

Increasing the Discoverability of LGBTQ+ Materials

A Case Study of the Homosaurus and Vendor Automation

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Following decades of critiques of subject heading terminology, recent years have seen several experimental approaches to updating subject headings in library catalogs. Most of these projects have raised significant questions about scalability, however, as they are both time and labor-intensive. This paper presents a collaborative project between Emory Libraries and Backstage Library Works to add Homosaurus terms to the Emory Libraries catalog through an automated process. Though the experiment produced useful results, it ultimately failed to substantively alter most bibliographic descriptions. The results of this project underscore the need for caution and human oversight of automated processes, as well as more substantive support for cataloging initiatives related to diversity, equity, and inclusion.

In a small piece entitled “Writing the History of Homophobia,” founding queer theorist, Eve Kosofsky Sedgwick, describes her reaction to reading a euphemistic description of Oscar Wilde:

“Looseness of morals,” “moral obliquity,” “fatal revelations,” “offenses under the Criminal Law Amendment Act”: if you already know that Wilde’s crime was to be gay, then you’ll know from these phrases that Wilde’s crime was to be gay. If you don’t already know it, you certainly aren’t going to learn it here. What do you need to look under to learn the truth? Well, I haven’t figured that out yet.¹

What Sedgwick describes is a prevalent issue when it comes to lesbian, gay, bisexual, trans*, queer, and other gender/sexual orientation/romantic minorities (LGBTQ+)-related materials: descriptive language is often outdated, indirect, offensive, or otherwise fails to facilitate connections between users and relevant materials.² To address these issues, librarians have created multiple alternative or supplementary vocabularies. An especially prominent recent example is the Homosaurus, a linked data vocabulary that provides a diverse and in-depth descriptive lexicon of LGBTQ+ themes, issues, and concepts. How libraries can effectively integrate the Homosaurus into their catalogs, however, remains an open question.

A significant issue with integration is scale: using the Homosaurus to enhance bibliographic description has the potential to affect thousands—even millions—of records. Given this scale, employing automation to systematically enhance descriptions is appealing since it can update records quickly and efficiently. To that end, Backstage Library Works created a crosswalk for the Homosaurus based on existing Library of Congress (LC) subject headings that would improve discoverability of LGBTQ+ materials by adding new Homosaurus terms to bibliographic records through an automated process.³ In

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October 2021, Emory Libraries convened a working group comprising catalogers, subject librarians, and graduate students to assess the strengths, weaknesses, and ultimately, the efficacy of this process.

This paper presents the phases of testing and evaluation of the crosswalk, including initial catalog enhancement, feedback review with Backstage, the group's final findings, analysis of the results, and recommendations for next steps. Additionally, the paper describes both the methodology for initial testing and the analysis of the full catalog processing, with the aim of helping libraries evaluate advantages and shortcomings of using crosswalks and similar automated approaches to retrospectively improve quality of subject analysis. Ultimately, the group concluded that although automation can be useful in improving subject description of LGBTQ+ materials, additional ongoing commitment and investment in training, policy development, and user education is essential for sustained, long-term success.

Literature Review

The Homosaurus and modern efforts to update cataloging language are a response to decades of research and critiques on the representation of gender and sexuality in LC classification and subject headings.⁴ Beginning in the 1960s and 70s, librarians including Sanford Berman, Joan Marshall, Celeste West, Steve Wolf, and many others critiqued LC's language in its vocabularies for making implicit assumptions about library users.⁵ Writing in 1972, Joan Marshall observed that the language of LC metadata presumed a user who was "White, Christian (often specifically Protestant), male, and straight (heterosexual)."⁶ The effects of this presumption have been myriad, ranging from alienation to marginalization to (often inadvertent) normalization.⁷ Of particular concern for both catalogers and librarians in general is that inappropriate language inhibits accessibility.

There are at least two ways to understand "accessibility" here. First, the use of language that is outdated, offensive, or otherwise problematic can signal to users that they do not belong in that space.⁸ Critics commonly stress that the additional terms alternative vocabularies provide allow community members to better recognize themselves in the library catalog. Appropriate language matters. Catelynne Sahadath writes, for example, "It is a matter of respect that resources pertaining to the communities that libraries serve, represent, and describe should be classified in a way that is meaningful to the communities themselves."⁹ Similarly, Katelyn Angell and K. R. Roberto observe, "Critical engagement with the way in which information is organized and named is important not just to librarians but to everyone, because how people are described is how they will be perceived."¹⁰ Using language in a catalog that is appropriate to LGBTQ+ communities is, therefore, a matter of inclusivity and equity.

The second way to understand accessibility concerns discoverability. LGBTQ+ materials cataloged with Library of Congress Subject Headings (LCSH) can fail to match terminological expectations by relevant audiences. In a meta-analysis of common critiques of LGBTQ+ subject access, Samuel Edge found multiple authors observed that "outdated, inadequate, and irregular placement within classification and organization systems makes it much more difficult to find relevant information."¹¹ Discussing the shortcomings of LCSH, Heather Lember, Suzanne Lipkin, and Richard Jung Lee write, "Information

on actual queer people would more likely be found under the headings ‘Gays,’ ‘Lesbians,’ or ‘Sexual minorities,’ which is, in reality, not likely to be what the searcher for ‘Queer people’ is seeking.”¹² Additionally, multiple authors have observed the difficulty of using appropriate language in the case of LGBTQ+ materials given what Pierson calls “the prolific use of variant natural language within the LGBTQ community.”¹³ This difficulty is compounded by the often-interdisciplinary nature of LGBTQ+ studies, resulting in materials scattered across call number ranges.¹⁴ In any case, when the language of the catalog is disconnected from the language of users, there are consequences for the accessibility and, consequently, the discoverability of materials.

