NOTES ON OPERATIONS
Where Do I Belong?
Creating an Inclusive Metadata Policy

Nicole Lewis, Karen Glenn, Jeremy Myntti, Sharolyn Swenson, and Katie Yeo

Inclusiveness and honoring different cultures that reflect our patrons has been discussed in many different venues in the last few years. The staff of the Brigham Young University Library recognized the need for our metadata to demonstrate the commitment we have to honor others and to create a community of belonging. The staff also recognized that a policy would provide a roadmap for how to embark on fixing legacy metadata and how to move forward in creating metadata that reflects our core values in the library and at the university. This case study details how we developed an inclusive metadata policy and its accompanying documentation. We provide examples of how the policy is being implemented and the steps we have taken to help library staff understand cultural humility and how it can be applied in their work.

Library patrons comprise a diverse group of individuals. To feel like they belong in the library, patrons must be able to discover resources that reflect themselves, including their culture, viewpoints, and values. Many librarians have been working in recent years to make sure that the metadata representing their collections is inclusive and representative of all voices. To better define the library's responsibility around inclusive metadata and how these practices could be implemented, the staff at the Brigham Young University (BYU) Library created an inclusive metadata policy to help build dynamic and inclusive collections that are discoverable and understandable for all patrons.

The present article provides a case study of how the library staff created this inclusive metadata policy and the accompanying recommendations document to guide its implementation. The policy was created to align with university and library goals for creating a "community of belonging" where all members of the campus community are valued.[1] This article will include a high-level overview of the process that library staff utilized to create this policy as well as specific information about how the policy has been and will be applied in metadata creation.

Literature Review

Inclusive metadata is metadata that strives to include, represent, and value all groups of individuals while remaining as free from bias as possible. Inclusive metadata "recognizes that no archival function is neutral, including description, but that actions can be taken to remediate and avoid bias and harmful

Nicole Lewis (nicole_lewis@byu.edu), Metadata Standards Librarian, Brigham Young University Library. **Karen Glenn** (karen_glenn@byu.edu), Archival Processing Librarian, Brigham Young University Library. **Jeremy Myntti** (jeremy_myntti@byu.edu), Associate University Librarian, Metadata and Information Technology, Brigham Young University Library. **Sharolyn Swenson** (sharolyn_swenson@byu.edu), Continuing Resources Catalog Librarian, Brigham Young University Library. **Katie Yeo** (katie_yeo@byu.edu), 19th and 20th Century Americana Catalog Librarian, Brigham Young University Library.

language."[2] This inclusivity not only extends to the metadata itself as it seeks to represent collection items but also considers the impact such metadata would have on patrons as they interact with the library catalog. Conversely, legacy metadata is metadata created using an earlier system of metadata scheme, often resulting in outdated descriptive practices.[3] Oftentimes, legacy metadata includes outdated or potentially offensive terminology referring to diverse groups of peoples and cultures, due to being created in years past.[4] For the purpose of this article and within the context of the Inclusive Metadata Policy, legacy metadata is defined as metadata or descriptions existent in the library catalog that may include outdated or potentially offensive terminology due to being written in years past. In considering how to implement inclusive metadata throughout collection and item descriptions, library catalogers must also consider ways to remediate legacy metadata and engage in reparative description as necessary. It is in accordance with cataloging ethics that standards, including best practice guidelines and inclusive metadata policies, be created at the institutional level to perpetuate the creation of inclusive metadata and to remediate the harm caused by legacy metadata.[5]

As we examined other institutions' inclusive metadata policies, we noticed commonly utilized structures and components. The policies we reviewed included the University of North Carolina at Chapel Hill University Libraries' guide, the Harvard Center for the History of Medicine guidelines, and a variety of library statements on bias.[6] Other information we consulted included recordings and slides from a reparative description webinar hosted by the Society of American Archivists and a panel discussion hosted by the National Information Standards Organization.[7] Researching multiple points of view and policy variations helped us acquire a broader understanding of why others in the profession took certain actions.

Many policies utilized broad guiding principles to establish best practices for creating and implementing inclusive metadata, leaving much of the granular implementation up to cataloger discretion.[8] One commonly referenced guiding principle was cultural humility, which includes acknowledging and rectifying biases to address the impact of individual cultural preconceptions.[9] Other policies offered inclusive descriptive principles such as community-informed description and person-first language. Community-informed description involves consulting members of the community being described, or consulting resources created by community members, to determine the best descriptive metadata to apply. It is based on the cataloging principle of describing individuals and communities by using their preferred terminologies.[10] Person-first language is a descriptive practice in which catalogers describe the person first and the person's identity second, in an effort to emphasize the subject's humanity over their identity. For example, applying person-first language would change instances of the term "disabled person" to the term "person with a disability."[11] Several policies also referenced guiding principles related to sustainability, which involves establishing iterative or reflective processes to continually reassess and remediate metadata over time as part of an ongoing effort to improve inclusivity in descriptive practices.[12]

