
385 ## $n age $a Children $2 lcdgt

100 1# $a Anderson, T. J. $q (Thomas Jefferson), $d 1928- $e composer.
386 ## $n eth $a African Americans $2 lcdgt
Classification

→ “The placing of subjects into categories; in organization of information, classification is the process of determining where an information resource fits into a given hierarchy and often then assigning the notation associated with the appropriate level of the hierarchy to the information resource and to its metadata.”

Subject headings

→ “List[s] or database[s] in which all terms or phrases representing a concept are brought together.”
### Common biases: Uneven coverage

- Inadequate attention devoted to topics related to certain groups

### Religion in DDC

<table>
<thead>
<tr>
<th>200s</th>
<th>Religion</th>
</tr>
</thead>
<tbody>
<tr>
<td>210s</td>
<td>Philosophy &amp; theory of religion</td>
</tr>
<tr>
<td>220s</td>
<td>Bible</td>
</tr>
<tr>
<td>230s</td>
<td>Christianity &amp; Christian theology</td>
</tr>
<tr>
<td>240</td>
<td>Christian moral &amp; devotional theology</td>
</tr>
<tr>
<td>250</td>
<td>Christian orders &amp; local church</td>
</tr>
<tr>
<td>260</td>
<td>Social &amp; ecclesiastical theology</td>
</tr>
<tr>
<td>270</td>
<td>History of Christianity &amp; Christian church</td>
</tr>
<tr>
<td>280</td>
<td>Christian denominations &amp; sects</td>
</tr>
<tr>
<td>290</td>
<td>Other religions</td>
</tr>
</tbody>
</table>
Common bias: Inaccurate subject description

- Does not represent perspective of groups described
  - E.g., LCSH use of “Fox Indians” Instead of Meskwaki”
- Inclusion of outdated and/or offensive terminology
  - E.g., past inclusion of “Illegal Aliens” in LCSH
Working within existing systems

- Keep up with current changes
- Recommend updates to existing systems
- Perform retroactive conversion
- Suggestions:
  - N-Cutter updates (LCC)
  - Dewey Contributors Google Group
    https://sites.google.com/view/deweycontributors
  - “Illegal aliens” updates at various libraries
Accessibility

→ **Accessibility** refers to providing flexibility (i.e., multiple modalities) to enable users, including those with disabilities, to readily access a resource.
Accessibility Metadata

→ **Accessibility metadata** refers to the information that provides details about the accessibility of resources, digital and physical.
Risks of not providing accessibility metadata

Lack of accessibility metadata -

1. **Limited discoverability of resources** – creating a barrier to access the relevant resources

2. **Legal non-compliance of web accessibility**
Strategies For Addressing Accessibility Issues

1. Limited discoverability of resources

→ Include accessibility metadata into MARC records.
   - MARC 341 – Accessibility Content
   - MARC 532 – Accessibility Note
   - MARC 041 – Language Code
Strategies For Addressing Accessibility Issues

2. Legal non-compliance of web accessibility

➔ Adhere to Web Content Accessibility Guidelines (WCAG) to comply with the Americans with Disabilities Act (ADA).
Best Practices in Web Accessibility for Digital Resources

➔ Alt text for images
➔ Extended description for images
➔ Audio description for audiovisual content
➔ Captions and subtitles for audiovisual content
➔ Transcripts for audiovisual content
➔ Optical Character Recognition (OCR) for digitized text
➔ Language information for digital resources
Take action

Some ways you may identify candidates for DEI metadata work:

➔ Authors
➔ Colleagues
➔ Items (in hand, online, workflow)
➔ Lectures, interviews, social media
➔ Book reviews
➔ Vendor & publisher information
➔ Collection review
  ◆ Specific subject heading(s)
  ◆ Classification range(s)
➔ Student research projects
Ethics and care

Important reminders:

➔ Be mindful of your own bias
➔ Ask yourself these questions:
  ◆ Is it useful information?
    • Public identity
  ◆ Would it violate person/group’s privacy?
➔ Verify, verify, verify!
  ◆ Accurate
  ◆ Not stolen (doxing)
➔ Track requests to remove or decisions not to record
Why we wrote the handbook

“In recent years, there has been a growing body of resources with valuable advice from innovative and forward-thinking metadata creators, but these are scattered, not always easy to find, and require time to review and synthesize.”

“My vision was to produce a one-stop, readable reference, and make it freely available through open access.”

—Harriet Wintermute, DEI Metadata Handbook, Afterword
Why open access

“The Iowa State University Digital Press, a unit of the Iowa State University Library, is an open access publisher. In support of Iowa State University's land-grant mission to spread knowledge beyond campus walls, the Digital Press aims to:

- Facilitate broad dissemination of knowledge through open access publishing and promotion;
- Provide increased opportunities for Iowa State University faculty, students, and staff to share their research;
- Publish quality scholarship in alignment with the university's curricular and research strengths; and
- Diversify the ideas, cultures, and experiences represented in the scholarly record.”

—Iowa State University Digital Press

https://www.iastatedigitalpress.com
Research and writing

Proposal

Idea for the handbook pitched by Harriet Wintermute to fellow librarians. Co-authors create a book outline.

February 2023

Planning

Co-authors create a chapter template. Individuals select chapters and create chapter outlines.

March 2023

Writing

Individuals research and write their chapters. Co-authors consult each other with questions and suggestions.

November 2023

First draft review

New Metadata Services librarian reads through the entire manuscript and provides feedback.
Peer review and copyediting

Open peer review

Co-authors select potential reviewers. Publisher contacts reviewers and manages process.

Copyediting

Freelance editor selected through editorsofcolor.com copyedits manuscript. Co-authors’ libraries split the payment, which is a flat rate based on the-efa.org/rates.

Peer review response

Co-authors edit manuscript in response to peer reviews.

January 2024

April 2024

May 2024
Publication

- Anticipated publication in **summer 2024**
- Where to find it:
  - DOI (to be minted)
  - ISU Digital Press catalog: 
    [https://www.iastatedigitalpress.com/plugins/books](https://www.iastatedigitalpress.com/plugins/books)
  - OCLC WorldCat
  - OCLC WorldShare Collection Manager:
    - **Iowa State University Digital Press** collection
Thank you!

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