To address terminological shortcomings, librarians and archivists constructed less heteronormative alternative vocabularies. Matt Johnson notes, “Between 1975 and 1995, as many as thirty distinct, identifiable gay and lesbian thesauri, lists of headings, and classification schemes had been developed worldwide.”¹⁵ These alternatives (or supplements) to LC metadata have seen various forms of implementation over the past few decades. In 1997, Hope Olson and Dennis Ward detailed a project in which concepts from *A Women’s Thesaurus* were linked to Dewey Decimal Classification via both Windows and web-based interfaces.¹⁶ In so doing, Olson writes, “This project constructs a network of intersections different from those in the original DDC [Dewey Decimal Classification] so that it creates meaning differently.”¹⁷ In 2013, Diana K. Wakimoto, Debra L. Hansen, and Christine Bruce described the use of a thesaurus at LLACE (Lavender Library, Archives, and Cultural Exchange), a “queer community archives” in Sacramento developed by Dee Michel. They did so because the thesaurus was both “easy to use” and “can be expanded with additional local headings as needed.”¹⁸

Of the available alternative vocabularies, the past few years have seen the Homosaurus emerge as one of the more prominent instances. Derived from the 1997 *Queer Thesaurus: An International Thesaurus of Gay and Lesbian Index Terms*, the Homosaurus has undergone multiple revisions until reaching its current version (v3, as of this writing) in 2021.¹⁹ The Homosaurus advertises itself as a form of “information activism,” following Cait McKinney’s 2020 work. Its editors proclaim they are “Motivated by a refusal to accept that LGBTQ+ lives or resources should be marginalized, hidden, misrepresented, or otherwise difficult for queer and trans people to uncover.”²⁰ Comparing the Homosaurus’ vocabulary with that of LC metadata, Dobreski, Snow, and Moulaison-Sandy indicate in their study of “identity-related” terms that “neither of the Library of Congress (LC) vocabularies exhibited a large overlap with the Homosaurus, with LCSH able to cover about 25% of terms and LCDGT [Library of Congress Demographic Group Terms] covering roughly 28%.”²¹ This is to say that the Homosaurus offers catalogers an expanded vocabulary when it comes to describing LGBTQ+ identities.

Modern Homosaurus Projects

The Homosaurus can be understood as a resource to enhance the discoverability and accessibility of LGBTQ+ materials. It is not yet clear how libraries can best use the Homosaurus to effect this end, however. As of this writing, most projects incorporating the Homosaurus in bibliographic records operate on a relatively small scale. These projects can be divided into a few categories:

- Identifying areas of the library collection that could benefit from retrospective analysis and manually applying Homosaurus terms to select resources.
- Masking offensive terminology in the discovery layer without modifications to existing bibliographic or authority records.
- Using automation to supplement existing records with appropriate Homosaurus terms.

The work of Adrian Williams at the University of Kentucky Libraries and Rachel K. Fischer at the Cooperative Computer Services (CCS), a consortium of public libraries in the Chicago area, are examples of the first approach. Williams describes examining approximately four hundred records with the LCSH heading “Sexual minorities,” reviewing records with an item in hand and adding Homosaurus terms where appropriate.²² Williams performed their work in OCLC records, so all libraries with an OCLC cataloging subscription benefited from their efforts. CCS, meanwhile, passed a motion in May 2021 to add Homosaurus terms to member catalogs.²³ The cataloging handbook for consortium members was updated to include guidelines on how to apply Homosaurus terms, and within two months over two hundred authority records were added. During the first year of the project, Homosaurus terms were added to 2,439 bibliographic records for physical items. CCS’s project documentation addresses issues that many libraries face when implementing alternative subject vocabulary: ongoing authority control, dealing with headings that are the same in different vocabularies, and headings that might have different meanings in different contexts.²⁴ In addition, the CCS documentation outlines a workflow to update terms when the vocabulary itself changes. This is especially important with vocabularies—like the Homosaurus—that are regularly revised and updated. CCS proposes one possible solution, namely maintaining local authority records for Homosaurus terms, while CLAMS (Cape Libraries Automated Materials Sharing) utilizes another, working with an authority vendor willing to support ongoing authority maintenance of multiple controlled vocabularies.²⁵

Some libraries have taken a different approach by modifying discovery layer displays to mask subject headings that patrons could consider harmful or offensive. These modifications can be implemented with any subject vocabulary or group of terms, such as alternative vocabularies or community/librarian suggestions. Examples of such replacements from the Triangle Research Libraries Network Project include “African American sexual minorities” to “African American LGBTQ people,” and “Alaska native sexual minorities” to “Alaska Native LGBTQ people.”²⁶ The biggest advantage of this approach is that it does not require any modifications to existing bibliographic/authority records or adjustments of existing authority control workflows. The hidden terms are still searchable, so their removal from the display does not result in loss of discoverability. However, this solution might not be achievable with every LMS and requires substantial development work and extensive mapping for every term, making it feasible primarily in large academic or public library systems with in-house programming and software development expertise.²⁷

