EDITORIAL

Welcome to our March issue centred around the themes of equality, diversity, and inclusion within metadata work.

Although it might seem that these topics are relatively new, and while there has certainly been an explosion in reparatory work in the last few years, a brief look into the history of classification and subject categorisation will reveal that remedial work has been taking place for about 100 years at least.

This issue of C&I does, however, feel particularly timely within the context of current world wide political events. In the past month, the fundamental fragility of our metadata supply chain was put into sharp relief by decisions of the Library of Congress to fast-track changes the headings for the "Gulf of Mexico" and "Mount Denali". Longer term we are hoping to organise a national event, such as a World Café, and a consultation on how subject indexing can become better aligned with local vocabularies, spelling, and identities and become decoupled from foreign political agendas.

Various members of the UK cataloguing community, including the Wales Higher Education Libraries Forum (WHELF) cataloguers, have been in touch with us regarding these specific issues and the wider issues around the lack of a UK SACO funnel resulting in the dearth of suitable headings for UK concerns, plus the use of vocabulary that is not well known or understood by UK users. There is the desire for a

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unified effort to resolve this rather than relying on local initiatives and duplicated work using up limited time and resources. Further communication about these initiatives will be forthcoming – so do keep an eye out!

Back to the issue itself, a few years ago there was plenty of published material highlighting problematic areas, but far fewer giving practical examples of how to tackle these issues. In 2024 ALA/Facet published Inclusive Cataloguing: Histories, Context, and Reparative Approaches [Reviewed below] with a wealth of examples from the US, and hot on its heels Catalogue & Index offer you further ethical discussions, projects and practical information, with (although not exclusively) a more UK focus.

Gabriella P. Reyes article *Cataloguing the Empire: Classification as colonial project* puts us right at the heart of the problem as Reyes explores the colonial history of classification systems and the legacy we are dealing with today.

Lambert Tuffrey writes about *Cataloguing Buddhist literature in English: Ethical issues in an assay*, an interesting and unusual piece that looks at the creation of a catalogue of Buddhist texts, including the complexities of taxonomy around the subject matter and ethical issues that needed consideration.

Liz Cooper and Damien McManus in *Problematic subject headings: Making our catalogue more equitable, diverse and inclusive at the University of Bristol* bring us the first of several articles in this issue that discuss problematic subject headings in the library catalogue and how they are being dealt with. Techniques to tackle the problem may depend on the library management system used by the institution, at the University of Bristol they use OCLC's WorldShare Management Services, and the procedures described utilise the Locally Preferred Subjects feature of the system.

This is followed by Mouse Miller, Karen F. Pierce and Vicky Stallard's piece on *Forming an anti-racist and inclusive library catalogue at Cardiff University*, and the accompanying article looking at the technical side of the project. Working towards similar aims as the team at Bristol the Cardiff University LMS is Ex-Libris' Alma, and the work involved the use of normalization rules to help make bulk changes in combating inappropriate subject headings (LCSH and MeSH).

Tara Kunesh and Jude Romines' paper *Changing the Subject: The Homosaurus in Emory University's Library Catalogue* describes a project implementing the Homosaurus vocabulary into their LMS. They put the need for such a thesaurus into context, both culturally and within library catalogues, and also demonstrate how the current political climate in the US makes this work even more crucial.

Andrew McAinsh discusses a local scheme of subject headings within *Updating Subject Headings for Children's Literature at the University of Strathclyde: the Children's Theme Index*. Describing the revamping of an existing scheme to make terminology easier to understand and to be more inclusive, whilst also exercising better control

over how the scheme was managed. The paper includes details about turning a spreadsheet of terms into local MARC Authority records.

The utilisation of Homosaurus is further embraced in Emma Hallett's article *Narrowing the Diversity Gap: LGBTQ+ Zines, Metadata and Discovery at the University for the Creative Arts* which looks at incorporating EDI awareness into the enhanced cataloguing of a zine collection. Homosaurus was an ideal thesaurus for this particular collection, but going forward the team hope to engage with it within their more standard workflows.

Our final article by Jane Daniels is a timely update on a code that has been mentioned by many of our authors. In *The Cataloguing Code of Ethics since 2021: What Next for Your Code?* we hear about the endorsements and advocacy that have taken place in the last few years, and suggestions for its possible evolution.

Our issue also features several reviews of books that are relevant to our EDI theme, and, where possible, I hope you will be encouraged to engage with the titles themselves.

Our next issue in June will be all about metadata enhancement and AI so do contact us if you wish to contribute. Contact the editors at catalogueandindex@gmail.com.

Karen F. Pierce & Fran Frenzel, March 2025

Metadata &
Discovery
Group

Cataloguing the Empire
Classification as colonial project

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ABSTRACT

This essay explores the colonial history of classification systems and their role in controlling people and knowledge. The legacy of these colonial practices is evident in modern library classification systems, including the Dewey Decimal Classification system and Library of Congress Subject Headings. Through these explorations, I hope to illuminate the history and ongoing struggle for equitable and inclusive cataloging in libraries.

Introduction

> The existence of colonization relies on not only ongoing occupation of land but also occupation of regimes of knowledge erected to maintain and legitimate such occupation. (Roopika Risam, 2018)

From the Enlightenment onwards, classification systems have contributed to colonial epistemic control. This process included the introduction of racial categories and the assignment of superiority or inferiority based on these distinctions (Crilly, 2019, p. 9). For example, Carolus Linnaeus, a Swedish scientist known for his work in binomial nomenclature, created a descriptive classification of skin tones by continent (yellow in Asia, black in Africa, red in America, and white in Europe), reinforcing the idea of racial hierarchies (Crilly, 2019, p. 9). Historically,

> Classification of the global population by skin color was not undertaken by blacks, yellows, reds, and browns. Nor were they consulted. The process of classification was initiated and sustained by white men of letters and scientists who were the gatekeepers of Western and modern knowledge...it is whites who constitute the only knowing subject who can determine classification. (Mignolo, 2011, p. 45)

Decolonial scholars Quijano and Mignolo both emphasised classification – of people and of knowledge – as a means of colonial control. Quijano argued that colonialism

was not just about territorial domination but also about establishing a global racial hierarchy that classified people based on race and labour (Quijano, 2024, p. 95). This classification system served to justify exploitation and oppression, positioning Europeans as superior and others as inferior or subhuman (Quijano, 2024, pp. 85-87). Mignolo built on Quijano's ideas by emphasising the epistemic dimension of colonialism. He argues that colonialism imposed Western knowledge systems as universal and marginalised other ways of knowing and being (Mignolo, 2011, p. 80). This epistemic classification not only justified colonial rule but also continues to shape how knowledge is produced and valued around the world (Mignolo, 2011, p. 205). Both scholars highlighted how classification, whether of people into racial categories or of knowledge into hierarchies of value, serves as a mechanism of control and domination.

This essay explores the colonial history of classification systems and their role in controlling people and knowledge. The legacy of these colonial practices is evident in modern library classification systems, including the Dewey Decimal Classification system and Library of Congress Subject Headings. Through these explorations, I hope to illuminate the history and ongoing struggle for equitable and inclusive cataloguing in libraries.

Historical Review

Learning to Divide the World: Education at Empire's End (1998) by John Willinsky examines how education has been used both to perpetuate and to challenge imperial power structures. He notes that modern education and knowledge are dependent on the discoveries of the colonial project – however, this does not justify or erase five centuries of exploitation and domination (Willinsky, 1998, p. 53). Significantly, he describes how classification and categorisation have been instrumental in shaping Western knowledge systems and global power dynamics. Willinsky argues that the act of categorising knowledge, peoples, and cultures has historically been a tool of colonial control and that the 'themes of discovery, conquest, possession, and dominion are about ways of knowing the world, of bringing it to order, of surveying, mapping, and classifying it in an endless theorizing of identity and difference' (Willinsky , 1998, p. 85). He argues that it is important to explore recurring patterns connecting colonisation and knowledge that shape our understanding of the world today. Addressing this historical association is not a call for outright rejection of the knowledge amassed through imperialism; however, it is valuable from an educational perspective to investigate this knowledge while also considering what has been overlooked or overwritten in the construction of the modern world (Willinsky, 1998, p. 52).

The British developed an 'empire of information'. In India, British initiatives like the census gave the distinctions among India's many castes and tribes unprecedented focus, alongside an emphasis on religious differences between Hindus and Muslims (Willinsky, 1998, p. 43). In this way, British colonisers classified and controlled their

subjects, emphasising their differences to make solidarity difficult. The British also established a scholarly tradition in managing India. Colonial administrators found themselves increasingly involved in disciplines such as philology and geography, which ultimately contributed to their governance of the Indian subcontinent:

> Knowledge operated as a force, with *mastery of the subject* the operative educational metaphor and faith... It was all part of the British Empire's development of what we would call a global information system, with extended data feeds, lines of credit, and international postings. (Willinsky, 1998, p. 44)

The empire consistently linked power and knowledge to reinforce the legitimacy of categories like colony and empire. Through both scholarship and governance, India was consistently portrayed as a decaying society, with the empire positioned as the solution to this perceived deficiency to justify its rule. Colonial administrators stationed in India actively participated in an imperial pursuit of knowledge (Willinsky, 1998, p. 44). This is what Edward Said referred to as 'power using knowledge to advance itself' (Said, 1995, p. 4).

Colonisers classified the colonised, sorting not just knowledge itself but the people who created it as well. This movement was exemplified by the British Museum, 'the cataloging hub of the English dominions' in the 19th century (Willinsky, 1998, p. 34). Classification, cataloguing, and the sorting of knowledge were tools of the colonial project – even before the birth of modern libraries. In the 19th century, European museums started providing guides to sailors on how to collect and preserve specimens (Willinsky, 1998, p. 63). These amateurs were eager to 'discover' new specimens and classify them, often replacing Indigenous names and categories. It was as though this extensive cataloguing of nature could serve as a foundation upon which to build a new episteme.

Another clear illustration of classifying scholarship with an imperialist bent is the Encyclopédie, often considered emblematic of the Enlightenment. Published in stages throughout the second half of the 18th century and edited by Diderot, it appears to simultaneously recognise and classify the converging forces of imperialism and scholarship that aimed to dominate the world (Willinsky, 1998, p. 73). Barthes goes so far as to call it a 'huge ledger of ownership... to fragment the world, to divide it into finite objects subject to man' (p. 27). He continues to contend that 'we cannot separate without finally naming and classifying, and at that moment property is born' (Barthes, 1980, p. 27). In this way, the Western world established an 'intellectual mercantilism,' extracting facts and artefacts globally to support its theories and empower its classifying ability to observe, categorise, and rationalise the world (Willinsky, 1998, pp. 51-52). Willinsky critiques how Western classification systems have imposed hierarchical structures that privilege certain forms of knowledge over others, often marginalising Indigenous, non-Western, and non-dominant perspectives.

Discussion

Legacy in Current Systems

> Librarianship has been complicit, if not responsible, for perpetuating colonial approaches to knowledge by replacing traditional knowledge with Western knowledge, especially in physical libraries established under colonial regimes, by failing to maintain the authority of the indigenous people who produced the knowledge, or by stealing or appropriating the knowledge without appropriate compensation. Sandy and Bossaller, 2017, p. 132

The main classification systems used in libraries around the world today emerged in the late 19th century with the creation of the Dewey Decimal Classification system in 1876 and the US Library of Congress Classification system in 1897. These systems are not neutral; they reflect Western-centric perspectives and biases. Drabinski (2013) states, 'As users interact with these structures to search, browse, and retrieve materials, they inevitably learn negative stereotypes about race, gender, class, and other social identities' (p. 97). Doyle (2006) argues that the 'information industry [i.e. librarians and other information professionals] not only acts as a gatekeeper to knowledge, it also controls the interpretation of knowledge' through cataloguing and classification systems (p. 4). The Dewey Decimal Classification system, created by Melvil Dewey in the late 19th century, is widely used for organising library materials. It is hierarchical and rigid, placing books into fixed categories based on a numeric code, which may not reflect the complexity or multidisciplinary nature of modern knowledge. This rigidity can make it difficult to accommodate new or interdisciplinary fields of study – for example, computer science, which did not exist in the 19th century, falls into the number for 'information' but with many additional decimals for clarification. The system's logic reflects the cultural and social biases of its time. For example, the 200s category is for Religions, but all numbers until the 290s are exclusively for Christianity, with other religions combined with mythology. Before reforms by Howard University librarian Dorothy Porter, Black writers were classified in either 325 (colonisation) or 326 (slavery), regardless of their subject matter (Nunes, 2018). Dewey himself held racist, misogynist, and anti-Semitic views, which influenced the system's classification (Joseph, 2021). Jimenez et al. (2022) note the 'particularly unfortunate legacy' of the most common library classification systems, including 'antiquated, often racist, androcentric assumptions about the ordering of the world.' These systems not only complicate navigating library resources but also cause epistemic harm. Library classification systems are historically rooted in coloniality.

Intervention

According to White (2018), librarians around the world 'need to feel empowered to go beyond the Euro-American models of library cataloging work… Structures need to be in place to allow libraries and catalogers to vary the way they apply the necessary guidelines.' White (2018) argues that the issue extends beyond the cataloguing tools

themselves to the structures within which those tools, guidelines, and rules are embedded. Libraries could improve access to their resources by allowing cataloguers more flexibility. While systems like subject headings and classification numbers are necessary foundations, White (2018) contends that deviation is crucial for expanding access beyond current limitations. The author questions whether librarians prioritise these rules over user needs, often waiting for approval from larger institutions before implementing potentially beneficial changes locally. Two intervention approaches are reparative cataloguing and inclusive cataloguing. Inclusive cataloguing involves ongoing efforts to use inclusive language and represent diverse perspectives, while reparative cataloguing often involves specific projects or initiatives to revise and update existing records. Both approaches are essential for creating fair, accurate, and respectful library catalogues.