Further, many of the surveyed policies included a section that connected the purpose and importance of inclusive metadata with a larger university- or institution-wide initiative to promote diversity, equity, and inclusivity.[13] Most policies included a statement on how often and by whom

the policy would be reviewed. They frequently detailed how patron feedback would be received and incorporated by catalogers in creating inclusive metadata. Finally, many policies referred to trusted media reference guides, community style guides, or other separate documentation detailing application recommendations for catalogers to reference while implementing the inclusive guidelines and principles.[14] These guides allow catalogers to find ways to use inclusive language in metadata descriptions while also adhering to current industry best practices and descriptive standards.

Background

In 2020, the BYU administration commissioned a committee to review inclusion and belonging across campus. The main outcome of that committee was the creation of the Office of Belonging led by a new vice president of belonging with two associate vice presidents. This office developed a statement on belonging that was distributed across campus in August 2021.[15] With the university being supported by the Church of Jesus Christ of Latter-day Saints, this statement is backed by scriptural references and the university's mission statement.[16] The Statement on Belonging includes four main principles to help create a culture of belonging. The second principle, "we value and embrace the variety of individual characteristics, life experiences and circumstances, perspectives, talents, and gifts of each member of the community and the richness and strength they bring to our community," can have many applications across the university, such as making sure that all members of the university community can see themselves in the metadata representing library collections.[17]

As part of the university's annual resource planning process, every college and academic support unit is asked to submit objectives and priorities for the following year. From the Statement on Belonging, there are several projects that the library staff could undertake to value and embrace the unique members of the university community. One of the library's strategic objectives was to "provide extensive and convenient access to challenging, high-quality information," and a priority for 2024 to meet this objective included developing a policy and procedures for creating inclusive metadata to support a community of belonging.[18] Although most of the work of developing the policy took place in 2023, the policy and procedures will be implemented in 2024. This policy was created by the library's Metadata Management Committee (hereafter, Committee), which includes not only cataloging and metadata professionals but also metadata consumers across the library, including a subject librarian, special collections curator, acquisitions staff member, and an information technology professional.

Policy and Recommendations Document Creation

As the Committee embarked on drafting a library policy for inclusive metadata, they reviewed existing libraries' documentation for creating inclusive metadata, as explained in the literature review. After studying existing documentation, the Committee listed general concepts or principles that stood out as significant. The concepts or principles noted were primarily ones that appeared in multiple sources. This list included addressing patron feedback, determining what terms to use, handling new metadata versus legacy metadata, acknowledging past practices, and practicing cultural humility.

The Committee reviewed the university's Statement on Belonging and the Library Mission and Strategic Directions to identify other principles they needed to align the policy with campus initiatives. The second principle in the Statement on Belonging, as stated above, is the one that the Committee felt most applied to the new metadata policy. They incorporated quotations from the Statement on Belonging and the Library Strategic Directions into the purpose section of the policy.

The Committee then considered all the sources of metadata in the library discovery layer and website to identify the scope of metadata to include in the policy. As the Committee reviewed the various metadata sources, they divided them between library-controlled sources and external sources. The Committee determined that the library-managed sources would be easiest to place within the scope of the policy. These sources included the library catalog, finding aids, digital collections, librarian-created databases, the institutional repository, and database descriptions. External sources of metadata would be more difficult to update or change; however, the Committee wanted to include guidance on how to submit requests for changes to external sources somewhere in the policy or associated documentation.

After much discussion and research, the Committee divided up the list of general concepts and principles and began drafting policy statements. Each Committee member drafted a statement on their assigned principle, and then the full Committee reviewed the statements together in their monthly meeting. For about three months, policy statements were reviewed and refined. At least one statement was determined to be outside the stewardship of the Committee and was removed. Others were simplified.

As the Committee moved further into their reviews, members realized the need to divide the draft into the guiding principles that would make up the policy and the practical actions that would be included in a guidance document. Some of the statements were intended as instructional and seemed less appropriate as policy statements. The Committee moved these instructional statements into a separate recommendations document that would provide high-level guidance for metadata creators as they applied the policy. The recommendations document would also help creators understand the context of this policy within each of their sets of metadata standards and output types. The Committee's initial intent was to have the Cataloging and Metadata Department create and own the recommendations document.

When the Committee finished drafting the policy, they sent it to the library administration for review. Library administration provided helpful feedback and asked thought-provoking questions for clarification. Their questions focused primarily on the application of the policy, such as how the library staff can ensure metadata creators practice cultural humility, what the trusted terminology sources are, and how the library staff can ensure consistency among metadata creators. After discussing these questions, the Committee decided they needed to expand the recommendations document while they revised the policy. Library administration would benefit from seeing both together, especially since the recommendations document would expand upon and clarify the guiding principles of the policy.