The efforts of these focused, targeted projects are significant, but they raise questions about scalability and transferability given their labor-intensive character. For that reason, some libraries have experimented with automation to apply Homosaurus terms. Juliet L. Hardesty and Allison Nolan reported on a small scale proof-of-concept project that used “skos:exactMatch relationships defined

by the Homosaurus to enable researchers to use Homosaurus terms to search a library catalog and retrieve relevant results based on the connected LCSH terms that are already in the catalog record.”²⁸ Emily O’Neal and Casey Cheney reported on another example of automation at Deschutes Public Library, which collaborated with a vendor (Backstage Library Works) to apply Homosaurus terms programmatically to bibliographic records containing relevant LCSH headings.²⁹ While these projects both present promising results, they are smaller projects. Only a subset of Homosaurus terms was used in Hardesty and Nolan testing, and the Deschutes Public Library collection size is 275,972 volumes.³⁰

It is unclear how effective automated processes are at creating new points of subject access at scale, i.e., how these sorts of approaches work when applied to a large academic library collection. Emory Libraries’ implementation of Backstage’s automated crosswalk on a database of about 4 million bibliographic records provides some answers and insights into successful collaborations with vendors on large scale subject analysis automation projects.

The Homosaurus at Emory Libraries

To assess the efficacy of Backstage’s automated Homosaurus crosswalk, Emory Libraries solicited volunteers in October 2021 for a pilot project. The call for volunteers was originally sent out to the internal cataloging listserv, however, the project coordinator later shared the call on additional lists to encourage participation from a broader range of librarians and community stakeholders. The resulting team of volunteers consisted of technical and public services librarians from six different institutional libraries, including archivists, and two PhD students from different departments. Overall, the team represented diverse professional and academic skill sets, domain knowledge, and catalog user perspectives. The goals for the project included, first and foremost, evaluating the Backstage automated enhancement process and providing recommendations based on that evaluation. Second, the project team discussed how implementing a retroactive and ongoing automated enhancement process in the Emory Libraries catalog might serve users in search and discovery. Table 1 outlines the overall project timeline, broken into phases. The results of each phase will be discussed in subsequent sections.

Phase 1: Crosswalk Assessment

Because some members of the project team were not librarians or catalogers, work began with an introduction to the Backstage process, including an explanation of the LCSH to Homosaurus terms crosswalk used to facilitate it. At the time the project commenced, Backstage had compiled a crosswalk that included 2,850 terms extracted from MARC 650 fields with a second indicator of _, 0, 2, or 4 (no information, LCSH, MESH, and “Source not specified,” respectively) in a sample set of bibliographic records. Backstage then mapped those terms to Homosaurus terms, using both locally defined mappings and the `skos:exactMatch` metadata provided by the Homosaurus. The resulting crosswalk consisted of 1,595 Homosaurus terms that essentially duplicated the existing LCSH subject heading and 1,255 Homosaurus terms that provided new subject access points. It is important to note that at the time of this project, the Homosaurus had a total of 1,795 terms in use: 485 with an equivalent in LCSH, 1,285 with no equivalent in LCSH, and 27 terms that would not be able to convert through an

Table 1. Project Timeline

Phase	Activities
Pre-Project	Create volunteer project team.
1: Crosswalk Assessment	Send sample files to Backstage for processing. Review sample files.
2: Initial Findings	Complete and deliver project recommendations to [University] community and Backstage.
3: Full Catalog Enhancement	Backstage processes entire database of bibliographic records. Reload updated records. Produce reports for review. Review of the resulting changes to the catalog.
Post-Project	Develop, implement, and maintain policies, procedures, and workflows related to the Homosaurus. Solicit community feedback and identify additional retrospective subject analysis projects. Support graduate internship(s) to perform focused retrospective subject analysis projects. Plan and provide additional education for catalogers.

automated process because they have a contextually different meaning in the Homosaurus than in LCSH.

With the Backstage crosswalk outlined, a report was run on the Emory Libraries catalog using Alma Analytics to extract MARC records for materials of different types (e.g., print, electronic, video recordings, serials) within a select number of Library of Congress Classification (LCC) call number ranges. Originally, Backstage requested records from HQ12-HQ449 (Sexual life), but input from project team members resulted in the addition of content from BF692-BF692.5 (Psychology of sex. Sexual behavior) as well as ranges within PQ (French literature), PR (English literature), and PS (American literature) specifically related to gender identity. A total of 7,804 records were sent to Backstage, which were then processed using automated enhancement. Homosaurus terms were added in a 650 field using second indicator 7 with \$2 homoit and a \$0 with the corresponding Homosaurus URI. In total, 17,900 Homosaurus terms were added to the records sent to Backstage.

To begin the evaluation process, a selection of 200 of the returned MARC records were processed through MarcEdit to extract the following fields and export them as a .CSV file:

- 001 – Unique identifier for the bibliographic record
- 050 – Classification/Call Number, if available
- 245 – Title and statement of responsibility
- 6XX _0 – LCSH headings
- 6XX _7 \$2 homoit – Homosaurus terms

The resulting spreadsheet was supplemented with the full LC classification hierarchy associated with the call number to provide additional context for team members who were not familiar with LCC. Each team member was then assigned twenty to thirty records to evaluate using the following instructions:

1. Assess if the bibliographic record was successfully enhanced for discoverability.
 - a. Were new terms provided?
 - b. Was the meaning of the added terms appropriate contextually?
2. Search the Homosaurus for any additional terms which could improve the discoverability and accuracy of description.
3. Note if the enhancement was unsuccessful due to insufficient original subject analysis.
4. Add additional comments for clarification or discussion.

For the evaluation process, team members were encouraged to use the information provided in the spreadsheet, but also to use a local, unique record identifier to locate the complete bibliographic record if necessary to gain a fuller understanding of the item being described. Several team members took this a step further and retrieved the physical items to assess the LCSH and Homosaurus terms against the item in hand.