Indigenous librarians are also working towards creating their own controlled vocabularies. For example, the Saginaw Chippewa Tribal Libraries have created a new classification system called Maawn Doobiigeng (Gather Together). The tribal libraries originally used the Dewey Decimal Classification system (DDC), the Library of Congress Classification system (LCC), and Library of Congress Subject Headings (LCSH), which 'employ colonialist logic to classify and describe items relating to Indigenous people' (Saginaw Chippewa, 2024). This new system organises resources by the seven original clans and their responsibilities (Saginaw Chippewa, 2024). The system collects information in a way that is accessible and meaningful to the community, resonating with their cultural background and knowledge frameworks.

Conclusion

Through historical legacies, systemic biases, and ingrained practices, libraries can perpetuate colonialism and enact epistemic violence. Librarianship has, intentionally or not, upheld colonial methods of knowledge dissemination (Sandy and Bossaller, 2017, p. 132). This has involved replacing Indigenous knowledge with Western perspectives, especially evident in physical libraries established during colonial periods (Sandy and Bossaller, 2017, p. 132). To dismantle colonial structures and diversify collection development and instruction, libraries should aim to democratise knowledge, moving beyond Western-centric perspectives to include insights from the global majority (Clarke, 2021, p. 136). This involves questioning the nature of knowledge itself and addressing the marginalisation of Indigenous knowledge systems. By determining what qualifies as knowledge – through the collections libraries prioritise, institutional structures, and classification systems – libraries significantly influence perceptions of knowledge (Leung and López-McKnight, 2021, p. 320). The knowledge housed within libraries and archival collections is predominantly generated by white authors, reinforcing white dominance; consequently, libraries validate prejudiced, racially charged content as legitimate knowledge. This historical trend must be challenged.

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Cataloguing Buddhist literature in English
ethical issues in an assay

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ABSTRACT

Having been ordained for twenty-five years as a Buddhist monk, I have a vested interest in being able to present to Westerners a knowledge and understanding of the full extent of the 'Three Baskets' of the Buddha's teaching, which is to say; the Tripitaka. For Western Buddhist monastics, or serious lay people generally, such an understanding used to require extensive study in foreign languages, such as Pali, Chinese, Japanese, or Tibetan. I believe it no longer does due to the volume of traditional Buddhist texts that have been translated into English over the course of the last two hundred years.

This belief however, presupposes a comprehensive inventory in which the individual works, in their English language versions can be presented in relation to each other, a resource which hasn't previously existed.

This article describes the creation of a new catalogue to hopefully meet that need, illustrating a particular ethical issue that was encountered.

Over the course of the last couple of years I have managed to compile a catalogue of bibliographic material that has not previously been recorded in one location. I am calling it 'The Democratic English Tripitaka' as it lists every Buddhist literary text, written before the year 1900 that has been translated into the English language.

Since my catalogue is as yet unpublished I remain very much an amateur cataloguer, and therefore I hope this article will read like a series of questions, rather than a series of assertions. I am very open to advice.

I should explain that since 1998 I have lived and worked full time as an ordained monk at Throssel Hole Buddhist Abbey, a monastery and retreat centre in the North of England. Although the project I have taken on relates to my vocation, it is not actually central to it, as my vocation is the practice and teaching of meditation and the ethical Precepts of Soto Zen.

Since my ordination I have kept notes of my spiritual reading for my own benefit, and as the years have passed the notes have added up to the point where I realised that there was in fact no central resource I could refer to which would relate the various translated texts I have encountered to each other in a semantically meaningful way. Also, it so happens that in many cases there are several translations of the same text which, because they have different English titles, are very hard to recognise as versions of the same basic work. Not only that, but the texts I am interested in are sometimes half-hidden in books, articles or dissertations in which the presentation of the translation is only incidental to the authors main subject, and the name of the text is given in non-Latin script. In other words, *discovery* has been very much an issue.

In a recent edition of this journal, Veronica Ranieri, a Cataloguing Policy Specialist at the Library of Congress wrote: 'When learning about a discipline and mapping it out in a controlled vocabulary... the amateur proceeds with enthusiasm and wonder. The delight a person experiences when reaching an understanding of a topic is not something that can be conveyed through professional training. Instead it is a result of approaching the topic with a receptive, even reverent disposition.' ([Ranieri, 2022](#)). I was pleased to read this because it accurately describes my own experience. For some reason, the process of compiling a catalogue, where one has not previously existed has been, and is, for me an ongoing source of joy!

There are of course a number of thorny issues that I have encountered in the course of my cataloguing journey, some of which are ontological, and some very much ethical. In order to explore these I will need to explain the content of my catalogue in a little more detail.

To begin with, the field of Buddhist literature exists to pass on the teachings of the Buddha. It is soteriological in outlook, in that it seeks to assist the reader in their journey to salvation (from suffering), yet the Buddha himself didn't write anything down, nor did any of his immediate disciples. In fact nothing was written down until several hundred years after the Buddha's *parinirvana* (death). It was only when a council was eventually convened to compare the disparate oral versions of the Buddha's teaching that were in circulation, that the remembered teachings were made tangible.

Later on, among the geographically distant monastic *Sanghas* (followers of the Buddha), there eventually arose different versions of these written teachings, some in the Sanskrit language, and some in Pali. The first texts that were written down were the *Sutras* (the scriptural texts), but then two other bodies of literature also came into existence: the *Vinaya*, (the rules for the *Sangha*), and the *Abhidhamma*, (exegetical texts, written in order to draw out the implications of the Sutras).

Here lies the first ontological problem, for while the Abhidhamma texts are traditionally described, alongside the Sutras and Vinaya texts as, 'Words of the Buddha', they must, realistically be attributed to later hands since they record material

obviously created after his death. Yet it was only when the first Tibetan catalogue of Buddhist literature was created, the *Denkarma*, which was published in the year 812, (Halkias, 2024), that the firm ontological distinction between 'Words of the Buddha' and 'words of Buddhist teachers' was formulated.

In Tibetan Buddhism, to this day there are two catalogues of texts (translated from Sanskrit into Tibetan): the *Kanjur* for the Words of the Buddha, and the *Tanjur*, for the words of Indian Buddhist teachers. This was the Tibetan solution to the problem of classification.

The Denkarma was by no means the first catalogue of its kind however. China had embraced Buddhism many centuries before Tibet, and had an even longer history of cataloguing. A notable catalogue called *Kaiyuan* was printed, in the year 730, (Wu, 2020). Like the Denkarma catalogue, it also listed translations of, a very similar, though not identical corpus of Indian Sanskrit texts — but naturally enough these were translations into Chinese, rather than Tibetan.

Hopefully it is clear then, that when Western scholars first encountered this literature they were faced with multiple versions of what were essentially similar works, but created over the course of many hundreds of years, created in disparate geographical locations, consisting of translations of numerous alternative editions, and with each edition itself based on considerable numbers of, often no longer extant manuscript witnesses, in a variety of difficult scripts. In many cases there is no actual *work* remaining from which the *versions* can be shown to derive. Indeed, there may never have been an original work in some cases at all, hence there are issues of authenticity too!

Over the course of what is, by now nearly two hundred years, Western scholars have rendered, in total (according to my research), 800 of those Chinese and Tibetan translations into English. It would be easy to lump all these English translations together in a catalogue, *but are translations into English of a Chinese version of a Sanskrit text, the same as English translations of Tibetan translations of a Sanskrit text?* What about translations into English directly from the Sanskrit, when the Sanskrit manuscript still exists? Arguably, for current cataloguers the Bibframe 2.0 vocabulary of Works and Versions is inadequate to encapsulate the complexity when English versions are versions of Tibetan versions, which are versions of Sanskrit versions, which are versions of works in yet earlier languages that weren't written down because they were preserved orally. But perhaps I am not understanding something here?

There are concordances between *versions*, certainly, and where these exist I have indicated them in my catalogue, but finding a taxonomy that would permit different *versions* of similar *works* to be held together in semantically meaningful relationships was a challenge that required an innovative approach, *as no unified catalogue of all this material has ever been created before*.

My solution has been to create separate bibliographical listings in the following chapters:

- Indian records of the Words of the Buddha translated into English.
- Indian records of the words of Buddhist Teachers translated into English.
- Chinese records of the Words of the Buddha translated into English.
- Chinese records of the words of Indian Buddhist teachers translated into English.
- Records of the words of Chinese, Korean & Japanese Buddhist teachers translated into English.
- Tibetan records of the Words of the Buddha translated into English.
- Tibetan records of the words of Indian Buddhist teachers translated into English.
- Records of the words of Tibetan Buddhist teachers translated into English.
- Records of the words of Buddhist Teachers in English.

This categorisation is sufficient to allow all Buddhist texts (written before the year 1900), with translations into English to be ordered, and also allows a final chapter to include bibliographical listings of Buddhist texts originally written in, or first published in English. This innovation places them alongside those texts written in the traditional languages of Buddhism. Such is the potential power of the cataloguer!

Ordering the listings within each of the chapters above was most simply achieved by using pre-existing taxonomies, since that allowed the use of existing catalogue numbers. Overturning the work of generations of previous scholars of the Tripitaka was never my intention.

To begin with, Indian records of Buddhist texts translated into English consist of translations from two distinct languages: Pali and Sanskrit. Whereas Pali texts have been organised into a taxonomic list since the early twentieth century — they were outlined and numbered in the bibliography of the Prolegomena to Volume One of *A Critical Pali Dictionary*, (Trenckner, 1924) — Sanskrit texts were never part of an organised 'canon', and as such were never given catalogue numbers. This meant that the only current authority, is a database of digital texts created and maintained by the University of the West (UWest) in Rosemead, California, called the *Digital Sanskrit Buddhist Canon* (DSBC). An expert in the field, Dr. Alexander J. O'Neill was able to assure me independently that the taxonomy UWest has adopted is not only reliable, but ethically appropriate, since the scholars directing DSBC hail from Nepal, where many of their existing Sanskrit manuscripts are preserved.

The situation with regards to the pre-existing taxonomies for Chinese, and particularly Tibetan texts is less ethically straightforward, however, which leads on to some ethical questions that relate to the *Cataloguing Code of Ethics*, prepared by

members from cataloguing communities in the U.S., Canada, the U.K., and other countries, and endorsed by CILIP in spring of 2022.

The supporting material for the Code contains the following; 'Cataloguing standards and practices are currently and historically characterised by racism, white supremacy, colonialism, othering, and oppression.' (Cataloging Ethics Steering Committee, 2021). This is arguably true when the material being catalogued originates from Western environments, however the catalogues of Buddhist material most commonly used in modern Buddhist Studies are primarily of Japanese origin.

In the 1930s Japanese scholars created a catalogue called the *Taisho Tripitaka*, (Takakusu, 1924). This updated all the earlier Chinese catalogues according to Western scientific knowledge organisation principles. It is still the leading reference for East Asian Buddhist works. However, while it adds autochthonous Japanese Buddhist texts alongside Chinese works, it chooses not to add the very many Korean works that could have been added (another instance of the power of the cataloguer). It is worth bearing in mind that Japan had annexed Formosa (Taiwan), in 1895, conquered the Korean empire in 1910, and was in the process of violently occupying Manchuria in the 1930s as well.

With regards to Tibet, the Tibetan people escaped military predation from Japan, but its monastic institutions, in an academic sense did not. In 1934, *A Complete Catalogue of the Tibetan Buddhist Canons*, was published by 'Tohoku Imperial University', in Japan, (Ui, 1934). This catalogue presented the Tibetan Kanjur and Tanjur according to Western scientific principles.

Though again, this catalogue is still in use, arguably aspects of its creation were a case of cultural appropriation by Japanese scholars, caught up in the rise of Japanese nationalism. In particular, the siglum used to number texts in the Tohoku University catalogue did not reflect the Tibetan origin of the texts, but imposed upon them a reference to the university itself, in Japan. That is to say, the original edition of the Kanjur and Tanjur had been prepared in the Derge monastic complex in Tibet in the 1770s, yet the Tohoku catalogue labelled each text with a Toh. number.

Although there are, generally speaking questions about the ethical behaviour of Japanese scholars in Japan in the 1930s, to the extent that we fail to recognise this, there are also questions for us in the West. While we now firmly understand the potential for knowledge organisations (as it says in the Cataloguing Code of Ethics), to 'codify systems of oppression', it is easy to assume that the origin of those systems of oppression are necessarily 'white supremacy'. In fact, the words I quoted above, used to describe the scope of the code, that go on to say; 'Cataloguing standards and practices are currently and historically characterised by racism, white supremacy, colonialism, othering and oppression', could arguably be said to just as accurately describe the practices deliberately or inadvertently instituted by those Japanese scholars in the 1930s. Of course, we would hardly describe them as supporting 'yellow

supremacy'! Especially not since the Library of Congress Subject Heading 'Yellow Peril' was flagged as racist by Sandy Berman, in *Prejudices and Antipathies*, ([Berman, 1971](#)).

The point ultimately is that the effect on societies of racism is deleterious, from whatever source it comes, and it would be ironic if a Western-centric bias inadvertently coloured attempts to diminish it.

To this end, I was pleased to discover that the *Cataloguing Code of Ethics* clearly understands this. I hope that by involving greater input from non-Western cataloguing communities in the future, any lingering Western-centric bias in its wording may be overcome. I imagine that Chinese cataloguers, and metadata managers for instance might be interested in countering the long term effects of the bias(es) of Japanese scholars during the early twentieth century? This would be to everyone's benefit.

As for my own catalogue, the total number of works with translations into English (as of May 1st 2024), stands at 1860. The number of new texts receiving their first translation year on year however, is increasing *exponentially*. My hope is that with the dataset now accessible online via my Orchid ID, it will be possible for interested parties to adopt the classificatory system I have created and suggest additions or changes to it as new texts are translated. This crowd-sourcing of bibliographic references may be the only way one person can maintain a catalogue such as this into the future, especially as AI makes the task of translating texts more and more straightforward. It would also be the justification for my description of the English Tripitaka catalogue as 'democratic'.

As for providing interoperability in order that other databases (such as the *Buddhist Digital Archives*) should be able to draw upon my dataset as it develops, the coding necessary to build the interface is beyond my skill set currently, but, as I mentioned at the beginning, the cataloguing journey remains a source of Joy!