The recommendations document contained the following sections when finalized: how to submit changes for non-library-controlled metadata; cultural humility principles, self-assessment, and training

resources; terminology (including subsections for person-first language, avoiding assumptions in ethnicity, gender, etc.), retention of offensive language, and resources for preferred terminology and guides to communities; priorities and workflow recommendations for remediating legacy metadata; and handling patron requests for review.

One of the sections of the recommendations document that the Committee was asked to clarify concerned the inclusion of cultural humility. The definition was brief ("a continuous process of learning, critical self-reflection, and growth"), and library administration wanted more information about what it meant in practice. The Committee decided to reach out to the Office of Belonging to discuss the policy draft and to write a better definition of cultural humility that was tailored more to the university community and mission. The Committee chair met with an associate vice president of belonging and discussed the overall goal of the policy and how cultural humility should be defined. They also discussed the possibility of having the Office of Belonging provide regular training on cultural humility for the library. The associate vice president was a great resource for improving the policy's coverage of cultural humility. The Committee also researched online self-assessments, trainings, and other resources on cultural humility that could help individual metadata creators learn more about the topic on their own time.

To address the library administration's question about trusted terminology resources, the Committee set out to research applicable vocabularies and other community resources to which metadata creators could refer. The cataloging and metadata community had already made great strides in the creation of community documentation, so the Committee was able to expand the list of resources in the recommendations document. A few communities had general media guides for terminology that creators could also utilize. Some of these resources included the GLAAD Media Reference Guide,[19] Archives for Black Lives,[20] Metadata Best Practices for Trans and Gender Diverse Resources,[21] Society of American Archivists Description Section: Inclusive Description,[22] and Best Practices in Authority Work Relating to Indigenous Nations in the US,[23] among others. Community-specific controlled vocabularies were also compiled and included Indigenous Subject headings from the Manitoba Archival Information Network,[24] Homosaurus,[25] the American Folklore Society Ethnographic Thesaurus,[26] and others.

Having a means for patrons to provide feedback was important, so the Committee discussed available avenues for external feedback. Rather than creating or implementing a new tool to gather this feedback, the Committee decided to use the feedback link currently on every library webpage or item in the catalog. This feedback is submitted as a help desk ticket, and the issue gets routed to the appropriate person, who will then review and correct the issue, as needed. Because this feedback system works effectively, the Committee decided to utilize it rather than try to create a new reporting process.

The Committee also discussed how to handle situations of harmful or outdated language taken from creator- or donor-supplied metadata. Examples of this kind were readily found in finding aids, where metadata tends to include larger narratives, notes, and devised titles for a wide range of archival materials. Archivists' efforts to supply information about the source of metadata in the past were sporadic, though guidelines were more recently put in place to require statements on the source of

metadata when it is reused. The archivist serving on the Committee, who is also an employee in the Cataloging and Metadata Department, used this opportunity to search the finding aids for multiple instances of data that could be repaired and used as guiding examples in the recommendations document. This process opened a wider discussion with finding aid creators to develop a guide for creating and editing inclusive descriptions in finding aids.

Once the Committee was satisfied with their drafts of both the policy and the recommendations document, the Committee had the drafts reviewed again by various stakeholders. The Cataloging and Metadata department reviewed the drafts first and provided valuable feedback, most of which was editorial. After the Committee integrated the Cataloging and Metadata Department's feedback, they then sent the drafts to both the library's Administrative Council and the Office of Belonging. The library's Administrative Council sent back other questions for the Committee to resolve. These questions included how metadata creators would determine the preferred terminology for a community when there are disagreements within the community, what cultural humility looks like in practice, and what principles would determine which patron feedback the library accepts or rejects.

Once the Committee addressed the remaining questions, the drafts were sent to the library's Administrative Council for final review and the Committee chair attended a meeting with the council to discuss the documents. After some discussion and minor revisions, library administration accepted the final drafts. The policy as approved may be found in appendix A and the current version of the recommendations document in appendix B.

Discussion

The new policy was rolled out to the Cataloging and Metadata Department right before the annual evaluations of staff employees were conducted. Consequently, approximately half of the staff employees within the department included a goal in their annual report to learn more about inclusive cataloging, to find ways to incorporate this policy in their workflow, or to identify projects that address potential issues in the metadata for collections they work with. As an additional result of our conversations surrounding reparative metadata, the Cataloging and Metadata department has embarked on several reparative projects to address outdated language and practices.