Phase 2: Initial Findings

Following the evaluation period, the project team reconvened to discuss the results. Two issues immediately became apparent. First, and as anticipated, many of the added Homosaurus terms were essentially duplicating the existing LCSH terms, and therefore did not add any value as subject access points. For example, the LCSH term “Bisexuality” is an exact match to the Homosaurus term “Bisexuality” not only conceptually, but also in terms of spelling and capitalization. Thus, when applied automatically using the Backstage crosswalk, this Homosaurus term does not create a new point of subject access. Other terms, such as the LCSH “Bisexuals” and the Homosaurus term “Bisexual people,” that are also identified by the Homosaurus as exact matches, nevertheless provide an additional access point because they vary in spelling, capitalization, and/or word order.

Second, the effectiveness of the automated process was heavily dependent upon the original subject analysis: if existing LCSH terms were too broad or inaccurate—or completely absent—successful enhancement was not possible. For example, the bibliographic record for *The Sexual Scene* (1973) included only one compound LCSH subject heading, “Sex customs—United States,” despite the book covering topics ranging from marriage to sexual legislation, abortion to homosexuality, and pornography to sexual assault.³¹ When this record was processed, only one Homosaurus term was added: “Sexual practices.” During the review phase, a team member noted that a number of other Homosaurus terms could be relevant to describing the book’s content, including “Sexuality,” “Sexual relationships,” “Single people,” and commented that “if additional tags [subjects] were recognized, this text would show up more [in catalog searches].” This second issue was common for older records such as this one, reflecting challenges posed by data loss from card catalog to digital conversion and subsequent integrated library system migrations, but also by the presence of out-of-date and depreciated terminology.

In addition to evaluating the enhancement process, the project team discussed use cases and the ultimate utility of adding Homosaurus terms to the Emory Libraries catalog. Collectively, the team agreed that despite the limitations, implementing the automated process for retroactive addition of Homosaurus terms to the full catalog would ultimately improve the search and discovery experience for Emory University faculty and students in a wide range of research areas and fields of study. Team members noted that the addition of Homosaurus terms in any capacity improved representation of LGBTQ+ related topics in the catalog, introduced new terminology to users who might not be familiar with LGBTQ+ topics, and reflected Emory University's and Emory Libraries' commitments to diversity, equity, and inclusion.³²

The project team prepared two sets of recommendations: one for library administration in support of implementing a focused program for both retroactive and ongoing addition of Homosaurus terms to the Emory Libraries catalog, and one for Backstage for improvements and adjustments to the automated process. The recommendations made to Emory Libraries leadership included:

- ongoing automated enhancement of bibliographic records with Homosaurus terms for the entire Emory Libraries catalog
- continuing to discuss how to effectively assess and update bibliographic records with metadata insufficient for automated enhancement with Backstage
- providing support (training, policies, procedures, etc.) for cataloging staff to apply Homosaurus terms as part of normal workflows
- conducting outreach with relevant stakeholders and subject area experts to both raise awareness of catalog biases and limitations, as well as how Emory Libraries are responding to those issues

The recommendations made to Backstage regarding crosswalk refinements identified additional LCSH and Homosaurus terms for inclusion. For example, certain LCSH terms that are full phrases can be mapped to multiple Homosaurus terms (e.g., “Sex instruction for gay men” could signal for the inclusion of the Homosaurus terms “Sex education” and “Gay men,” rather than just “Sex education”). Additionally, some terms would benefit from the application of broader Homosaurus terms. For example, the LCSH term “Homosexuality” could prompt the addition of the Homosaurus term “Sexuality,” which does not have an LCSH equivalent. Finally, the team recommended adding Homosaurus terms based on the contents of certain 6XX subfields (\$x, \$v). For example, the LCSH complex subject heading “College students—Sexual behavior,” where “Sexual behavior” is coded in \$x, could prompt the inclusion of the Homosaurus term “Sexual practices.” Subfields in authorized names, such as the term “Gay liberation activist” in a \$c, could be used to prompt the application of Homosaurus terms such as “Political activists (LGBTQ).” Based on these recommendations, Backstage revised the crosswalk including a suggestion to add broader Homosaurus terms prior to the full database processing.

Phase 3: Full Catalog Enhancement

The Homosaurus project recommendations were approved in fall 2022 by library administration, and in December of that year Emory Libraries collaborated with Backstage Library Works to add Homosaurus

terms to the full catalog. Upon receiving the updated MARC files from Backstage, the review of affected bibliographic records was conducted by transforming the bibliographic data from MARC to .CSV and then exploring that data in OpenRefine. Specifically, researchers analyzed and identified added Homosaurus subject and genre terms and their frequency, as well as a few descriptive fields such as date of publication and classification ranges. Contextualization through these additional aspects of the bibliographic records provided useful means of understanding how LGBTQ+ terminology was and is being represented in a traditional library catalog of a large academic library to better address gaps and errors in that representation.

Backstage initially estimated that 15–20 percent of bibliographic records would be affected by the process. In reality, only 204,548 of the approximately 4,000,000 bibliographic records (roughly 5 percent) were updated. Of the affected records, 49.1 percent had a single Homosaurus term applied in either a 650 or 655 field (table 2). A total of 559,336 Homosaurus terms were added, 79.1 percent of which have an exact LCSH match as indicated in their Homosaurus authority record (table 3), meaning that many added terms did not provide any new subject access points.