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Problematic subject headings
Making our catalogue more equitable, diverse and inclusive at the University of Bristol

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ABSTRACT

Subject headings have increasingly been the focus of attention from students, researchers and librarians, particularly in relation to headings which causes distress and offence. By using the Locally Preferred Subjects feature of OCLC's Worldshare Management Services library services platform currently in use at the University of Bristol, we were able to plan and implement a procedure to analyse and replace where necessary harmful subject headings. We describe the workflows and processes associated with this project, focusing on the technical and organisational challenges that we encountered and the solutions we found, and how we will maintain and progress the project in future.

Introduction – landscape at the University of Bristol

The University of Bristol is a large university in the Southwest of England. As an institution, the university has been putting Equality, Diversity and Inclusion at the top of its agenda for some years. In the Library, working groups have arisen in the past decade to reflect this: for example, the Decolonising Working Group and the Inclusive and Accessible Library Forum.

WorldShare Management Services/WorldCat

Our library services platform is the cloud-based WorldShare Management Services (WMS) from OCLC. WMS is founded on WorldCat, a union catalogue and database, with thousands of subscribing and member libraries contributing their metadata around the world. Our discovery layer, Library Search, has a local layer as well as a worldwide layer. Our users can conduct a search within our local holdings or expand that search to the worldwide layer (WorldCat.org).

WorldShare Locally Preferred Subjects feature

In the Autumn of 2022, OCLC introduced a new functionality to WMS, the Locally Preferred Subjects Feature. This tool arose from a community research project, the Reimagine Descriptive Workflows Project, conducted by OCLC to look at cataloguing practices and workflows across its subscribing libraries. The outcomes of this project led to OCLC's overarching Diversity, Equity and Inclusion (DEI) initiative. One strand of this initiative was to enable libraries to replace harmful and offensive subject terms in the discovery layer at a local level. Users would still be able to conduct searches using their preferred language and terms would only be replaced in the local discovery layer, not globally or within MARC records. OCLC recognised that one size did not fit all: decisions around which terms were deemed harmful or offensive and how these terms should be replaced needed to be made at individual institution level.

In October 2022, we decided to form a cross-team Subject Remapping working group within the library to look at ways to utilise this new tool within our discovery layer. We wanted to develop local practices and workflows, taking technical challenges into consideration and exploring ways in which we could make informed choices about local subject replacements.

The Locally Preferred Subjects Feature has undergone several iterations and has gradually become a more sophisticated tool.

How we decide on subject areas

The libraries at the University of Bristol include extensive printed collections, classified using the Library of Congress classification scheme (LoC), and electronic books and journals. The collection is too large to analyse as a whole, so we agreed that we would start by looking at the subject headings in the collection in our largest library, the Arts and Social Sciences Library (ASSL). This collection represents around 40% of our print holdings. The process could be expanded later to look for related and additional headings in collections in our other libraries.

Our first focus was therefore a relatively small LoC range: HT851 to HT1445 that has enslavement as its focus. We then identified several other targeted areas:

- HV1551-HV3024 (entitled in the LoC schedules "People with disabilities")
- Sequences in the R range, for instance RA418-RA790 (broadly "Public aspects of Medicine")

These were chosen to enable us to identify problematic headings and the suggestion of alternatives.

Identification of alternative terms

Before starting the analysis of subject ranges, we gathered policies, lists of preferred terms and position statements from library, archive, and museum websites. Preferred term lists are especially useful for analysis of some terms, particularly those relating to enslavement. Fortunately, there is a wealth of valuable resources freely available, for instance Nottingham City Council's glossary of terms relating to Transatlantic enslavement (Nottingham City Council, no date). Some terms relating to subjects such as disability and medicine are more contested. While they are seen as problematic to some, others see them as being acceptable. Over time meanings and contexts change. This can lead to some keywords causing offence or distress. For discussions on this see, among others, Kenny et al., (2016) and Cho et al., (2023). We decided not to change a small number of terms which could be seen to be harmful as we could not produce preferable alternatives. An example is 'Geriatric', pejorative in some contexts but also a branch of medicine. Where problematic terms were identified, we included sources for the preferred terms, logged on a spreadsheet for future reference.

How we extract the data

Metadata specialists in our Collections and Metadata teams designed a workflow for extracting subject headings from our catalogue. Our Collections Librarian is particularly adept at designing ways to extract data from multiple systems and distilling data into a workable format. He designed a workflow for extracting subject headings that could be broken into the following tasks:

- Retrieving the catalogue records for the books in the relevant subject area (in Excel lists)
- Extracting the bibliographic data from the catalogue records (in MarcEdit)
- Extracting the main subject headings from the bibliographic data in the catalogue records (in MarcEdit and Excel)
- Sorting the subject headings for analysis (in Excel)
- Presenting the data for use by the wider team (in Excel)

The Collections Team regularly ran reports to extract a list of records of holdings in ASSL into Excel lists, so this metadata was always up-to-date and readily available to work on. Excel lists included basic bibliographic data (author/title), Library of Congress class marks and system numbers. A range of agreed class marks within the spreadsheet could be selected from the classification column, the OCLC numbers in the rows from that range (system numbers for MARC records in WorldCat) could then be highlighted, copied and then pasted into notepad to be worked on.

In MarcEdit, we could use the Batch Search option in the Z59.50/SRU Client to search for the OCLC numbers in our list and retrieve the bibliographic records from our instance of WorldCat. Within MarcEdit, we could then use MarcBreaker to convert the retrieved records from (.mrc) into a format that would be easier to work on (.mrk).

From the latter file, we extracted the 650, 651 and 653 subject fields and copied them to a clipboard in MarcEdit to paste into a new workbook in Excel.

The raw data in the Excel workbook could then be refined (removing pipes and dollar signs, duplicates etc.) and the recurrence of certain terms across the specific subject area revealed. In this way, a spreadsheet containing headings and subheadings from the following schema was created: LCSH, LoC, FAST, MeSH and ILOT. We chose these as they are the main English language schema. This resulting spreadsheet of controlled subject headings could then be shared with the wider working group.

How we identified problematic subject terms and found alternatives (mapping, sources)

After harmful headings had been identified within the spreadsheet, we searched for them in the list of all subject headings in our records in ASSL (in Excel), found identical ones present in other parts of the whole library print collection, and replaced those at the same time.

How we uploaded new terms (upload spreadsheet in Config)

When the WorldShare Locally Preferred Subjects Feature was initially rolled out, OCLC envisioned all institutions utilising one universal template (Google sheet) to share suggested subject terms. In practice, institutions tend to download and localise the master Google sheet to reflect their locally preferred subject features. Some suggestions made by other institutions might be adopted universally, but equally, one size does not fit all. Many OCLC institutions are based in the United States. A preferred subject term in the United States could have a different nuance in the United Kingdom or elsewhere, or might not be a term that is recognised, and vice versa. Even within the same country, different institutions might choose different preferred subject terms. Furthermore, the maximum number of lines available in the master template is 2000. If all institutions used the same template, preferred subject terms would likely exceed 2000 lines very quickly.

For the reasons above, we created a local instance of the master template. We have access to a WMS and configuration sandbox. This enabled us to test how the feature behaves in the discovery layer and make adjustments where necessary. Being able to test the tool proved particularly useful when using wildcards and truncations.

After each class mark area was interrogated, we added new problematic subject terms to this sheet, and re-uploaded the sheet into the WMS Configuration dashboard. Uploading the sheet was incredibly easy and the changes surfaced in the Discovery layer almost instantaneously. Replacing the subject terms did not alter bibliographic data in MARC records at local or global level; it merely replaced the term in our local instance of WorldCat Discovery, with users clearly able to see the problematic terms that this feature replaced.

Latest search feature: local search expansion

In the latest iteration of the Locally Preferred Subject Feature, OCLC have introduced additional functionality, specifically for local search expansion. Users can expand their search using their preferred language: either using a replaced subject term or using their (problematic) preferred term. This iteration requires the use of a new template. It allows terms to be ranked as 'inclusive' or 'exclusive'. 'Exclusive' terms are not displayed to the user by default. This aspect of the new feature could involve a lot of extra staff time and endless decision-making. It could also be more time-consuming because wildcards and truncations do not work in this feature. For this reason, we decided to take the practical approach and implement this new feature in its simplest form. We are mirroring what we have done with the original template: listing our replacement terms and the terms that they replaced.

How this works in WCD

What do our users see when they conduct a search in WorldCat Discovery? In the first iteration of this tool, users could conduct a search using their preferred language. When we implemented the original feature, users conducting searches using a subject term that had been replaced received a pop-up alert to inform them that the term had been replaced. The message emphasised that the original term was still being included in a search of the catalogue:
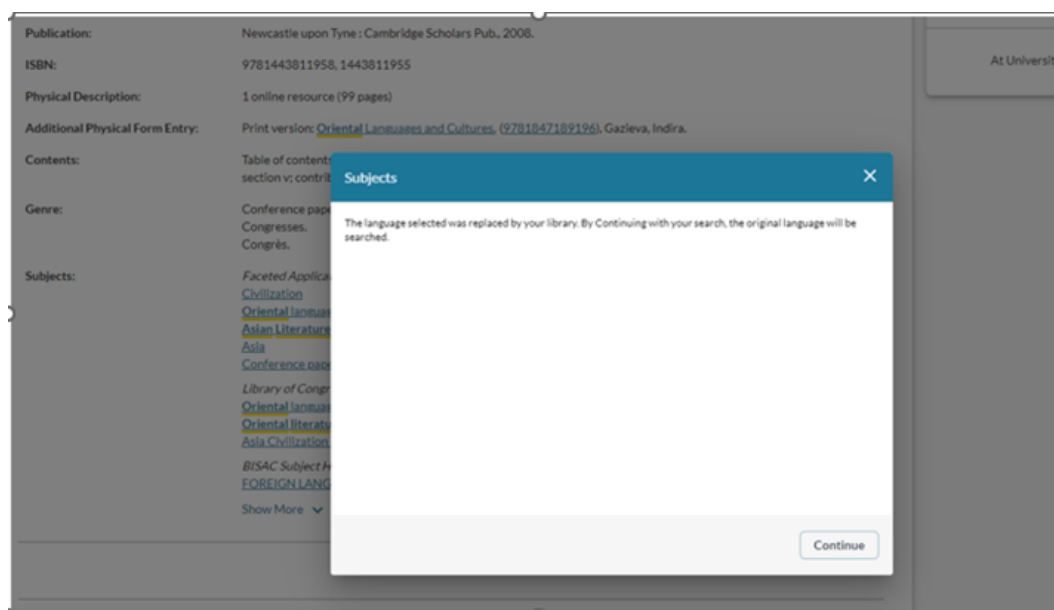

Figure 1: Original pop-up from the Locally Preferred Subject Feature in WorldCat Discovery.
This image is a screenshot/capture taken from OCLC's WorldCat Discovery, which is copyrighted by OCLC. All rights are reserved by them, and this image was used with their gracious permission.

In the subsequent iterations of the original tool, subject searches continue to include both problematic and replaced subject terms. Users are given the option to search using both the replaced search term and the original (problematic) term. They are then

given the choice to continue the search with corresponding problematic subject terms in the underlying bibliographic data, or just with their preferred term.

With the latest functionality, the process is almost the reverse: if a user searches with a term that has been identified as problematic and replaced in the local discovery layer, they get the option to expand their search to include search terms that correlate to their term (less harmful replacement terms) or just with their preferred term. For example, if a user searches using the term 'slavery' and finds a resource they want to view, they can click on the resource title to open the full record:
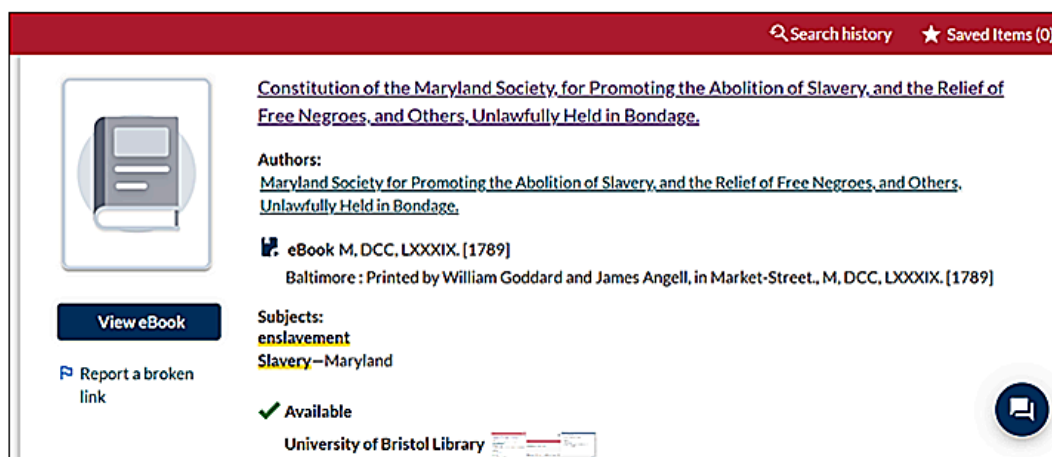

Figure 2: WorldCat Discovery record with highlighted subject terms.
This image is a screenshot/capture taken from OCLC's WorldCat Discovery, which is copyrighted by OCLC. All rights are reserved by them, and this image was used with their gracious permission.