A recent reparative cataloging project, which began before the Inclusive Metadata Policy was approved, involved locating and changing call numbers on books still using N in cutter numbers referring to Black people. The subject headings were replaced globally in our catalog when the subject heading and cutter changes were approved by the Library of Congress. However, our Romance languages catalog librarian noticed that some older books in our library have never had their call number adjusted to reflect that N is no longer appropriate for this subject as a cutter. She has been working with a student to identify and change these cutters in the Latin American collections in our library. Working on this cataloging project has made us aware that there may be other outdated cutter numbers that have never been changed and are therefore considered offensive. Future discussion needs to occur to identify and change these call numbers.

Another recent project has involved working with the Library of Congress to change subject heading records containing the terms *Mormon* or *Mormons* to *Latter Day Saint* or *Latter Day Saints*, respectively. This change was brought about by a request from the British Library to the Library of Congress to change the term *Mormons*. Our library was contacted by the Library of Congress and asked to assist in determining the correct subject heading to refer to denominations in the Latter-day Saint (Mormon) movement. We agreed to participate in this project to encourage the wider use of this denomination's preferred name as well as the preferred names of other similarly impacted religious organizations. This process, which resulted in the analysis and revision of approximately 450 authority records, required collaboration with stakeholders such as the Archives and Libraries of The Church of Jesus Christ of Latter-day Saints; Community of Christ; the American Theological Library Association; and the Library of Congress Policy, Training, and Cooperative Programs Division.

Archival processors and other stakeholders in the description of the library's special collections have also been working on reparative language projects, with some of their work predating the work of this Committee. In February 2022, the library committee that coordinates archival processing began discussing the possibility of placing a banner on the library's finding aid websites. The goal was to provide a notice on finding aids that stated the library's desire to create inclusive descriptions and to provide contact information for researchers to offer feedback. Since the Office of Belonging had only recently been established, this library committee aimed to incorporate the new office's mission and provide the link to the university's Statement on Belonging. After seeking extensive feedback from various stakeholders in the library and working with IT, this banner was published in June 2023.[27] The library committee agreed that since researchers are more likely to access the library's finding aids through Google, landing on finding aids rather than the finding aid welcome page, this banner would be published as a footer on every results page within the finding aid database. A future update to the banner message would link out to a broader inclusive metadata statement planned for the library's webpage.

From June 2023 to February 2024, the banner on the finding aid websites did not generate any feedback. This lack of feedback may be more of a result of the finding aids being underutilized rather than the lack of problematic metadata. Another location where this banner could be placed is on the library's digital collections website; these collections feature digitized images of photographs and manuscripts that employ decades of legacy metadata, and the metadata is placed next to actual representations of archival material. It is likely that placing the banner there would generate more feedback about the appropriateness of language used in descriptions. The library has received infrequent feedback from researchers and users of external websites using digital collections metadata.

In addition to changing the website, staff have held discussions on how to handle legacy metadata in finding aids that should be preserved to provide context about the creator and contents of a collection, but which may utilize outdated or harmful language. As each scenario arises, discussions by staff on how to edit finding aids in a way that balances inclusivity with access is leading to guidelines about how to utilize finding aid note fields to accomplish this. Catalogers will be joining these discussions to decide how to add the notes to catalog records using 5XX fields.

Additionally, in conjunction with the university's Office of Belonging, we invited all library staff members to participate in cultural humility training. This interactive training, taught by a BYU associate vice president of belonging, emphasized the need for cultural humility in our interactions with patrons and in our library work. Allaya Cooks-Campbell defined cultural humility as "an approach to sociocultural differences that is 'self-first.' It emphasizes intersectionality and understanding one's own implicit biases. This approach cultivates self-awareness and self-reflection, bringing a respectful willingness to learn to inter-personal interactions."[28] The concept of "self-first" allows us to see, not in an egotistical, self-centered kind of way, "the many parts of ourselves, how we think about things, our perceptions, perspectives from lived experiences that play out in our day-to-day interactions, the unconscious mindsets that show up in our attitudes by how we treat each other based on how we see each other."[29] This mindset helps us develop the following traits of cultural humility: (1) curiosity and willingness to learn about cultural differences; (2) realistic, ongoing self-appraisal; (3) flexibility; and (4) humility and courage.[30] Once we develop the mindset of cultural humility, we will be better able to address outdated language and practices as we examine our metadata.

Conclusion

This case study has outlined the efforts of library staff and administration to create an inclusive metadata policy based on core principles laid out at the university level and integrated into the objectives and priorities of the library. The creation of this policy was assigned to the Metadata Management Committee, whose members included both metadata creators and metadata consumers in the library. The Committee surveyed policies from other institutions, identified the scope of metadata to be addressed, and sought feedback throughout the drafting process. A policy and accompanying recommendations document were eventually produced with strong investment from library leadership.

This policy immediately influenced individual employees' workflows and annual goals, as well as library websites, department mission statements, and description manuals. The application of the recommendations document has proven to be an iterative process, changing with feedback and the analysis of each specific metadata scenario, and continues to spur discussion at lower levels of the library. New ideas about reparative language projects that could be executed in the library are surfacing more frequently in department discussions. The Committee is still seeking more feedback about metadata, which may require additional insight into the usage and accessibility of our library collections.