The top ten most frequently applied Homosaurus terms included several broad and not strictly LGBTQ+ specific terms, including “Law,” “Legal status,” “Family members,” “Children,” “Human rights,” and “Feminism.” Three more of the top ten terms, “Women,” “Men,” and “Gender identity,” were often applied in cases where a specifically LGBTQ+ sense of the terms was not relevant. “Sexual minorities” was the tenth most frequently applied term, and the only one of the top ten terms to be arguably specific to LGBTQ+ topics. It is worth noting

Table 2. Homosaurus Terms Applied per Record

Terms Applied per Record	Number of Records	Percentage of Records
0	248	0.12%
1	100,418	49.10%
2	64,732	31.65%
3	19,090	9.33%
4	7,058	3.45%
5	4,298	2.10%
6–10	7,649	3.74%
11–15	866	0.42%
16–20	137	0.07%
21–29	51	0.02%

Table 3. Homosaurus Terms Added to Bibliographic Records

Total Additions	559,336
With an exact LC Match	442,660
Without an exact LC Match	116,676
Total Unique Additions	656
With an exact LC Match	364
Without an exact LC Match	292

Table 4. Frequency of Homosaurus Headings

Homosaurus Term	Records	LC Exact Match
Gender identity	53,422	Yes
Women	49,658	Yes
Law	40,170	Yes
Legal status	31,284	Yes
Family members	27,798	No
Children	17,316	Yes
Human rights	14,903	Yes
Feminism	12,562	Yes
Men	9,831	Yes
Sexual minorities	9,366	Yes

Note: These are the top ten most frequently applied terms, constituting 47.6% of all terms applied.

Table 5. Library of Congress Classifications of Updated Records

Class	Topical Hierarchy	Records
HQ	Social Sciences--The family. Marriage. Women	27,768
P*	Language and Literature	17,053
K*w	Law	15,254
H*	Social Sciences	15,135
KF	Law--United States	14,355
R	Medicine	11,056
B	Philosophy, Psychology, Religion	9,550
K	Law--Law in general. Comparative and uniform law. Jurisprudence.	9,249
PS	Language and Literature--American literature	8,815
J	Political Science	4,889
D	World History	4,251
Z	Bibliography, Library Science, Information Resources	3,716
G	Geography, Anthropology, Recreation	3,043
E	History of the Americas	2,774
L	Education	2,287
F	History of the Americas	2,024
Other (A,C,M, N,Q,S,T,U,V)	General Works; Auxiliary Sciences of History; Music and Books on Music; Fine Arts; Science; Agriculture; Technology; Military Science; Naval Science	5,988

*The number of records in these classes is the remainder without the count from subclasses HQ, K, KF, and PS.

that nine of the top ten most frequently applied terms have an exact LCSH match, including “Sexual minorities,” and their addition had a high potential for duplicating existing subject coverage.

For updated records that included a valid LC Classification number in the 050 and/or 090 field, 27.3 percent fell into the H Class (Social Sciences), with 17.7 percent of all records falling specifically within the HQ Subclass (Social Sciences—The family. Marriage. Women). Additionally, 24.7 percent of records fell into the K Class (Law), and 16.5 percent in the P Class (Language and Literature). These results are expected, as it is common for LGBTQ+ topics to appear as the predominant subject or related subject for materials classified in these areas. This is reflected in the selection of HQ as the primary subclass chosen for the initial crosswalk evaluation process.

Overwhelmingly, the records updated reflected modern works, with 50.8 percent published in the twenty-first century and 40.3 percent published in the twentieth century. By decade, 24.8 percent were published in the 2010s, 21.2 percent in the 2000s, and 15.6 percent in the 1990s. Additionally, 4.6 percent of records updated were for works published between 2020 and 2022. There are several possible reasons for predominantly recent works being impacted by the automated process, such as the tendency for newer bibliographic records to include a more robust LCSH subject analysis and the increase of publications on overtly LGBTQ+ topics over time. Antiquated or outdated subject headings

in older records are another possible reason why the enhancement process had less of an impact on works published pre-1990.

While this data does not, nor is it meant to, constitute a detailed evaluation of LGBTQ+ holdings in the Emory Libraries collection, it does help define the reach of the LCSH–Homosaurus crosswalk and underscore patterns in how the crosswalk

was applied when implemented for a large academic library bibliographic database. In this way, this data could inform decisions about future projects focused on the retrospective addition of subject terms. For example, a closer assessment of holdings in the HQ range may reveal sections of material, specifically those published pre-1990s, which would likely benefit from subject enhancement on a case-by-case basis.