If they click on the replaced subject heading 'enslavement' (underlined in yellow in Figure 2 above) to expand the search in that direction (in lower case as a consequence of replacing the term as part of a string), they arrive at this page:
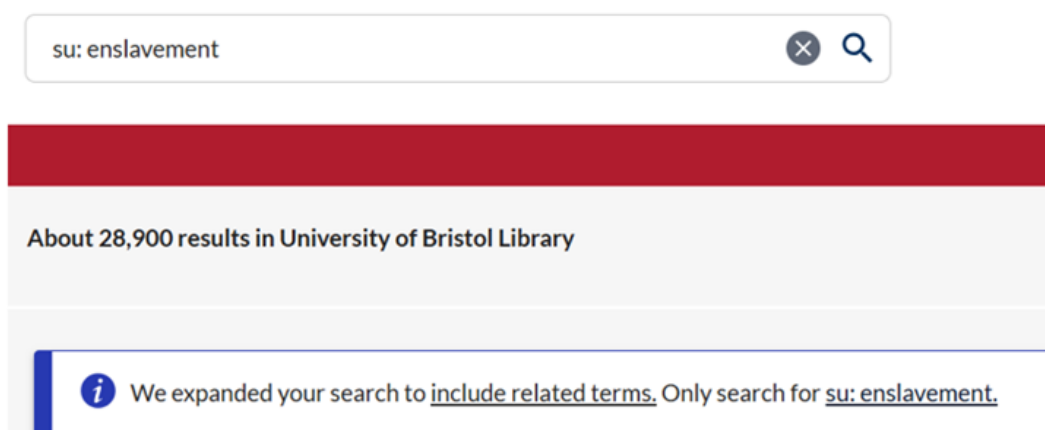

Figure 3: Expanded subject search in WorldCat Discovery.
This image is a screenshot/capture taken from OCLC's WorldCat Discovery, which is copyrighted by OCLC. All rights are reserved by them, and this image was used with their gracious permission.

As we replaced the term 'slavery' with 'enslavement', the new functionality gives the option to click on the 'include related terms'. Once clicked on, there is another option to expand the extra heading 'sensitive terms'. This is how we can tell the difference

between the usual search expansion and the kind enabled by the problematic language workflow of the new feature:
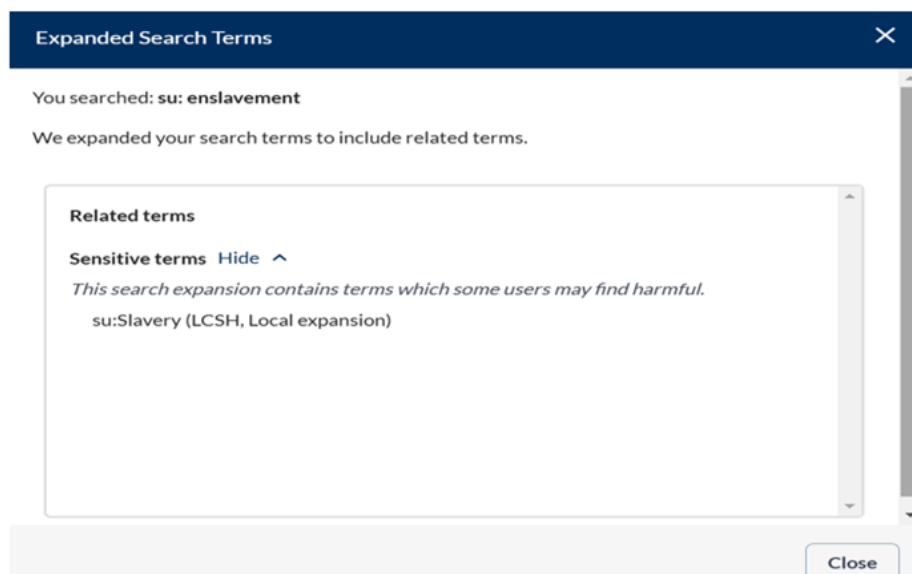

Figure 4: Expanded search terms pop-up in WorldCat Discovery.
This image is a screenshot/capture taken from OCLC's WorldCat Discovery, which is copyrighted by OCLC. All rights are reserved by them, and this image was used with their gracious permission.

How we promote the project

We have a web page dedicated to our subject headings review on our library website: https://www.bristol.ac.uk/library/find/subjectheadingsreview/. This gives information on what we are doing and why. Users are invited to complete a form if they have suggestions for subject heading replacements they encounter. The submission can be anonymous. So far, we have not received any completed forms.

What we have learned

The process outlined above is now firmly in operation, with three of the group members working on downloading subjects for review, and the other members (mainly subject specialists) working through the terms. We have learned the following:

We have only found a handful of harmful subject headings that we have needed to replace. Subject areas that we have thought would be knotty, have proven to be relatively straightforward. Perhaps this reflects the reparative work that both the Library of Congress and OCLC (with FAST headings) are doing to update subject headings. These terms are being added to bibliographic records in WorldCat at global level by OCLC.

Some terms are highly contested and their meanings can vary depending on the context.

Wildcards do not currently work in the original template where subject terms have subheadings. We will feed this back to OCLC. It would be too onerous to create lines in the templates for all the instances with subheadings, so we are hoping that OCLC will address this in a future iteration.

We have not had any feedback from users. We are aware that many users are searching for known items. For those conducting subject searches, they are more focused on retrieving relevant search results rather than on the subject terminology itself.

Ongoing and future work

Once we have exhausted all the subject areas in ASSL, we aim to turn our focus to our other libraries whose collections are outside the arts and social sciences. This might prove to be a bigger challenge for collections which are not classified with LoC.

Cultural, political and scientific contexts are constantly shifting and evolving, which means that our project will be iterative. Accordingly, we will need to devise a method for verifying subject headings which have been amended and those that remain current and acceptable.

Talking to the wider UKI WMS User Group is helpful. A small number of members of the Subject Remapping Group meet with colleagues from three other institutions who also use WMS. These meetings are a good opportunity to share knowledge and best practice about workflows and replacement terms. As Bristol is a comparatively large institution there is the staff capacity to undertake the project we have described. Smaller libraries may not have as many staff available to analyse headings in a systematic way, but they are able to upload master templates to ensure that they are improving subject terminology on a smaller scale.

Conclusion

Our subject headings project at the University of Bristol continues to be rewarding and challenging. Perhaps the most significant challenge has been how and where to start analysing such a major collection, and how to record and justify the changes we propose as we continue with our work. Other major considerations include staff capacity for the project, expertise in programs such as Excel and MarcEdit, and having a robust method for tracking changes and capturing the sources used to inform our decisions. It is encouraging to discover, so far at least, that relatively few headings need attention, but this does not detract from the importance of this work. We would be very keen indeed to hear from colleagues at other institutions who have undertaken similar projects or who are considering similar processes.

Acknowledgements

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Forming an anti-racist and inclusive library catalogue at Cardiff University

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ABSTRACT

Details of a HEFCW (Higher Education Funding Council for Wales) funded project to create an anti-racist and inclusive library catalogue at Cardiff University. A project cataloguer was employed to assess the extent of problematic subject headings within the library catalogue. After researching the issue and identifying outdated and harmful terminology, remedial solutions and recommendations were proposed and then implemented. This article describes the processes undertaken throughout the project, including the removal or replacement of inappropriate headings (LCSH and MeSH).

Introduction: How the Project Came About

The library catalogue is a crucial tool for users of the library – enabling discovery of, and access to, the physical and online collections and information resources which support teaching, learning and research. Using the catalogue is part of the overall experience of using the library, which should be an inclusive experience that is welcoming to all users. Over recent years cataloguing staff at Cardiff University Library Services have become increasingly aware of the problems of language, representation and inclusivity within some Library of Congress Subject Headings (LCSH) and Medical Subject Headings (MeSH) used within the library catalogue. Concerns that had been highlighted, for instance, by the Dartmouth College Libraries in the 'Change the Subject' documentary (2019) about a group of Dartmouth students who challenged anti-immigrant language in the Library of Congress Subject Headings (Change the subject, 2019). These are common legacy issues for university libraries, where terminology has been used historically and may not have been updated to reflect

current understanding and awareness of race equity issues. At Cardiff we were uncertain to what extent problematic headings were used within the library catalogue and the potential harm they might be causing. However, we didn't feel we had the capacity to tackle this issue in a meaningful way alongside a business-as-usual workload.

In October 2022 it was announced that the Higher Education Funding Council for Wales (HEFCW) were providing funding to support race equality initiatives within the higher education sector in Wales. Cardiff University was looking for ideas for projects to take forward their priorities for progressing race equality and the Library Service was approached to see if they wanted to bid for any of the funding. A few ideas were raised including the concept of 'decolonising the catalogue' and the Cataloguing Team were asked if they wanted to formulate a bid. This needed to be done at fairly short notice but was achieved with the support of the University Librarian, Tracey Stanley. Out of the three bids submitted by the Library Service, two were successful, including the proposed cataloguing project to look at subject headings within the catalogue.

The funding we received enabled us to appoint a project cataloguer for six months part time. With hindsight we probably should have asked for a full-time post, but we were wary of bidding for too much funding (and being turned down), and we also had no real idea of the amount of work that would be entailed. After progressing through the recruitment process, we appointed Mouse Miller, who started in post in June 2023. Although we had some ideas about what we wanted the project to cover we were also very open to what the successful candidate would bring to the position.

Project Aims

The initial weeks focused on defining the scope of the project and what we thought was achievable within the time frame allocated. Addressing the issue of racist and/or otherwise prejudiced language in subject headings naturally involves conversations on broad, complex and challenging concepts, so it was important to concentrate our efforts on making a measurable difference to our catalogue with the resources we had available. We determined the study's purpose was to firstly conduct a scoping exercise to define the extent of problems in Cardiff University's library catalogue re. language, representation, and inclusivity issues within subject headings. The next step was to identify solutions and recommend remedial actions to move towards more inclusive representation within the catalogue, which would include:

- Identification and deletion of inappropriate LCSH & MeSH.
- Enhancing records with alternative subject headings, including the identification/agreement of alternative headings.
- Written documentation and guidance for the Cataloguing team to ensure the use of inclusive alternative subject headings becomes business as usual.

The project was conducted in four key stages: researching existing relevant projects and publications, locating harmful subject headings in the catalogue, identifying solutions and then implementing the proposed remedial actions in a sustainable way.

Stage 1: Research

The project would not have been possible without the extensive work already undergone in the sector to combat the limitations of, and harm caused by, controlled vocabularies. Consulting contemporary critical cataloguing scholarship, collective cataloguing resources and relevant case studies, the research stage of the project focused predominantly on exploring approaches to combat the limitations of, and harm caused by, controlled vocabularies such as LCSH and MeSH. This was in addition to wider questions of cataloguing ethics and the use of appropriate, inclusive language to describe marginalised peoples.

The study also conducted research into existing projects operated by other University libraries aiming to redress these issues; exploring the current strategies and practices of similar institutions which Cardiff University Library could potentially adapt for its own purposes. Particular attention was paid to cases where the institution used the same Library Management System as Cardiff University (Alma by Ex-Libris). Our study reviewed sources published within the last 5 years to ensure the findings reflected contemporary understanding of the topic, plus current methods and technology available to approach the problem.

Research - Outdated & Harmful Terminology

Our research primarily helped us gain an understanding of harmful terminology used to describe marginalised peoples and examples of harmful subject headings in LCSH and MeSH. The two significant issues identified were:

- Demonstrable bias ingrained within the hierarchical structure of controlled vocabularies (most notably LCSH).
- Subject headings that contain offensive and outdated terminology.

However, we quickly decided to only research approaches to mitigate the latter. The resources consulted that address structural bias in LCSH explain the issue but unanimously state that, because the problem is so inherently interwoven into its organisational framework, the only effective solution would be to overhaul or replace the vocabulary entirely. As the development of a new vocabulary as comprehensive as LCSH was far beyond the scope of this project, no further research on this potential action was conducted.

There were however numerous resources detailing examples of LCSH and MeSH containing offensive and outdated terminology, most notably; CataloguingLab's Problem LCSH (Fox, 2025 a) and Medical Subject Funnel (Fox, 2025 b) and the Inclusive Terminology Glossary created by Carissa Chew (National Library of Scotland, 2023) in

collaboration with the National Library of Scotland as part of the Inclusive Terminology Project[1]; as well as a glossary of terms used to describe different marginalised groups, including notes on the history, nuances and implications of the terminology and also notes authorised LCSH containing any harmful terminology, welcomes proposed additions and is actively updated (Cultural Heritage Terminology Network, 2021).

Of the noted resources, the Inclusive Terminology Glossary was found to be the most comprehensive and contemporary source on harmful language available, demonstrating notable research into the terminology listed. This facilitated a more holistic understanding of language both offensive and appropriate to a wide spectrum of marginalised communities at present, offering the largest compilation of terms which could be searched within the catalogue later during the project's scoping exercise. Although its focus is not subject headings within controlled vocabularies, the Glossary was found to contain the harmful language within the subject headings compiled in CataloguingLab's collective cataloguing resources when cross-referenced.

Guiding principles

More so than defining how to address harmful subject headings in the library catalogue, the majority of resources consulted placed emphasis on ethical values to guide and inform approaches to the issue. Multiple resources for example recommended following the principles and values listed in the Code of Ethics for Cataloguers (Cataloguing Ethics Steering Committee, 2021); an interpretive framework intended for use by cataloguers to inform their decision-making in accordance with best ethical practice.

Similar suggestions included creating one's own internal cataloguing policies and/or guidelines for inclusive description to ensure conscientious cataloguing practices are integrated into everyday practice. High importance was also placed on guaranteeing cataloguing staff receive suitable training and support in inclusive metadata practices. This has been the approach of organisations such as Harvard Center for the History of Medicine (Lellman, 2023), the University of North Carolina at Chapel Hill (Alston et al, 2022) and Auckland War Memorial Museum (Whittaker, 2020).

The key principles recurring throughout the review were found to be:

- Maintaining awareness of and actively opposing the use of offensive and outdated terminology in subject headings.
- Using the most specific, current and accurate terminology available to describe the identity of an individual or group: centring their voices above the "curatorial" voice.
- Demonstrating accountability and being transparent in one's values, actions and shortcomings.

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[1] The glossary has now also been made available as a wiki and renamed as the "Chew Inclusive Terminology Glossary" (National Library of Scotland, 2023).