Though the initiative to create an inclusive metadata policy aligns with the current practices of other large academic institutions, the journey for the university library to create its own policy has been unique to the mission of our institution. Having started with clear directives laid out by the Office of Belonging, the process of building a policy out of those directives has created a symbiotic relationship with the Office. With a broader emphasis on creating a culture of belonging, the policy highlights a core value of the university's mission that can be more narrowly applied by employees in their day-to-day decisions when creating, migrating, reusing, and preserving metadata.

Notes

1. "Statement on Belonging," Office of Belonging, Brigham Young University, accessed April 23, 2024, https://belonging.byu.edu/statement-on-belonging.

2. "Inclusive Description," Society of American Archivists, accessed April 23, 2024, https://www2.archivists .org/groups/description-section/inclusive-description.

3. Anne J. Gilliand, "Setting the Stage," Introduction to Metadata, third edition, Getty Research Institute, accessed July 12, 2024, https://www.getty.edu/publications/intrometadata/setting-the-stage/.

4. Marina Georgieva, "Metadata Remediation of Legacy Digital Collections: Efficient Large-Scale Metadata Clean-Up with a Sleek Workflow and a Handy Tool," *Against the Grain* 33, no. 1 (2021): 1.

5. Cataloging Ethics Steering Committee, "Cataloging Code of Ethics," ALAIR Home, January 1, 2021, https://alair.ala.org/handle/11213/16716.

6. Wilson Special Collections Library, *A Guide to Conscious Editing at Wilson Special Collections Library* (Chapel Hill: The University of North Carolina at Chapel Hill University Libraries, 2022), https://cdr.lib.unc .edu/downloads/5q47rz05z?locale=en; Harvard Center for the History of Medicine, "Guidelines for Inclusive and Conscientious Description," last modified January 11, 2024, https://wiki.harvard.edu/confluence /display/hmschommanual/Guidelines+for+Inclusive+and+Conscientious+Description; "List of Statements on Bias in Library and Archives Description," Cataloging Lab, accessed April 1, 2024, https://cataloginglab .org/list-of-statements-on-bias-in-library-and-archives-description/.

7. Stephanie Luke and Sharon Mizota, "Reparative Description" (webinar, Society of American Archivists, virtual presentation, June 8, 2022); Todd Carpenter et al., "Implementing Inclusive Metadata" (webinar, NISO, virtual presentation, March 8, 2023), https://www.niso.org/events/implementing-inclusive -metadata.

8. Jessica Serrao et al., "Clemson Libraries Inclusive Description Task Force Report," TigerPrints, December 23, 2022, https://tigerprints.clemson.edu/lib_pubs/202/.

9. Ellen Engseth, "Cultural Competency: A Framework for Equity, Diversity, and Inclusion in the Archival Profession in the United States," *The American Archivist* 81, no. 2 (September 2018): 460–82, https://doi .org/10.17723/0360-9081-81.2.460.

10. Wilson Special Collections Library, *A Guide to Conscious Editing*.

11. Rachel L. Frick and Merrilee Proffitt, "Reimagine Descriptive Workflows: A Community-informed Agenda for Reparative and Inclusive Descriptive Practice," OCLC Research Report, April 2022, https://www.oclc .org/content/dam/research/publications/2022/oclcresearch-reimagine-descriptive-workflows-a4.pdf.

12. "Guiding Principles for Reparative Description at NARA," National Archives and Records Administration, January 10, 2022, https://www.archives.gov/research/reparative-description/principles.

13. Charlotte G. Leilman, "Guidelines for Inclusive and Conscientious Description," *Center for the History of Medicine: Policies & Procedures Manual*, Harvard Wiki, last modified May 3, 2024, https://wiki.harvard .edu/confluence/display/hmschommanual/Guidelines+for+Inclusive+and+Conscientious+Description.

14. "Inclusive Description."

15. Kevin J. Worthen, "An Obligation to the World," BYU Speeches, August 23, 2021, https://speeches.byu.edu /talks/kevin-j-worthen/an-obligation-to-the-world/.

16. "Aims of a BYU Education," Mission and Aims, Brigham Young University, accessed July 30, 2024, https://aims.byu.edu/aims-of-a-byu-education.

17. "Statement on Belonging."

18. "Library Mission and Strategic Directions," BYU Library, 2023, https://lib.byu.edu/about/strategic-directions/.

19. "GLAAD Media Reference Guide—11th Edition," GLAAD, July 27, 2023, https://glaad.org/reference.

20. "Resources," Archives For Black Lives, April 15, 2022, https://archivesforblacklives.wordpress.com/resources/.