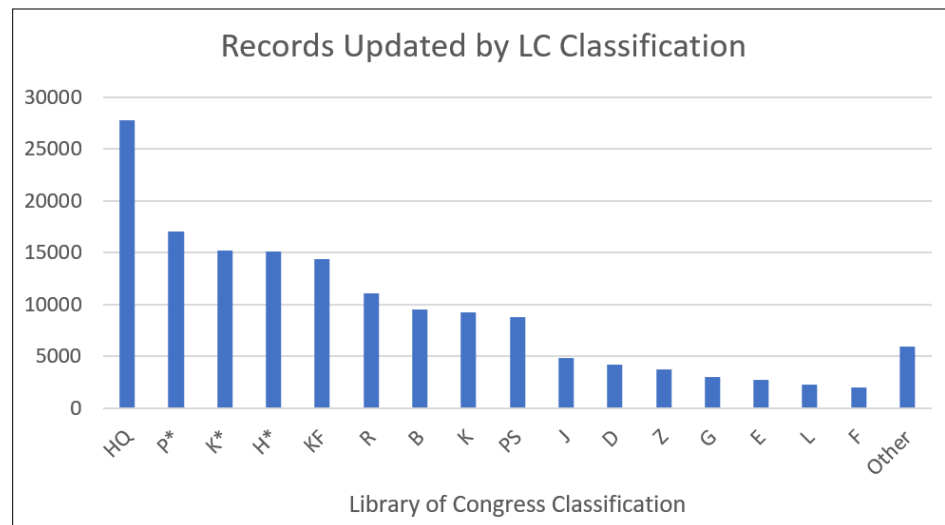


Figure 1. Records Updated by LC Classification

Project Results and Insights

There are several advantages to using automation to add subject headings to bibliographic records. First, it allows the addition of supplemental terms to a large database of bibliographic records relatively quickly and without manual intervention. Second, automated processes modify records not created in-house, for example, vendor records for electronic resources and shelf-ready materials. Third, it can add terms to records in parts of the collection that might otherwise not be considered by catalogers as relevant. Finally, automated processes can help identify areas of the collection that would not have been considered for additional subject analysis.

However, the results of this project show that adding Homosaurus terms via automation to supplement existing LCSH subject coverage has issues as well. First, automation cannot effectively add new access points if the existing metadata is insufficient to generate relevant new headings. Second, where terms can be mapped automatically, these additional subject access points can be overly broad or duplicate existing subject coverage and introduce unnecessary clutter into a catalog. Third, even in cases where automation is successful, i.e., adds new, precise, and relevant subject access points, manual review remains crucial due to limitations of the automated process itself.

Quality of Subject Analysis

A critical aspect of Phase 2 included in-depth discussions amongst the review team about the challenges of assigning subject terms for complex and nuanced concepts. Several team members, primarily non-librarian subject matter experts, noted not only the lack of relevant or precise terms in the original bibliographic records, but also in both LCSH and Homosaurus vocabularies themselves. For example:

- “A category like ‘sex magazine’ or print culture would be helpful here, since the book compiles letters send [sic] to a British publication.”
- “Why was sexology not picked up? The book covers sexual variance across India, China, and what we would now call the Middle East—no way to highlight ‘Sexual variance’ or ‘cultural variance’ in homosaurus.”
- “‘Sexual Politics’ would be a helpful heading (Homosaurus only has politics around groups and activists).”

The lack of LC headings in the Emory Libraries records were often noted during the initial review. The quality of the original subject analysis is critical for the success of any potential automated application of mapped subject headings. Unfortunately, this is also often one of the biggest issues with using automation alone. If a catalog has a significant number of bibliographic records without subject headings, with very limited or extremely broad subject headings, and/or older forms of LCSH subjects that have not been properly updated or maintained, these records will not benefit from an automated process.

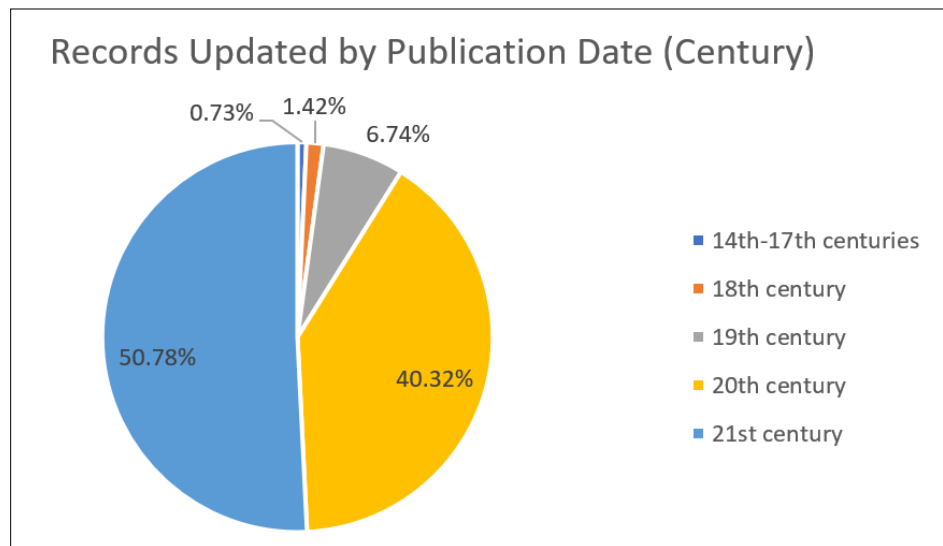


Figure 2. Records Updated by Publication Date (Century)

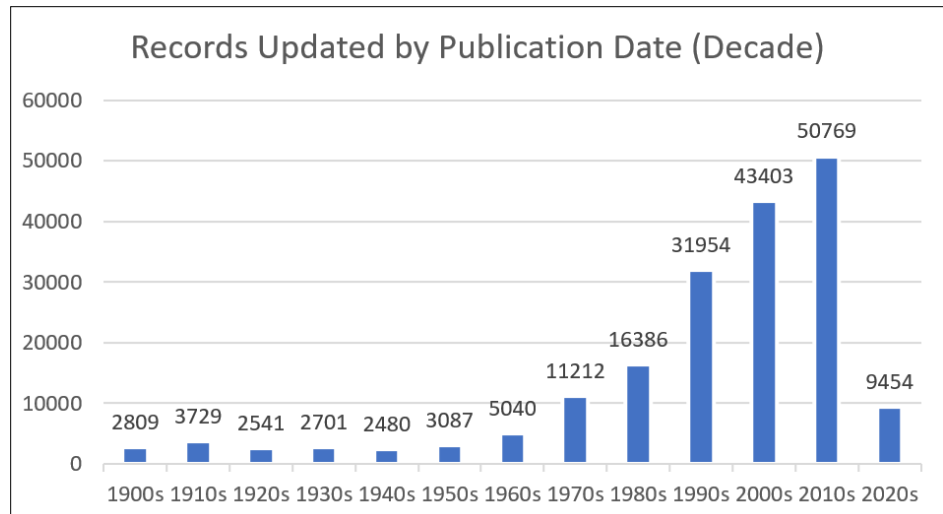


Figure 3. Records Updated by Publication Date (Decade)