Centring marginalised voices by prioritising how they wish to describe themselves was noted recurrently; in addition to identifying harmful language prevalent in controlled vocabularies, the literature notably highlighted community input to determine the appropriate terminology to use in its place. Numerous inclusive language guides and specialist glossaries created by and/or pertaining to a specific marginalised community were promoted as vital resources to understand what terms are current and preferred by the group in question. Many sources further suggested that institutions adopt a glossary of discriminatory/preferred terminology, or establish their own based on inclusive language resources, for internal staff use. The British Library for example has implemented this strategy as part of their Anti-Racism Project (Danskin, 2023).

Encouraging user feedback through strategies such as conducting user surveys was similarly noted, with the aim to facilitate an ongoing open dialogue between cataloguers and end-users. Some institutions such as Princeton University Library Archives and Manitoba University Library have utilised features in their catalogue interfaces such as in-built forms or item-level "Suggest a Correction" buttons that encourage users to report harmful material. Staff at Princeton note that this not only enables community input, providing a mechanism to alert staff to problematic description, but demonstrates accountability by ensuring "our description is assessed by outside communities without putting an uncompensated burden on those communities to do our work for us" (Bolding, 2018).

Further strategies to engage users with the issue and acknowledge institutional responsibility were present throughout the literature, with an emphasis on communicating practices, policies and cataloguing decisions in a transparent manner. The most prevalent option several libraries and archives have chosen to communicate their aims is via an official published policy, or institutional statement on harmful language, published on their website homepages, news or blog features, collections information pages, and/or social media channels. The Digital Public Library of America likewise includes a link to their Statement on Potentially Harmful Content at the top of their catalogue search page, whilst the University of Georgia Libraries note their statement in their catalogue footer. The Australian Institute of Aboriginal and Torres Strait Islander Studies (AIATSIS)'s "Sensitivity message" on the other hand appears as a pop-up when users first open their library catalogue, which users must read and close before browsing resources.

In addition to recognising the issue of bias and offensive language in the library catalogue, whilst acknowledging responsibility for acting on these problems, some institutions have also opted to communicate their linguistic decisions by including the glossary of discriminatory/preferred terminology they use in their statements. Inclusion of an email address for the statement's author and/or team responsible may also further support transparency in the process and simultaneously provide an additional route for users to report harmful material.

Adapting existing LCSH & MeSH

The primary action suggested throughout the literature was the rejection of subject headings in controlled vocabularies that contain harmful terminology. It is acknowledged that, despite the issues, the benefits of employing two of the most widely used controlled vocabularies (LCSH and MeSH) are indisputable. With headings encompassing the majority of subjects in a general library collection, their comprehensive nature is applicable for most resources, and their extensive usage globally improves the interoperability, accessibility, and discoverability of records cross-institutionally. As LCSH and MeSH are created and updated consistently by external bodies and fully supported by modern library management systems such as Alma, they are also highly convenient options that often require no maintenance from library staff. To retain the benefits of using LCSH and MeSH, some libraries have opted to still use these vocabularies but use or adapt alternative headings in the place of headings deemed problematic.

For example, before the LCSH "Slaves" was updated to "Enslaved persons" in 2023, UCLA Library chose to substitute the heading with the existing heading "Slavery". Similarly, the LSCH "Slaveholders" could be substituted with the broader term "Enslavers" (Biswas and Hallyburton, 2020). The Canadian Research Knowledge Network has likewise utilised subdivisions to replace the LCSH "Indians of North America" with "Indigenous peoples" followed by "North America" as a geographical sub-division.

It must be noted however that substituting subject headings with existing alternatives within the same controlled vocabulary may result in less accurate subject description.

Further examples of adapting existing LCSH and/or MeSH are as follows:

A: Using authorised headings from other thesauri (LSCH or MESH)

Authorised term		Authorised term (other vocabulary)	
"Battered Women"	MeSH	$a Abused women	LCSH
"Illegal immigration"	LCSH	$a Undocumented immigrants	MeSH

B: Using subdivisions

LCSH	LCSH subdivision
"Education of mentally retarded"	$a People with mental disabilities $x Education
"Aboriginal Australians"	$a Indigenous peoples $z Australia

C: Using broader/less specific terms

Authorised term		Broader/less specific term	
"Mental Retardation, X-Linked"	MeSH	$a Intellectual disability

AND

$a X chromosome - Abnormalities | 2 LCSH terms |
| "X-linked mental retardation" | LCSH | | |
| "Slaveholders" | LCSH | $a Enslavers | LCSH broader term |

Local subject headings

An alternative option to using critiqued LCSH and MeSH includes implementing local subject headings as replacements; employed by other higher education institutions such as the University of Colorado Boulder Libraries (López and Wright, 2018) and SUNY (SUNY (State University of New York) Office of Library and Information Services, 2023), the creation of local subject headings allows the cataloguer full control over the terminology used without the constraints of an existing controlled vocabulary. However, very few sources commented on the actions needed to employ local subject headings effectively, and there are several limitations to this approach. Agreement of terminology, potential migration issues during technological updates, plus the time and maintenance required in-house to upkeep authority files for local headings and corresponding documentation must be considered.

Alternative vocabularies

Where no appropriate heading exists within more widely used controlled vocabularies such as LCSH, a number of sources recommended employing terms from alternative specialist thesauri. The Cooperative Computer Services Public Library Consortium in Illinois for example uses the thesaurus Homosaurus: an international LGBTQ linked data vocabulary to create additional access points for subjects not encompassed by LCSH alone- e.g., the Homosaurus subject heading "Pansexual people", which has no equivalent in LCSH (Fischer, 2023).

```
650 _7 $a Pansexual people $2homoit
```

Numerous alternative vocabularies centring the experiences of, and terminology used by, marginalised communities have been developed to provide more accurate subject description to the records assigned them. Some examples of these thesauri include the following, which are recognised sources each assigned with an individual source code ($2) for use in OCLC records (and local records, LMS settings permitted).

Vocabulary	$2 Source code
African Studies thesaurus (ASC Leiden)	ascl
AIATSIS Subject Thesaurus	aiatsiss
AFS Ethnographic Thesaurus - The American Folklore Society	afset
Chicano Thesaurus	cht
First Nations Metis and Inuit Indigenous Ontology	fnhl
Gender, Sex, and Sexual Orientation (GSSO) ontology	gsso
Homosaurus: an international LGBTQ linked data vocabulary	homoit
Ngā Ūpoko Tukutuku = Māori Subject Headings	reo

However, these vocabularies are primarily intended to supplement other controlled vocabularies, not replace them, and there are currently no marginalised community-centred thesauri supported as Authorised Vocabularies in Alma. To employ these headings as a controlled vocabulary, the library must create and maintain corresponding local authority files; presenting the same aforementioned issues faced by utilising local subject headings.

Methods of amending subject headings

Despite ample discussion of LCSH and MeSH and their potential alternatives, significantly fewer publications discussed the process of replacing these subject headings; particularly within a large library catalogue where locating and amending harmful terminology may be more challenging.

The State University of New York (SUNY)'s "Change the Subject Project" (SUNY (State University of New York) Office of Library and Information Services, 2023) proved the most useful resource detailing step-by-step methods of how the library replaced selected subject headings with alternatives; namely through running normalization rules in Alma and display normalization rules in PrimoVE Display.

Written in a specific syntax, normalization rules can be created to implement specific changes to bibliographic records; either individually or to a set of records via running a manual job in Alma. Normalization rules can be used to add, delete or edit fields and can be done conditionally, based on a defined condition that does or does not take place in the bibliographic record. SUNY for example uses normalization rules to replace specified LCSH with their devised local headings, allowing bulk changes to multiple records simultaneously.

Display normalization rules in PrimoVE Display control and/or change the way specified metadata is seen by catalogue users, as opposed to changing metadata in the bibliographic records themselves. For instance, a display normalization rule can be written to change the display of the subject heading "Fugitive slaves" to "Fugitive

enslaved persons", mapping the specified problematic term to a chosen alternative, without changing the subject heading in the record itself.

Altering the public display layer of the library catalogue could be an effective strategy to address harmful subject headings where no suitable and/or accurate alternative exists; maintaining a heading's connection to its wider vocabulary whilst having full control over the terminology used. Although this method does not resolve the issue of inappropriate subject headings within the catalogue, as the original heading appears unchanged to Alma users, preventing the end user from encountering offensive terminology does reduce potential harm. This approach has been recommended by similar investigations into the issue, such as the Report of the SAC Working Group on Alternatives to LCSH "Illegal aliens" (Fox et al, 2020).

The adaptability and repeatability of running normalization rules in Alma and PrimoVE Display can also be considered a significant advantage, particularly as the ever-changing nature of language may necessitate ongoing revision to records to ensure that terminology in use reflects current understanding.

Stage 2: Scoping and locating problematic subject headings

Following on from the research aspect of the project a scoping exercise was held to locate harmful subject headings within the University library catalogue and determine the scale of the issue, this also included a structured group discussion with the ULS cataloguing team to develop a strong understanding of their workflows and practices.

The scoping exercise was conducted with the aim to determine if subject headings containing incorrect and offensive terminology were in use in the library catalogue (it was fully expected that they were), and if so, what these inappropriate headings were. We also needed to determine the source of the headings – be it LCSH, MeSH, local or undetermined, and the extent to which the catalogue was affected. Just how many records and headings would we be dealing with; what was the scale of the problem?

Search terms located

The search terms of the scoping exercise were directly informed by the Inclusive Terminology Project as noted above. The terminology listed is divided by marginalised group, however some terms appear on multiple occasions if used to describe multiple communities; for example, the term "savages" has been used as a highly offensive, derogatory term to describe African Americans, Native Americans and many groups of Indigenous Peoples, so appeared more than once throughout the Glossary.

The number of terms per marginalised community noted within the Inclusive Terminology Glossary (as of July 2023) are as follows. The total number of terms totalled 2752 which, after excluding duplicate and inoffensive terms, brought the number of terms searched for as part of the scoping exercise to 1897.

| Search terms (informed by Inclusive Terminology Glossary)	
African American History & the Atlantic Slave Trade	212
Native American History	84
Indigenous Peoples of Canada, Greenland, Siberia, and the Russian Far East	74
Aboriginal Peoples of Lands Now Known as Australia & Aotearoa (New Zealand)	110
History of Hawai'i and Native Hawaiians	67
Empires and Imperialism	361
Travelling Communities: Gypsy, Roma, and Traveller	144
Contemporary Slurs	220
Disability and Mental Health History	368
LGBTQIA+ History	655
Women's History	96
History of Masculinity	31
History of Antisemitism	68
Sectarianism in Scotland	32
Working Class History	168
Locations & Place Names	62
Total number of terms	2752
Duplicates (terms found in multiple categories) & Inoffensive Terms	855
Total Search Terms	**1897**
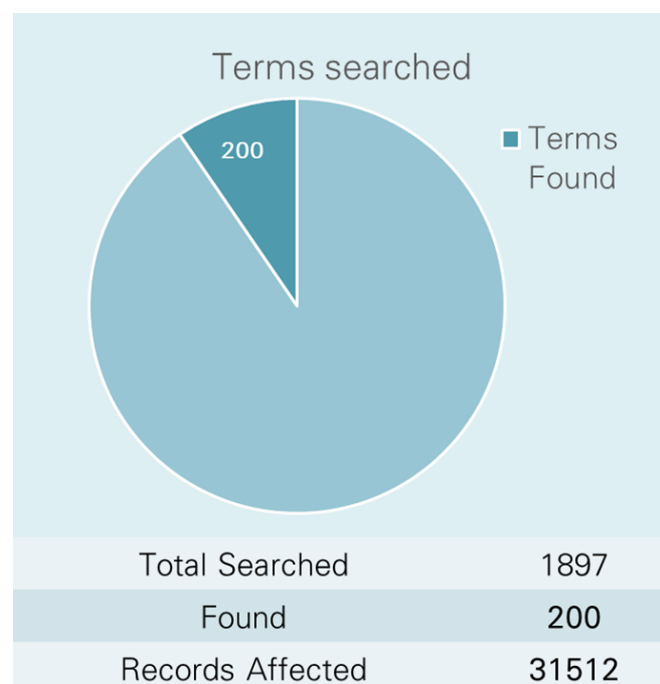
Figure 1: Scoping results

From the 1897 terms searched using the Subject Search report (detailed below), 200 (approx. 10.5 %) of those terms appeared within subject headings currently in use in the library catalogue, affecting a total of 31,512 records (see Figure 1).

Initial methods to conduct machine-assisted keyword searches for inappropriate terminology utilised existing tools within Alma; searching via Advanced Search by "Subject" and via the Browse Bibliographic Headings tool available within the Resources > Cataloguing menu. However, these methods had significant limitations.

Although using Advanced Search by "Subject" to locate inappropriate terminology successfully retrieved records containing the search term, it did not search the Subject MARC 6XX fields exclusively. Consequently, the search results included many records where the search term appeared in bibliographic or notes fields (e.g. MARC 245 Title or MARC 5XX Notes) as opposed to subject fields (MARC 6XX), and thus not relevant for the purposes of this study.

Searching via Browse Bibliographic Headings searches within one of the controlled vocabularies supported by Alma (e.g. LCSH) and successfully retrieves any bibliographic records that include the term in its subject fields. However, this tool cannot browse vocabularies not supported by Alma (such as local headings) or instances where a subject headings' source is not specified, which neglects many older records in the University's catalogue.

Both search methods also included deleted records and community zone records in their search results. As inactive records and records that Cardiff University does not have executive control over have been excluded from this study, the search methods consequently retrieved many irrelevant results.

With no appropriate tools readily available in Alma, the Systems team at Cardiff University devised a customised report to retrieve all records (relevant to the needs of the study)- assigned with subject headings containing the search term entered. Made available via the CU – Cataloguing Dashboard in Alma Analytics, the Subject Headings Report can be run at any time by staff with CU – Cataloguing access[2].

The Subject Search Report only retrieves records that are active, not linked to the community zone and contain the search term in MARC 650 (Subject Heading) fields, regardless of the vocabulary source (e.g. LCSH, MeSH, local or undetermined). The report results detail:

- Key bibliographic information (Title, author and publisher)
- Record MMS ID
- All subject headings applied to each record (including headings that do not contain the search term)
- Number of active titles per record

[2] See accompanying article by Stallard, Pierce & Miller (2025) for further details about this report.