21. The Trans Metadata Collective et al., "Metadata Best Practices for Trans and Gender Diverse Resources," Zenodo, November 7, 2023, https://doi.org/10.5281/zenodo.10076876.

22. "Inclusive Description."

23. "Indigenous Authority Work Best Practices," Cataloging Lab, May 2023, https://cataloginglab.org/best-practices/.

24. "Indigenous Subject Headings in MAIN," Main—Manitoba Archival Information Network, accessed April 26, 2024, https://main.lib.umanitoba.ca/indigenous-subject-headings.

25. Homosaurus, accessed April 26, 2024, https://homosaurus.org/.

26. Ben Bridges, "AFS Ethnographic Thesaurus," The American Folklore Society, April 20, 2021, https://americanfolkloresociety.org/resources/afs-ethnographic-thesaurus/.

27. The full description of the banner reads as follows: "The BYU Library aims to create descriptions of collections that are inclusive and support an 'environment of belonging.' If you encounter language in finding aids, catalog records, or collection descriptions that you find offensive or believe to be harmful, we invite your feedback at librarydescription@byu.edu." Published at https://archives.lib.byu.edu/.

28. Allaya Cooks-Campbell, "How Cultural Humility versus Cultural Competence Impacts Belonging," BetterUp, February 14, 2022, https://www.betterup.com/blog/cultural-humility-vs-cultural-competence.

29. Lita Little Giddins, personal communication, April 4, 2024.

30. Melanie Tervalon and Jann Murray-García, "Cultural Humility versus Cultural Competence: A Critical Distinction in Defining Physician Training Outcomes in Multicultural Education," *Journal of Health Care for the Poor and Underserved*, March 25, 2010, https://doi.org/10.1353/hpu.2010.0233.

31. "Library Mission and Strategic Directions."

Appendix A. Inclusive Metadata Policy

1.0 Purpose

The BYU Library seeks to build "dynamic and inclusive" collections that are discoverable and understandable for all patrons.[31] The BYU Library aims to create descriptions of these collections that are inclusive and support an "environment of belonging." We strive to demonstrate that we "value and embrace the variety of individual characteristics, life experiences and circumstances, perspectives,

talents, and gifts of each member of the community and the richness and strength they bring to our community."[1]

This policy outlines principles to guide metadata creators in creating and updating metadata to achieve this purpose.

For assistance with application of this policy, see the *Recommendations for Application of the Inclusive Metadata Policy* document.

2.0 Scope

This policy applies to metadata in library-controlled resources. These resources include, but are not limited to, the library catalog, finding aids, digital collections, ATOM databases,[2] and database descriptions. This policy does not apply to harvested metadata from external sources over which library metadata creators have no immediate control or ability to make changes.

For guidance on submitting change recommendations to external sources, see *Recommendations 2.0*.

3.0 Definitions

3.1 *Cultural humility*: A continuous process of learning, critical self-reflection, and growth to identify and be aware of one's personal biases towards people of different cultures, backgrounds, religions, etc., to be better able to build relationships. Cultural humility is ultimately about engaging in the culture of God. Where "all are alike unto God," we are gifted the opportunity to learn, unlearn, and relearn more about ourselves to open our hearts to love more fully.[3] President Russell M. Nelson urges all of us to "do all in our power to build each other, learn from each other, and demonstrate respect for all of God's children."[4]

3.2 *Harvested metadata*: Metadata pulled from sources outside the Library to enable discovery in ScholarSearch.[5] This metadata is managed by vendors or other institutions. To update this metadata, users are typically required to submit a ticket or case to the vendor for review and potential remediation.

3.3 *Inclusive*: Including and valuing everyone; as free from bias as possible.

3.4 *Legacy descriptions*: Existing descriptions which may include outdated or potentially offensive terminology due to being written in years past.

3.5 *Metadata*: Descriptive data or information about a library resource.

3.6 *Metadata creator*: A person who creates metadata. This is not limited to members of the Cataloging & Metadata Department but includes anyone who contributes to or manages library-controlled resources as specified in 2.0 Scope.

3.7 *Metadata steward*: A person who oversees certain areas of library-controlled metadata. The metadata steward may be the same as the metadata creator. This is not limited to members of the

Cataloging & Metadata Department but includes anyone who contributes to or manages library-controlled resources as specified in 2.0 Scope.

3.8 *Person-first language*: A description which focuses on the person rather than their identity. Example: "People with disabilities" vs. "disabled people."

3.9 *Preferred terminology*: A description or word that is deemed to be the most appropriate and respectful way of referring to a community by that community and used by the BYU Library.

3.10 *Remediation*: An action taken to remedy something that is undesirable.

4.0 Guiding Principles

4.1 Metadata creators will be conscientious and intentional in using inclusive language in metadata descriptions where possible under current descriptive standards. To do so, metadata creators will practice cultural humility and engage in regular training to stay aware of personal biases.