The challenges inherent to attempting to map ambiguous terms in LCSH to a specialized vocabulary like the Homosaurus were also apparent. For example, two reviewers independently observed:

- “In general [I was] not sure when ‘Sex work’ is appropriate vs. ‘Prostitution.’”
- “It is hard to know when to use prostitution and when to use sex work.”

Upon further discussion, team members agreed that it would be best for these terms to be applied manually, when possible, as both “Prostitution” and “Sex work” have very specific connotations and contextual uses that cannot easily be connected via an automated direct relationship. Similarly, the scope of the LCSH term “Sex” made it nearly impossible to accurately map to one or more Homosaurus terms automatically. Members observed:

- “The subject ‘Sex’ is also super vague and can easily be divided into several Homosaurus terms depending on the actual meaning, i.e., Sex (Body), Sex (Act), Sexuality.”
- “It’s very important that the term ‘Sexuality’ be integrated into more records that are actually talking about ‘Sexuality’ rather than ‘Sex.’”

The ambiguous and misleading use of the LCSH term “Sex” within bibliographic records produces a large number of irrelevant results. Currently, the LC authority record for “Sex” indicates that it should be used for the concepts of “Gender (Sex),” “Human beings—Sexual behavior,” “Human sexuality,” “Sex (Gender),” “Sexual behavior,” “Sexual practices,” and “Sexuality.”³³ However, as the above team members noted, the conflation of these distinct meanings and concepts does little to accurately describe a work’s content. In fact, the current structuring of “Sex” in LCSH reinforces the equivocation of gender, sexuality, sexual behavior, and physical anatomy as synonymous aspects of the human experience. Further, because LCSH conflates these concepts, it is impossible to create mappings between more specific, relevant terms provided by the Homosaurus, such as the aforementioned “Sex (Body),” “Sex (Act),” and “Sexuality” without a manual assessment of the item being described.

This example is paradigmatic: in many cases there is no straightforward way to infer from existing LC headings what Homosaurus terms would be appropriate. This is, in some ways, unsurprising, in part because the Homosaurus was created to address gaps in LCSH’s coverage of LGBTQ+ topics and in part because of the inherent ambiguity of many LCSH terms. This observation is consistent with the limitations researchers have noted with fully automated methods in other areas related to subject analysis and cataloging, such as topic modeling, text mining, and topic extraction.³⁴

Newness, Precision, and Relevance of Added Subjects

As mentioned previously, the team provided a range of feedback and requests for additions and refinement of the initial crosswalk devised by Backstage, including applying some broader terms identified by the Homosaurus. After processing the full catalog with the newly refined crosswalk in Phase 3, it became clear that in many cases the inclusion of exact string matches and some of the broader terms did not necessarily improve subject coverage in the bibliographic records; rather, it produced a state of clutter and confusion.

At the time of our evaluation, approximately 27 percent of Homosaurus terms had equivalent LC subject headings as identified by the Homosaurus itself, consistent with the vocabulary's intent of being a supplemental vocabulary rather than a comprehensive replacement. Of the 656 unique Homosaurus terms added to the Emory Libraries catalog (table 3), 55 percent had an exact LCSH match and 36 percent were exact string matches, meaning that when applied automatically to a bibliographic record, they offered no new access points. Additionally, as evidenced from the ten most frequently applied Homosaurus terms (table 4), many broader terms had the potential to mislead a user regarding an item's content. For example, the most commonly added Homosaurus term was "Gender identity" which was applied according to the crosswalk as a broader term for all gender identities, including every instance of the LCSH terms "Men" and "Women." This becomes an issue when, for example, the bibliographic record for a biography of a female author from the nineteenth century includes the LCSH compound subject "Women—19th century—Biographies." Based on the crosswalk, this subject heading would prompt the addition of the Homosaurus terms "Women" and "Gender identity;" however, without confirming that there is a significant portion of the biography dedicated to the author's exploration or understanding of her gender identity, it would be difficult to assert that "Gender identity" is a relevant heading.

Terms without such external matches cannot easily be added through automated enhancement. Careful attention to context, meaning, and usage of many of the colloquial terms that make up the bulk of the Homosaurus is critical in constructing a potential crosswalk for automation. In many cases, there is no means of successfully mapping certain Homosaurus terms to a bibliographic record that only uses LCSH subjects. One example of an indirect mapping method is to apply broader terms as they are identified in the Homosaurus; note that this approach can backfire. The broader terms are, in fact, often too broad to provide meaningful contextualization. For example, applying "Sexuality" as a broader term alongside "Homosexuality" can be useful for an individual attempting to collate materials on a variety of sexualities. However, applying the term "Monosexuality" to the same work could misrepresent the content of the item if not assessed manually. Similarly, there are Homosaurus terms that should only be applied after careful consideration of the item because of the nuanced usage by the community. For example, when reviewing the results of the full catalog enhancement, team members expressed concerns over the automatic application of the term "Transgender people" as a broader term for "Non-binary people" given that non-binary individuals do not necessarily see themselves as transgender and the relationship between non-binary and trans* is a complicated (and often idiosyncratic) one.