Following identification of any search terms located within subject headings currently in use in the library catalogue, the report results were subsequently reviewed to determine how many records each term affected and ascertain the context of each term. This was necessary in many cases, as several of the search terms were appropriate in some contexts but inappropriate in others (e.g., the term "exotic" is applicable when describing fauna and flora, but highly inappropriate to describe people of colour). It was decided that only terms which could be confirmed as harmful (regardless of context or if found in an inappropriate context) would be actioned within the scope of the project due to time constraints and available resources.

The context analysis was conducted using additional bibliographic data from the report results, such as the resources' title or other assigned subject headings, to determine the context of the term searched (and subsequent appropriateness for use). Terms found in an appropriate context, or that required further information to determine their context, were excluded from the final list of terms/records affected to be actioned within the project.

The report results of the remaining terms found to be definitively inappropriate were reviewed again to determine which subject headings containing the search term were in use, how many of these headings there were, plus the number of instances each heading was used.

The Subject Search report was a highly effective method of identifying which and how many records contain inappropriate subject headings. However, determining the number of subject headings containing the search term, plus the number of instances each heading was used, proved more difficult as the report condensed all the headings applied to a record into one cell. With up to hundreds of records retrieved per search term, determining each subject heading variant and number of appearances without being able to easily filter the results was highly challenging. The Systems team subsequently created an additional report which delimits the subject headings assigned to each bibliographic record into separate columns; the separation of data into different cells easing the process of identifying the different variants of the search term/subject headings in use.

Where the search term(s) to be actioned within the project retrieved a significant number of results (>10 records), the term was searched again via the Delimited Report. The Delimited Report results were subsequently downloaded into Excel, where the data was manipulated to determine every subject heading variant that contained the search term and the number of records each heading affected.

Review of found terms

The review findings concluded that action was required for 50% (100) of the terms located, substantially reducing the number of records considered for editing from 31,512 to 8235.

The majority of the terms considered harmful/to be amended were inappropriate in any context, including "Blacks" (Black people), "Negroes" (Black people) and "Slaves" (Enslaved persons). 50% (100) of the terms located were excluded from actioning within the project due to either:

- Their context being appropriate (i.e., not harmful or offensive to a community) (24).
- A lack of information required to determine an appropriate action (76).
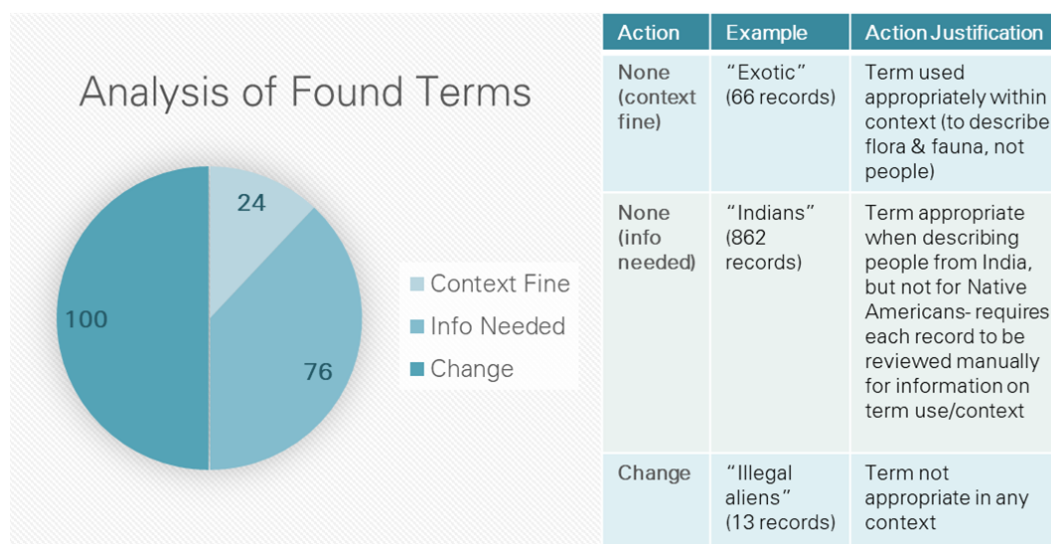

Action	Example	Action Justification
None (context fine)	"Exotic" (66 records)	Term used appropriately within context (to describe flora & fauna, not people)
None (info needed)	"Indians" (862 records)	Term appropriate when describing people from India, but not for Native Americans- requires each record to be reviewed manually for information on term use/context
Change	"Illegal aliens" (13 records)	Term not appropriate in any context

Figure 2: Analysis of found terms

After review, 24 of the 200 search terms identified were found to only appear in appropriate contexts and thus redacted from the list of terms to be actioned. For example, the word "exotic" was searched for as part of the scoping exercise due to its history of use by white people to Other and fetishise people of colour. "Exotic" was found in 66 records, but reviewing these records determined the term was used only within the subject heading "Exotic flora and fauna". The term "exotic" is inappropriate to describe people but applicable in this instance, so no action was required.

An appropriate action for 76 of the 200 search terms identified could not be determined because further information was needed. This was either due to the number of records the term appeared in being too large to review within the scope of this project, or because the resulting records did not contain enough information to determine the term's context.

"Indians" for example was searched for because the term has controversially been used as a homogenising label with colonialist roots for Native Americans (e.g. "Indians of North America", "American Indians" etc.). However, the term is appropriate when describing people from India, South Asia. Consequently, each record assigned a subject heading containing "Indians" must be reviewed individually to identify the term's use and context before determining an appropriate action. However, searching this term yielded a total of 862 results and there was unfortunately not enough time

available within the constraints of the project to review such a large quantity of records effectively; further investigation would be required at a later point.

"Talisman" was searched due to the term's often incorrect usage to exoticise artefacts from non-European cultures, identifying 4 records for review. However, the accompanying data included in the report results used to identify the resources' subject (title and other assigned subject headings) were not sufficient to determine if the term was being used appropriately. Further review of each record individually within Alma and potentially consulting each resource itself would be required to determine the context the term was found in, which fell outside the project's capacity due to the time and resources available.

The 100 terms confirmed for further investigation/action were searched again via the Subject Search Delimited report, to determine every subject heading and/or subject strings containing each term currently in use.

Stage 3: Identifying solutions and recommendations

Findings from the selected publications and existing projects, as well as the results of the scoping exercise, were then used to propose recommended remedial actions appropriate to the needs of and resources available to ULS' cataloguing team. These were presented in a final project report that was submitted not only to the cataloguing team but to the library Senior Management Team for approval.

Stage 4: Implementing the proposed remedial actions in a sustainable way.

After identifying the problematic terms contained within the library catalogue, and how many bibliographic records this affected a number of recommendations were presented to deal with the problem. Primarily we needed to determine alternatives to the outdated subject headings using authorised LCSH and/or MeSH, as had been suggested in the literature. Agreed alternatives were compiled into a department Glossary of 'discriminator/preferred' terminology that the cataloguing team could refer to and adapt going forward. These terms were then used to update the problematic headings. This was done by utilising normalization rules to make bulk changes to the majority of problem headings, as has been detailed in the accompanying article by Stallard, Pierce & Miller (2025), followed by manually editing the remaining records.

For those headings where no suitable alternative LCSH or MeSH was available we altered Primo Display settings via display normalization rules as discussed above and also detailed in the accompanying article (Stallard, Pierce & Miller, 2025).

As language consistently evolves and changes, issues concerning terminology, representation and inclusivity will always be present in our efforts to label individuals and communities. There is not, nor ever will be, a conclusive resolution. However, actively acknowledging the problem and acting with sensitivity, with the resources and

knowledge available to us, is the most effective step towards an inclusive, anti-racist library catalogue.

To ensure that the project wasn't just a static action, monthly language sensitivity reviews were established via an automated monthly report that searches for outdated terminology in subject heading fields of active records not linked to the community zone, which have been edited or imported within the last month. The report results, and identified records, are emailed to the cataloguing team inbox to be actioned accordingly by utilising the department Glossary. In addition, an annual language sensitivity review has been set as a cataloguing team annual task, whereby the team reviews the Inclusive Terminology Glossary, LCSH and MeSH updates for the past 12 months and ensures language sensitivity practices are amended accordingly.

Some further, long-term recommendations were also included in the project report, namely that the Cataloguing team should attempt to fulfil the following actions:

- Create and implement a descriptive and interpretive practice policy regarding conscientious cataloguing informed by the Cataloguers' Code of Ethics for the cataloguing team, as a framework to guide decision-making.
- Create and publish a statement on harmful language on the library website to acknowledge the issue of problematic language within the library catalogue and how it is being actively addressed. Add a link to this statement at item-level on Primo.
- Encourage users to report harmful material by adding an item-level "Suggest a Correction"/"Harmful Language Feedback" button/form to Primo, which emails any form submissions directly to the cataloguing team.
- Contest inappropriate LCSH and MeSH directly (e.g. via Subject Authority Cooperative (SACO) Program or CataloguingLab) to actively address the issue of harmful terminology in subject headings at its source.
- Compile guidance for internal use by the team around cataloguing ethics and inclusive language, and undertake training in the processes recommended from this project.

Challenges / learning points

The key challenge of this project was undoubtedly the lack of information available detailing how to locate inappropriate subject headings and terminology within bibliographic records. Although an extensive amount of sources recommended the boycott of biased and/or offensive subject headings, taking action to amend records containing these headings retrospectively, little information was available on how to initially identify and retrieve records affected by these issues.

Similarly, there was a significant lack of existing projects exploring how to effectively replace specified subject headings with defined alternatives. Despite ample discussion of what headings should be changed and what terminology should replace them, few

sources discussed how to achieve this. This was particularly challenging considering the scale of Cardiff's library catalogue, as manually editing records individually would be highly time-consuming. Although case studies such as SUNY's Change the Subject Project helpfully noted the normalization rules they employed in Alma and PrimoVE Display, this project considered a significantly larger set of subject headings and required more complex changes.

Subsequently, developing and testing effective methods to conduct the scoping exercise and large-scale amendments to subject headings required more time than initially anticipated.

We were very aware that language changes rapidly over time, meaning that this issue will likely never be resolved, so there was the need to create processes that can be easily repeated/followed/adapted over time. We also wanted to automate processes as much as possible to reduce workload, and to ensure that going forward detailed documentation and guidance for the cataloguing team was available.

(Post)-Implementation Actions and Conclusions

Mouse left at the end of January 2024 having accomplished a huge amount for the project – really demonstrating what can be achieved when you have dedicated staff time. Alongside Vicky they had ensured that all the identified changes had been made in the catalogue and the monthly report set up to run, although they left before the first monthly report was produced. As a team left without our project cataloguer we felt a bit bereft, knowing that it was now up to us to keep the momentum going. The first monthly report was larger than expected, although in retrospect completely manageable. Despite all of Mouse's extensive documentation people felt unsure of how we were to tackle this alongside our normal work. Having overseen the project Karen was in position to manage expectations and reassure colleagues about how the work could be achieved. This initially entailed writing a very basic set of instructions for everyone to follow, pointing them to Mouse's guidance in various places, but essentially a step by step walk through of what needed to be done. The list was split between team members to work through, then we met to discuss any headings that had caused problems. Most queries we managed to resolve amongst ourselves, but there were a few where we felt we didn't have the wider understanding about what the preferred term should be. This highlighted the need for further training and awareness, and the gap we felt without our resident expert.

Subsequent lists have been shorter and contained a varying proportion of items that were dealt with the previous month because we add a 997 note to indicate that headings have been updated or reviewed. The addition of the note means that the record has been amended and is thus potentially flagged the following month if the trigger term is still contained within the headings. For example, 'Blacksmith' is flagged because it contains 'Blacks' within its structure. This will not be changed and so will recur the following month as the addition of the 997 note has amended the record. The

monthly lists have now been happily absorbed into business as usual, with any problems being discussed at our monthly team meetings.

For the post project recommendations, at the time of writing we are just about to embark on the annual review, with some trepidation regarding workload without a dedicated staff member to lead the way. We are aware that if this is to be done thoroughly and meaningfully it will take considerable time to complete. As the department has also just been involved in a move to a different physical location we are still dealing with the upheaval, and the adaptation of altered working patterns.

The Statement on Harmful Language was added to our library webpages in October 2024, with a link from Library Search (Primo) added a few weeks later. The text was predominantly written by Mouse but needed to be discussed and approved by the Library's EDI group (of which Karen is a member), and the Senior Management Team. Discussions were also held about where best to place the text, both on the webpages and on the library catalogue. The text was then also translated into Welsh. We know that many library services across the country are adding these statements to their webpages or catalogues and were thus pleased that we had also achieved this. We will be entering into discussions with other WHELF (Welsh Higher Education Libraries Forum) institutions to see if we can either add a WHELF-wide statement at some point in the future or ensure that all WHELF institutions have their own statement (some already do). We are also hoping at a later date to add an item level "Suggest a Correction"/"Harmful Language Feedback" form to the library catalogue, as per Mouse's recommendation, enabling users to more easily and directly respond to the language they encounter.

A more informal recommendation was that where possible we would share the work that had been achieved. In the initial stages of the project we discovered there was a lot of information about what issues were with outdated subject headings and why the problems should be addressed (as noted above) but less literature on the practical ways to take remedial action. This has begun to change over the last twelve months, not least as evidenced by this issue of C&I, and the various books reviewed within it, and we wanted very much to be part of the conversation and hopefully have others benefit from our work. In addition to this current article the three of us, in various iterations, have given talks and presentations to a number of different interested parties across the UK and Ireland.

Having a dedicated (albeit temporary) staff member was crucial for us in getting this work started, and we now have to ensure that we embed this good practice into our daily workflows. The monthly reports take up little time, the analytics reports and normalization rules can be fairly easily amended to accommodate changes and updates, and LCSH and MeSH are making regular improvements which automatically update in our LMS. It should be noted that although the project was framed around being 'anti-racist' in our catalogue, other protected characteristics were not ignored; in fact no differentiation was made, the approach was for inclusivity across the board.