4.2 Metadata creators will look for ways to incorporate inclusive descriptive principles such as person-first language, preferred terminology when referring to communities, and incorporating patron feedback as it corresponds with relevant principles and guides. Metadata creators will refer to trusted media reference guides, community style guides, or community members themselves for guidance.

4.3 The Cataloging & Metadata Department will create and maintain high-level guidelines for creating inclusive metadata and identifying and remediating insensitive legacy descriptions. Metadata creators can adapt the guidelines for their own work in coordination with a representative from Cataloging & Metadata.

4.4 The Library will maintain avenues for patrons to request a review of sensitive descriptive language. Metadata stewards will sincerely consider requests for review, applying library policy, professional best practices and descriptive standards in reviewing reported sensitive descriptions.

5.0 Policy Review

This policy should be reviewed every three years by the Metadata Management Committee to ensure compliance with current industry practice.

Notes

1. "Statement on Belonging," Office of Belonging, Brigham Young University, accessed April 23, 2024, https://belonging.byu.edu/statement-on-belonging.

2. ATOM refers to "A Table of Metadata" or a homegrown system for librarian-created databases.

3. 2 Nephi 26:33; Lita Little Giddins, personal communication, June 22, 2023.

4. Russell M. Nelson, "Morehouse College Peace Prize Award Acceptance Message," Newsroom, The Church of Jesus Christ of Latter-day Saints, April 13, 2023, https://newsroom.churchofjesuschrist.org/article/morehouse-college-peace-prize-award-acceptance-message.

5. ScholarSearch is the BYU Library's homegrown discovery layer.

Appendix B. Recommendations for the Application of the Inclusive Metadata Policy

Note: this recommendations document was current as of July 11, 2024, and includes the main text from the document with specific examples redacted.

2.0 Scope

While the scope of the policy includes only metadata in library-controlled resources, metadata creators are encouraged to seek other avenues for updating language in external resources provided by the Library. This includes actions such as submitting Library of Congress subject heading updates through the Subject Authority Cooperative Program (SACO) channels or submitting support tickets to vendors to consider.

In the BYU Library, all SACO requests should go through the Cataloging and Metadata department's SACO coordinator. For requests to vendors to update metadata, submit a ticket using the Feedback button in ScholarSearch. These will be reported to vendors using current library procedures for vendor feedback.

Guiding Principle 4.1: Cultural Humility

According to current descriptive standards, some fields, such as titles and contents, are transcribed from the item-in-hand rather than constructed or devised by the metadata creator. Editing these fields to include inclusive language would inhibit a patron's ability to locate the item. Metadata creators will most often not edit language in metadata that is transcribed from the item but will ensure that fields which they construct or devise contain inclusive language.

Ensuring that language is inclusive requires awareness of one's own personal biases towards people of differing cultures, backgrounds, religions, etc., as well as awareness of community preferences for identification. Acknowledging inherent bias in creation of new metadata and maintaining awareness of past harmful metadata practices will aid in the correction of harmful language.

The BYU Office of Belonging provides a training session on cultural humility. The Metadata Management Committee will arrange with the Office of Belonging to conduct this training for metadata creators every two years. All metadata creators will be expected to attend this library-sponsored cultural humility training.

Metadata creators are also encouraged to participate individually or as departments in other avenues for building cultural humility. This can include self-assessments, trainings, and other resources such as:

- Self-assessments and Tests
  - Diversity & Inclusion Group for Networking and Action (DIGNA) Self-assessment Tool
  - Project Implicit: Tests which aim to educate individuals on personal biases. This kind of testing method and its results may not be completely reliable or valid so interpret the results with some skepticism.

- Trainings
  - [Cornell's Intensive Training on Cultural Humility](#)
  - [University of Illinois Urbana-Champaign Culturally Informed Practice Workbook](#)
  - [Project READY, Module 8: Cultural Competence & Cultural Humility](#)
  - [Cultural Humility and Agility](#): LinkedIn Learning course
- Other Resources
  - [University of Oregon Cultural Humility Toolkit](#)
  - [Cultural Humility](#): Thirty-minute documentary on YouTube by a San Francisco State professor
  - [Hopeful Visions, Practical Actions: Cultural Humility in Library Work](#): book on principles to develop cultural humility in libraries

Supervisors of any student employees who are involved in metadata cleanup or creation of any kind should also consider including them in cultural humility trainings.

Guiding Principle 4.2: Terminology

Person-First Language

Person-first language is currently preferred over identity-first language. This means that metadata creators should refer to a group as "People with [condition or . . .]", rather than as "[Condition or . . .] person." For example:

People with disabilities	NOT	Disabled persons
People with mental disabilities	NOT	Mentally disabled persons
People experiencing homelessness	NOT	Homeless persons

However, people of various racial groups should be referred to using the racial description as an adjective, not a noun. For example:

Black people	NOT	Blacks
White people	NOT	Whites
Asian American people	NOT	Asian Americans

Avoid assumptions in ethnicity, gender, etc.