Project Recommendations

Given the mixed outcome of the review and initial processing, we do not recommend automated enhancement as a stand-alone solution to supplement catalog data. There are some advantages to using automation to introduce terms from alternative vocabularies, but it is not a panacea for the shortcomings of existing metadata. Planning and accountability for manual, ongoing, and retrospective work are necessary for any successful and impactful project intending to improve subject access to LGBTQ+ materials and content from other historically marginalized groups. As such, when making the

decision to attempt an automated approach to catalog supplementation, we recommend considering several factors.

The first consideration is to clarify the impact on various stakeholders, including patrons, library administration, information technology departments, acquisitions, and more. Each of these parties has a vested interest in the form and function of the catalog, whether they are aware of it or not, and should be considered when choosing an approach to supplementing subject access. Take stock of the scope of the collections in question and the specific needs of the communities being served before making unilateral decisions to add or change subject analysis. Failure to do so may result not only in wasted time and funding, but also fail to serve the specific search and discovery needs of users.

Second, consider the technical skills and infrastructure required and/or impacted by such a process. A one-time automated update will not suffice; cataloging and systems staff need to be capable of performing ongoing and retrospective maintenance on the affected records. This includes consideration of how such work will impact existing cataloging workflows, particularly for materials that are not directly handled by catalogers, such as shelf ready materials and vendor records. Additionally, staff in charge of maintaining the discovery layer must be made aware of these additions and changes so that plans for the display, indexing, and faceting of the new terms can be properly managed and deployed.

Third, ensure that library administration understands and supports ongoing commitment to maintenance and addition of supplemental terms. This guarantees that even after the new terms are applied, whether through an automated process or by catalogers directly, any updates or changes to the terms made in subsequent releases of the vocabulary will be kept up-to-date. In Emory Libraries' case, the project team recommended adding the Homosaurus as one of the vocabularies for ongoing authority maintenance and providing training to cataloging staff on the use of the Homosaurus for subject analysis, as many staff members might not be familiar with or confident in applying LGBTQ+ terminology. In October and November of 2022, Emory Libraries partnered with Adrian Williams, a member of the Homosaurus Editorial Board, to provide a two-part training. The first session introduced the Homosaurus and its history, followed by a second hands-on session covering the process of applying Homosaurus terms during cataloging.

Fourth, develop a set of policies and procedures on the use of the supplemental vocabulary to enable consistency, quality, and accountability. Policies and procedures can range in specificity from simply outlining which terms from the supplemental vocabulary are approved for use, to in-depth documentation on workflows, authority control, training, and additional guiding resources. The degree of robustness of such documentation will naturally vary depending upon the staffing, time, and financial resources available to implement and maintain a supplemental vocabulary. If implementing a supplemental vocabulary targeted at reparative subject coverage for marginalized groups or topics, consider interlinking the cataloging documentation with policies regarding the reporting and remediation of harmful language in the catalog.

Lastly, remember that this work is done in service of a community of users, and continued collaboration with a wide range of librarians, subject area experts, and users to implement these changes more

fully and effectively should be a cornerstone of any project of this kind. In this project's case, this is reflected in the recommendation for Emory Libraries to support collaboration between subject matter experts, subject librarians, and technical services to identify areas of the existing collection that would benefit from retrospective subject analysis and manual maintenance through the addition of LCSH and Homosaurus terms. To support this work, the team recommended establishing a graduate fellowship or an internship for a student with interest in relevant subject areas to help evaluate existing subject headings and provide additional subject analysis to improve discoverability of LGBTQ+ materials in the pertinent areas of the collection by applying both additional LC subject headings and Homosaurus terms. Such a fellowship not only provides a dedicated person to assess and implement manual retrospective maintenance work, but also engages an individual normally relegated to the role of "catalog end user" in a role that more directly impacts how the catalog serves users.

Conclusion

Although the work of updating subject headings is significant, it is worth noting that in and of itself updating library metadata is only one component of rethinking the library and the catalog as more inclusive spaces. The library has a history, and that history includes redressing the way(s) in which libraries have contributed to marginalizing the lives and perspectives of certain demographics.

Writing on the history of finding LGBTQ+ materials, K. L. Clarke notes, "Add in the difficulty of searching library catalogs, and the near-impossibility of browsing LGBTIQ books in a campus library (which are likely to be in several different call number areas due to the interdisciplinary nature of the field), it is easy to understand that some users might be frustrated and abandon using the library and its resources altogether."³⁵ This is to say that even as we continue to improve the discoverability of such materials, there remains the question of those who have already "abandoned" the library and the catalog. Adding more inclusive language certainly helps, but as Pierson notes,

Where a traditional barrier is perceived, the mere awareness of it can pre-empt and deter interaction. In such cases, perception acts as a *proxy* barrier. When this is so, the information seeker allows the perception to influence information-seeking behaviour, rather than directly interacting with the barrier. Therefore, perception becomes a proxy for the traditional barrier. In cases where a traditional barrier may not be present, the perception that it exists is still enough to influence behaviour. In these cases, perception can act as a *shadow* barrier.³⁶

Given the longstanding inadequacy of cataloging concerning LGBTQ+ materials, the addition of new metadata is not, in and of itself, sufficient to effect change. Increasing the discoverability of such materials is a step in the right direction, but insofar as there remains a perception that library metadata is inadequate in this area, then such changes will be minimally impactful. Accordingly, proactive outreach, engagement, and education are needed to change user perceptions and increase awareness of new metadata.

Notes

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