All in all this is a deeply complex and ongoing issue that must be addressed with both ethical and practical approaches in mind, requiring further actions which balance:

- Proactive opposition to use of harmful language
- Centring marginalised voices
- Demonstrating our actions transparently
- Maintaining record quality and discoverability (ensuring subject access to facilitate access and promote discovery)
- Repeatability and adaptability going forward
- Effectiveness within the time & resources available

Inclusive cataloguing and metadata work must become the norm.

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Metadata &
Discovery
Group

The technical side to forming an anti-racist and inclusive library catalogue at Cardiff University

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ABSTRACT

As part of a project to create an anti-racist and inclusive library catalogue, records containing outdated and harmful terminology in the subject headings were identified. This article describes the technical work which supported the identification of the records and the solutions used to remove, replace or remediate the headings.

Introduction

The project to create an anti-racist and inclusive library catalogue at Cardiff University has been written about in detail in the accompanying article by Miller, Pierce & Stallard (2025). Funding from the Higher Education Funding Council for Wales (HEFCW) to support race equality initiatives was awarded to the library service and resulted in a six-month cataloguing post to scope out the scale of harmful terminology contained in subject headings within the library catalogue. Recommendations to address the problem were devised, and a plan for implementation put in place. Identification of problematic terms, replacement of terms with more appropriate language, and the bulk manipulation of data within our library management system involved Analytics reports and the creation of normalization rules. It was deemed more useful for potential interested readers to separate out the technical sides of the project and detail them in a distinct article which could be referred to for practical as well as theoretical purposes.

Cardiff University uses Alma library management system (Ex Libris) and we are fortunate to have a Premium Sandbox environment alongside our Production

environment. This allows us to do rigorous testing in the Sandbox before doing anything to our live data.

After initial discussions with Mouse Miller (project cataloguer) about what information and processes would be required to meet the aims of the project, the library systems team checked the existing scheduled jobs in Alma to see if any were relevant. There was a daily scheduled job running (*Authorities - Preferred Term Correction*) which performs preferred term correction on all bibliographic records that are linked to authority records, including terms in the 650 field (ExLibris, 2025 a). However, the job does not pick up records with outdated subject headings which had been migrated from our previous library management system (Voyager) in August 2016. Only records which had been subsequently edited or added since that migration would be picked up in the scheduled job. This meant we had lots of records to manually update with preferred terms.

Analytics reports

Our library systems colleague, Bronwen Blatchford, created an Alma Analytics dashboard (ExLibris, 2025 b) for Mouse to use to identify records containing subject headings which were outdated. Alma Analytics is built on Oracle Business Enterprise Edition (OBIEE) and is split into 'subject areas'. All the reports mentioned in this article were created in the Titles subject area in Analytics. Analytics is only available in our

Subjects search
Searches following fields: 6XX excluding 69X, 630, 689

Subjects [ ]

OK Reset ▼
Refresh

Title subjects search - case insensitive - no title details
Searches following fields: 6XX excluding 69X, 630, 689

Subjects [ ]

OK Reset ▼
Refresh

Subjects (Names) search
Searches following fields:

600 a,b,c,d,e,l,t.u
610 a,b,c,d,e,l,n,t,u
611 a,b,c,d,e,j,l,n,q,t,u

Subjects (Names) [ ]

OK Reset ▼
Refresh

Subjects (Names) search - no title data
Searches following fields:

600 a,b,c,d,e,l,t.u
610 a,b,c,d,e,l,n,t,u
611 a,b,c,d,e,j,l,n,q,t,u

Subjects (Names) [ ]

OK Reset ▼
Refresh

Subjects search
This report shows subject headings in separate columns (up to 20 headings) with MMS ID.
Subject names are not included.

Subject [ ]

OK Reset ▼
Refresh

production Alma environment and data is loaded every night – this means the reports are showing the data from the previous day's activities.

It should be noted that there are limitations with Alma Analytics, including the inability to see information about the first and second indicators of the bibliographic records in reports. Analytics treats 'Subjects' as one field, which includes all 600 fields excluding 69X, 630, 689. There is a separate Subject (Names) field which includes 600, 610 and 611 fields. The dashboard (screenshot below) was designed to allow searching in either area but there was/is a frustration that we couldn't be more specific and search only the 650 fields.

The dashboard prompts allow case insensitive searches of a term or terms which is/are contained anywhere in the 600 fields. The results filter out any records which are linked to the Community Zone (i.e. records which are not editable by Cardiff University cataloguers) and do not include records which are deleted. Each of the reports contains these same filters:
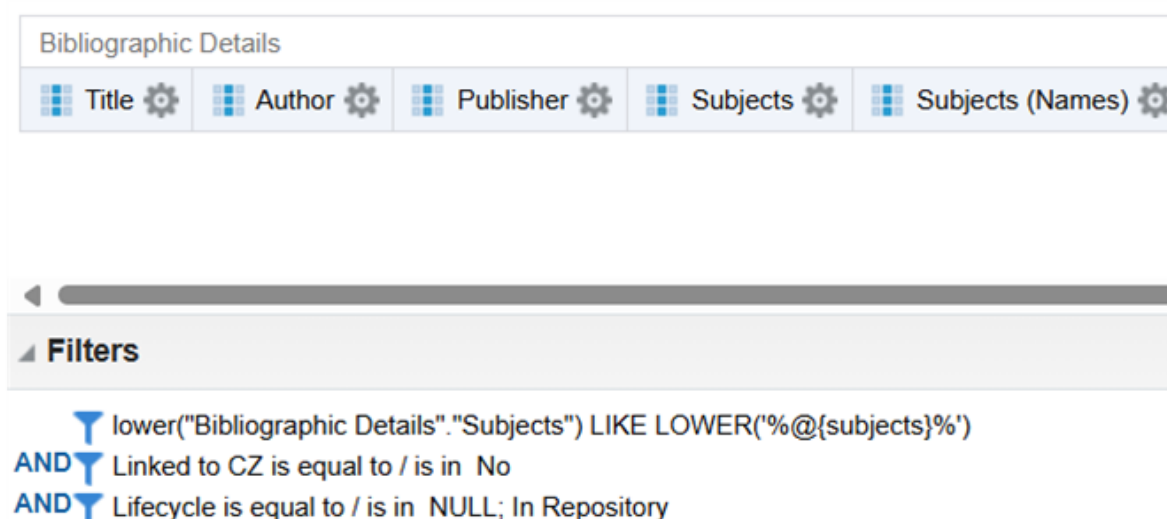
The final Subjects search report was added to the dashboard to show the subject headings in a more user-friendly way by delimiting up to 20 headings. Additional columns were added and the column formula changed to produce the delimited headings (instructions available at Kortick, 2016):

Edit Column Formula

Column Formula | Bins

Folder Heading Bibliographic Details

Column Heading Subject 1

☑ Custom Headings
☐ Contains HTML/JavaScript/CSS Markup

Aggregation Rule (Totals Row) Default (None) ▼

Available
Subject Areas 🔍

Column Formula
Evaluate('regexp_substr(%1,"[^\;]+", 1,1)',REPLACE("Bibliographic Details"."Subjects",';',';','\;'))

Titles - case insensitive - subject headings delimited

MMS Id	Subjects	Subject 1	Subject 2	Subject 3	Subject 4	Subject 5	Subject 6	Subject 7	Subject 8	Subject 9	Subject 10
99651653402420	African Americans; Afro-American women; Black politics; Civil rights; Race relations; Feminism; Politics; USA	African Americans	Afro-American women	Black politics	Civil rights	Race relations	Feminism	Politics	USA		
991701573402420	United States--Armed Forces--Afro-American soldiers.	United States--Armed Forces--Afro-American soldiers.									
992033233402420	X, Malcolm,--1925-1965.; Organization of Afro-American Unity.; African Americans.; Civil rights.; USA.	X, Malcolm,--1925-1965.	Organization of Afro-American Unity.	African Americans.	Civil rights.	USA.					

Return - Refresh - Export - Create Bookmark Link

Mouse used the dashboard to identify records which contained headings that were in need of attention (see the accompanying article by Miller, Pierce & Stallard, 2025) and created sets of those records in Alma Sandbox. Sets are used to provide the records required for all sorts of manual and scheduled jobs in Alma. They can be private or public and are visible to Alma users who have the appropriate roles.

Mouse also created and shared a spreadsheet with the list of headings to be changed and what they were going to be changed to. Some of the changes were more complicated than others, e.g. replacing a Library of Congress Subject Heading (LCSH) with a Medical Subject Heading (MeSH) plus a second 650 field, or replacing a $a subfield heading and adding a $z subfield as well. We had already discussed the options for how best to make changes based on the number of records that had been found. Where there were only a handful of records with a particular heading, those would be changed manually. For headings which occurred in lots of records, we agreed that normalization rules run specifically on the sets created by Mouse was our preferred option. We did look at other alternatives, such as exporting records and using MarcEdit, but we didn't have any previous experience with MarcEdit and decided to stick with a more familiar set-up.

Normalization rules

If you are a novice with normalization rules, as we all were at the start of the project, the Working with Normalization rules webpage (ExLibris 2025 c) is a great starting point. It gives clear information about what you can do with normalization rules, how to create and run them and lots of examples and links to other resources. The section on Normalization Rule Syntax was arguably the most important and was revisited throughout the course of the project.

The first rule we attempted was a simple example with a straightforward swap of one subject heading for an alternative subject heading. We found an example of a similar rule on the Ex Libris Knowledge page and started to test it in the metadata editor (MDE). By checking against bibliographic records which contained the outdated heading/s (which we accessed via the sets created earlier), we used the split-screen mode in the MDE to see if the rule worked and then make small iterative changes to reach the desired state. As mentioned already, the syntax of the rule is crucial and we discovered early on that a simple full stop at the end of a subject heading could make a real difference to whether the rule did or didn't behave in the expected way. For example, the rule below will replace any occurrence of the word Deaf in the 650$a subfield, including if it appears as part of a word e.g. Deafness:

```
rule "replace 650a Deaf with Deaf people"
when
(TRUE)
then
replaceContents "650.a.Deaf" with "Deaf people"
end
```


By re-reading the online help page, we found that you have to use four backslashes to match the period if it appears at the end of the subfield (*Wildcards and Special Characters* section in the *Working with Normalization Rules* documentation *(ExLibris, 2025 c)*).

```
replaceContents "650.a.Deaf\\\\." with "Deaf people"
```

LDR	00335cam#a2200133#i#4500
001	997252083402420
005	20250206151501.0
008	020213b#######ilua##########000#0#eng##
035	‡9 (Local)UWCM67245
035	‡a (WICaUW)725208-carddb
245 0 0	‡a JJ Téést title 3
509	‡a test note data
650 4	‡a Deaf.
650 4	‡a Deafness.

LDR	00335cam#a2200133#i#4500
001	997252083402420
005	20250206151501.0
008	020213b#######ilua##########000#0#eng##
035	‡9 (Local)UWCM67245
035	‡a (WICaUW)725208-carddb
245 0 0	‡a JJ Téést title 3
509	‡a test note data
650 4	‡a Deaf people
650 4	‡a Deafness.

Understanding the syntax allowed Vicky to work out what was needed in various scenarios. If we only wanted to change existing LCSH, part of the rule could ensure that only 650 fields containing a second indicator of 0 were included. If there were fields which contained an example of the heading with and without a full stop, then we could use a pipe to include both versions of the heading. In addition to the syntax, the order of actions in the rule will determine whether the rule works as you intended. There was a lot of trial and error!

Using the examples on the Ex Libris Knowledge Center page and in the Ex Libris Developers network (Kortick, 2024) we started to build a library of rules to apply to different sets. In our earlier discussions, Mouse and Vicky had decided to write rules for each heading or group of headings where the same action was required. We ended up with one rule for headings which were only a single heading being replaced, one rule for 'change heading and add x or z field', one rule for 'change heading and add new 650 _2 field' and so on.

Vicky reached out to the Alma user community via the mailing list[1] for help when trying to figure out some of the more complicated rules. The question asked was:

> I want to replace an outdated subject heading (650 $a Aboriginal Australians) with a different term ($a Indigenous peoples) and also add a sub-field ($z Australia.) when the $z doesn't already exist. Several records in the set I'm working on have additional $x and $z fields in the 650 fields (sometimes multiple x's or z's), as well as the $a heading which is being replaced.

> I've tried to write the rule in logical stages so the rule replaces the $a term, then adds the $z if it doesn't exist (there are a few more stages after this but I have questions at this point in the rule).

> I end up with records with two sub-fields followed by full stops if the '$z Australia.' sub-field is added.

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I did have another step in the rule to remove all full stops from v,x,y,z sub-fields but then I have the opposite problem with other records where there is no full stop on the final sub-field of the field if the $z Australia field isn't added.

Question: is there a way to make sure there is a full-stop in only the final sub-field of the field, regardless of whether it is sub-field v,x,y,z (and there may be multiple x or z's in the field as a whole)?