Contextualize description and assign subject headings so that whiteness is not assumed as the default, especially when identifying a topical subject related to race/ethnicity, or when identifying the race or ethnicity of a person. Brigham Young University should be referred to as a historically or predominantly white university to contextualize topics of race or ethnicity in collections.

Contextualize and add gender to descriptions and subject headings where gender is considered an important aspect or characteristic of the collection or item. However, due to societal complexities in

gender identity, avoid making assumptions about a person's gender. Follow international standards to not record gender when directed to omit, as is the case with name authority records.

In general, record characteristics if a person self-identifies or if found in a reliable source (official biography, etc.). Avoid assumptions based on your perceptions of their identity.

Retention of Offensive Language

There may be times when a potentially offensive legacy description must be maintained to preserve the original context of item's creator-supplied metadata. In those cases, metadata creators should add an explanation of the choice to maintain the data with an acknowledgment of its potentially harmful nature.

Resources

The following are resources that may be utilized to ascertain the preferred terminology of individual communities. Metadata creators should refer to appropriate guides, standards, and/or vocabularies (see list below for examples). Metadata creators are encouraged to counsel with other metadata colleagues after reviewing relevant resources about a particular community, and then to use their best judgment.

International Descriptive Standards

- Library of Congress and Program for Cooperative Cataloging (PCC) standards. Refer to individual vocabularies for guidance:
  - [Library of Congress Subject Headings (LCSH)](#)
  - [Library of Congress Demographic Group Terms (LCDGT)](#)

Guides for Specific Communities

- [Conscious Style Guide](#): Compilation of terms for a wide variety of communities
- [GLAAD Media Reference Guide 11th Edition](#): media guide for the LGBTQ+ community
- [Metadata Best Practices for Trans and Gender Diverse Resources](#): collaborative document by the Trans Metadata Collective and other library professionals
- [NAACP: Writing About Slavery? Teaching About Slavery?](#): guide for slavery topics
- [Archives for Black Lives](#): guide for archives of Black people
- [Harvard's Guidelines for Inclusive and Conscientious Description](#): guide for historical medical terms
- [Protocols for Native American Archival Materials](#): guide for Native American description
- [Native American Graves Protection and Repatriation](#) : guide for Native American description
- [Society of American Archivists Description Section: Inclusive Description](#): resources for archives
- [Best Practices in Authority Work Relating to Indigenous Nations in the U.S](#).: guide for Indigenous authority work

Community-Specific Vocabularies (this list is not exhaustive):

- [Crowdsourced list of DEI-specific controlled vocabularies (maintained by the AMIA Cataloging & Metadata Committee)](#)
- [Indigenous Subject Headings from the Manitoba Archival Information Network](#)
- [Xwi7xwa Library Guide for Indigenous Knowledge Organization](#)
- [First Nations, Metis and Inuit—Indigenous Ontologies (FNMIIO)](#)
- [Homosaurus](#) (LGBTQ+ vocabulary)
- [Anchor Archive Zine Subject Thesaurus](#)
- [American Folklore Society Ethnographic Thesaurus](#)
- [Human Relations Area Files Outline of World Cultures Codes (HRAF)](#)—list of codes rather than a formal vocabulary

Guiding Principle 4.3: Guidelines, Priorities and Workflows

Metadata creators should develop priorities and workflows for identifying and remediating insensitive legacy description. These remediation projects should be coordinated with the Metadata Standards Librarian and, if a larger scale project overlaps multiple stewardships, in consultation with the Cataloging & Metadata department chair or other relevant department chairs.

Metadata creators may seek Library IT (LIT) assistance in project development, i.e., by asking LIT to run reports on the catalog to look for specific terms or in consulting on automated means for metadata updates.

Metadata creators may also consider a tiered approach for their priorities, such as:

- Working on high-use collections first
- Identifying changes that can be easily done programmatically, like LCSH updates

Metadata creators are encouraged to consider ways for student employees to assist in metadata cleanup projects after proper training on appropriate terms.

Metadata creators may also wish to regularly review their priorities and goals for cleanup to ensure resources are being utilized efficiently or to align with campus, library, or other priorities.

Guiding Principle 4.4: Requests for Review

Library users may submit requests for metadata review if library metadata contains language they consider harmful. All requests will be acknowledged within a reasonable amount of time and reviewed at the lowest level possible. Metadata creators will not commit to specific changes suggested in the request but will make any necessary changes as prescribed by library policy. If a change is made which differs from the submitted suggestion, the metadata creator may offer an explanation based on Guiding Principle 4.2.

These requests will go through the existing helpdesk workflow.