We got responses almost immediately, including the syntax which did exactly what we needed. Our original rule is shown here, alongside the final answer from the mailing list:

Vicky's original full rule

```
rule "replace 650a Aboriginal Australian with Indigenous peoples_temp"
#replace single term for LCSH or Undefined indicator with temporary
new heading (no full stop as will be followed by additional $z if
doesn't already exist)
priority 20
when
(TRUE)
then
replaceContents "650.a.Aboriginal Australians\\\\" with "Indigenous
peoples_temp" if (exists "650.{*,0}.a.Aboriginal Australians\\\\")
replaceContents "650.a.Aboriginal Australians\\\\" with "Indigenous
peoples_temp" if (exists "650.{*,4}.a.Aboriginal Australians\\\\")
end

rule "Replace single term in 650.a followed by x or z subfield"
#when sub-field a is followed by another sub-field, replace (plural)
$a term with temp new heading if 2nd indicator matches (LCSH here so
0)
priority 19
when
(((exists "650.{*,0}.a.Aboriginal Australians") OR (exists "650.
{*,4}.a.Aboriginal Australians")) AND ((exists "650.{*,*}.x.*") OR
```

```
(exists "650.{*,*}.z.*")))
then
replaceContents "650.a.Aboriginal Australians" with "Indigenous
peoples_temp"
end


rule "add subfield z to Indigenous peoples_temp"
#adds subfield z when it doesn't already exist
priority 17
when
not exists "650.z.Australia*"
then
addSubfield "650.z.Australia\\\\" if (exists "650.a.Indigenous
peoples_temp")
end


rule "Change second indicator of field 650 to _0 if values are
anything else"
#overwrites any existing indicators after term has been changed from
oldSH to newSH as above.
priority 16
when
(TRUE)
then
changeFirstIndicator "650" to " " if (exists "650.{*,*}.a.Indigenous
peoples_temp")
changeSecondIndicator "650" to "0" if (exists "650.{*,*}.a.Indigenous
peoples_temp")
end


rule "Replace temp subject heading with new subject heading"
#removes the _temp extension on all $a headings
priority 15
when
(TRUE)
then
replaceContents "650.a.Indigenous peoples_temp" with "Indigenous
peoples"
end


rule "remove duplicate 650 fields"
priority 14
when
(TRUE)
```

```
then
correctDuplicateFields "650"
end
```

Final version from the mailing list

```
rule "replace 650$a Aboriginal Australians with Indigenous peoples,
add $z Australia."
priority 20
    when
        (TRUE)
    then
        # replace Aboriginal Australians for LCSH or Undefined
indicator with a temporary term
        replaceContents "650.a.Aboriginal Australians" with
"Indigenous peoples_temp" if (exists "650.{*,0}.a.Aboriginal
Australians|Aboriginal Australians\\.")
        replaceContents "650.a.Aboriginal Australians" with
"Indigenous peoples_temp" if (exists "650.{*,4}.a.Aboriginal
Australians|Aboriginal Australians\\.")

        # If the heading already has $z Australia, it is done--change
temp heading to permanent heading
        replaceContents "650.a.Indigenous peoples_temp" with
"Indigenous peoples" if (exists "650.z.Australia*")

        # Now work on the remaining headings that don't have $z
Australia
        # Remove period from $a, $x, $y, $z so that a new subfield can
be added
        replaceContents "650.*.\\." with "_PER_" if (exists "650.
a.Indigenous peoples_temp*")
        replaceContents "650.*.(.*)_PER_$" with "$1" if (exists "650.
a.Indigenous peoples_temp*")
        replaceContents "650.*._PER_" with "."

        # Add $z Australia.
        addSubfield "650.z.Australia\\\\." if (exists "650.
a.Indigenous peoples_temp")

        # Change indicators
        changeFirstIndicator "650" to " " if (exists "650.a.Indigenous
peoples_temp")
        changeSecondIndicator "650" to "0" if (exists "650.
a.Indigenous peoples_temp")
```

```
        # Change temporary term to Indigenous peoples"
        replaceContents "650.a.Indigenous peoples_temp" with
"Indigenous peoples"

        correctDuplicateFields "650"
    end
```

A cataloguer in the US responded to Vicky's email to say that the order of sub-fields matters in the 650 field – this was useful information, and Vicky added a new step in some of the rules to flag where sub-field order may need manual checking after the bulk change:

```
rule "add 997 when term and sub-field exists"
priority 9
    when
        (((exists "650.a.Aboriginal Australians")) AND ((exists "650.
v.*") OR (exists "650.x.*") OR (exists "650.y.*") OR (exists "650.
z.*")))
        then
        addField "997.a.Check LCSH sub-field order ($a Indigenous
peoples $z Australia). DELETE THIS FIELD ONCE CHECKED"
    end
```

The syntax suggestions provided by the Alma community encouraged Vicky to improve the rules she had already written which made them all much shorter and tidier while still achieving the same result. It also made us realise that we needed a way to identify the records we had amended or reviewed as part of the project. Consequently, a step was included in **all** of the rules which added a 997 field to each record:

```
rule "add 997 for project when term exists so we know heading will be
updated"
priority 10
    when
        (exists "650.a.Aboriginal Australians")
        then
        addField "997.a.Subject headings updated as part of Race
Equality Project 2024"
    end
```

The 997 field is searchable in Alma which means cataloguers can check for records with any of the text above without having to wait for an Analytics report. We also included a rule to delete duplicates (correctDuplicateFields) of 650 and 997 fields at the

end of each rule in the event that more than one field was updated and the record had two instances of the exact same field.

The rules were now ready to run on the sets created by Mouse. In Alma, this meant creating a normalization process (Exlibris, 2025 d) and running the appropriate rule on each set. Here is a screenshot of the spreadsheet tracking the set name, subject heading, replacement heading/additional field and the rule to be used on the set:

Set	Subject Heading	Prior	R/M	No. of recor	2nd Indicat	REPLACE WITH
Afro	Afro-American authors	2	R	40	0	African American authors
	Afro-Americans	2	R	221	0	African Americans
	Afro-American Writers	2	R	19	0	African American authors
	Afro-American literature	2	R	21	0	|a American literature |x African American aut
Black	Blacks	1	R	154	0	Black people
Creole	Creoles	2	R/M	15	0	Racially mixed people
Ngro	Negroes	1	R	74	0	Black people
Slave	Slaves	1	R	62	0	Enslaved persons
	Slave labor	1	R	8	0	Slavery
	Slave Labour	1	R	4	0	Slavery
	Fugitive slaves	1	R/M	19		
Americanl	American Indians	1	R	21	0	|a Indigenous peoples |z North America
Eskimo	Eskimos	1	R	17	0	Arctic peoples
IndiansofNA	Indians of North America	1	R	334	0	|a Indigenous peoples |z North America
AAustralian	Aboriginal Australians	1	R	77	0	|a Indigenous peoples |z Australia
Aborigine	Aborigines	1	R	20	0	Indigenous peoples

2nd In	ADD ANOTHER 650 FIELD	Rule or rules to be used on set
		VS 650 SHAfro
		VS 650 SHAfro
		VS 650 SHAfro
thors		VS 650 SHAfro
		VS 650 single terms on multiple sets
2	|a Creole people	VS 650 SHCreole
		VS 650 single terms on multiple sets
		VS 650 SHSlave
		VS 650 SHSlave
		VS 650 SHSlave
0	|a Enslaved persons	VS 650 SHSlave
		VS 650 SHAmericanl IndiansofNA
		VS 650 single terms on multiple sets
		VS 650 SHAmericanl IndiansofNA
		VS 650 AAustralians replace $a and add $z when not exists
		VS 650 single terms on multiple sets

Potentially you could have all records in one big set and run the rules one by one but we erred on the side of caution by doing them heading by heading, which made it easier to keep track of. Once the rules had been run on the sets, we re-ran the reports in Analytics the following day to see which records still had outdated terms.

In addition to running normalization rules on specified sets, you can also run normalization processes on imports (for newly acquired records) and on saving bibliographic records in Alma. We considered whether we wanted to implement either of these options as part of the project. Given the huge variety of headings that could be included, we decided against it and instead we have set up a monthly Analytics report to pick up any new or amended records with outdated headings.

Display rules

There were a number of outdated headings which either didn't have an acceptable alternative or were likely to be updated by Library of Congress in the near future. Rather than changing the bibliographic records, we agreed to use normalization rules in our discovery layer (Primo VE, known locally as LibrarySearch) to replace the outdated headings as displayed in the public library catalogue.

The Ex Libris online help page (ExLibris, 2025 e) provided information on Primo normalization rules, syntax (which is slightly different to Alma normalization rule syntax) and examples. There were further examples on the Developer Network too (Vardi, 2023).

Fortunately for us, SUNY had already worked on a project to change subject headings and were Primo VE customers. Their SUNY's Change the Subject Project documentation (SUNY (State University of New York) Office of Library and Information Services, 2023) was very helpful and we 'borrowed' their normalization rule wording! Their rules worked for like-for-like swaps, e.g.

```
replace string by string (TEMP"1","Transexuals","Transexual people")
```

There were some headings in our rule which required a bit more work, for example, where we wanted to replace 'Learning disabled' with 'People with learning disabilities'. We wanted to replace the term if it was on its own in the record or if it was followed by another sub-field:

```
replace string by string (TEMP"1","Learning disabled.?$|Learning
disabled [^a-z]","People with learning disabilities")
```

This isn't a perfect solution as part of the delimiter (--) between sub-fields disappears in the display but it is a temporary solution. We are hopeful that the authority heading itself will change at some point in the future making the display rule obsolete.

There is more work that we could do with the display rules (creating local/non-authorised subject headings) to ensure that the subject searches work more effectively in Primo and we plan to revisit this in the future.

Controlled vocabulary

As already mentioned, a monthly Analytics report is sent to our Cataloguing team which picks up any records with outdated headings. The report is also available on-demand on the dashboard. The report includes the 997 field to make it obvious if the record has already been updated or reviewed. If the cataloguing staff manually update

any new records as a result of the report, we wanted to make sure they could add the same standard line of text to the 997 field as had been used in the bulk updates. In Alma, Vicky added a controlled vocabulary to the MARC21 bibliographic records in the 997 subfield a.

When the cataloguer is reviewing or updating a record from the report in the metadata editor, they add a 997 field $a and a dropdown with the controlled vocabulary will appear:

This both saves time for the cataloguer and ensures consistency, meaning that we can use the 997 text to report on the number of records which have been amended, updated or can't be updated but have an acknowledgement.

Conclusion

The project was a great opportunity to see how we could use Alma's existing processes and functionality to do both the remediation work and maintenance work. Vicky found learning about normalization rules really challenging; it was a steep learning curve but incredibly satisfying and rewarding to see the rules work. We feel

sure there are tricks we have missed along the way which could have improved our experience on this project, but we are happy with the results. We were privileged at Cardiff University to have a dedicated project cataloguer and a small team of systems librarians which meant that time, resource and expertise was available for the project. In addition, the Alma community is a vibrant and helpful space, and we definitely benefitted from the expertise and experience of library and technical staff across the world. I would encourage anyone who is undertaking a similar project to reach out to their fellow librarians and community members for help and advice.

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Changing the subject

The Homosaurus in Emory University's library catalogue

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ABSTRACT

The classification and cataloguing of LGBTQ+ materials in libraries has been, historically, less than equitable. Mainstream vocabularies such as Library of Congress subject headings are insufficient and inadequate descriptors of LGBTQ+ resources. One modern solution to this imbalance has been the creation of inclusive vocabulary lists designed to replace or enhance outdated and offensive terminology. This paper outlines a project by Emory University librarians to implement one such list - the Homosaurus - throughout their entire catalogue. Outcomes specific to the project, including the benefits and fallbacks of automation versus manual cataloguing, are debated while additional considerations, such as the need for ongoing staff training and consistent policies, are discussed.

In addition, the authors seek to examine the broader picture of inclusive metadata initiatives within the current political climate of the United States. While the Homosaurus has an important role to play in reparative cataloguing, it cannot stand alone and should be employed as part of a general commitment to just and representative metadata.

Introduction

Historically, the classification and cataloguing of Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ+) materials in libraries has been less than inclusive. In the United States, with approximately 21% of Generation Z identifying as LGBTQ+ in 2022 (Jones, 2022), rectifying this situation has become increasingly relevant. To address some of the imbalance, current work procedures within libraries are spotlighting the often antiquated practices of subject classification; including the problem of inadequate mainstream vocabularies for describing LGBTQ+ resources (Princeton Library, 2022; Fischer, 2023). Efforts to highlight and improve this inequity include the addition of alternative vocabularies as enhancements to bibliographic

records. One such vocabulary, which seeks to offer a more inclusive way to catalogue and classify LGBTQ+ materials, is the Homosaurus.

A Brief History of LGBTQ+ Classification

The United States Library of Congress (LC) created its subject heading and classification system in 1897 based on the principle of literary warrant. For most of the 1900s, LC derived literary warrant solely from the terminology appearing in its own collection (Greenblatt, 2011). Consequently, the initial Library of Congress subject headings' list reflected prevailing biases present in LC's materials, ultimately centring Western, white, male, cisgender, and heteronormative perspectives. The 1970s saw the tentative beginnings of a push against this status quo. One of the more influential criticisms was Sanford Berman's 1971 offering: *Prejudices and Antipathies: A Tract on the LC Subject Headings Concerning People*. Following the publication of this tract, Berman and his Hennepin County library colleagues created local headings pertaining to various topics, including sexuality. Eventually, some of these innovative terms were incorporated into the LC lists (Johnson, 2007). However, the intervening years have not resolved all problems or lessened the offences of subpar LGBTQ+ resource description. In 2011, Greenblatt noted that the LC heading *Gays* was an umbrella term encompassing gay men and lesbians. This, she suggested, was doubly problematic. As well as being ambiguous for users, it had the secondary effect of contributing to the issue of lesbian erasure.

Furthermore, when assigning terms related to LGBTQ+ communities, LC's subject headings were regularly derived from psychological and medical sources. This type of literature tended to link marginalised sexual and gender identities with perversion and fetishes. Choosing to mirror terminology derived from the *Diagnostic and Statistical Manual of Mental Disorders (DSM)* meant that terms such as *Homosexuality* were historically arranged under *Sexual perversion* and *Sexual deviation* in the LC hierarchy (Henry, Kauffman, & Chiu, 2022).

While the LC lists do contain some LGBTQ+ terms, their offerings can feel limited. The heading *Gender-nonconforming people*, for example, can be useful in some cases, but present LC guidance suggests that this heading be used in place of terms like "Gender-variant people," "Genderqueer people," and "Nonbinary people." This dynamic results in the description *Gender-nonconforming people* representing vast swathes of gender experiences without regard for self-identification or culturally specific contexts (The Trans Metadata Collective, 2023). In contrast, there are terms used by LGBTQ+ communities which may be more appropriate. Over the years, cataloguers have sought to overcome gaps left by inadequate LC-created terminology for LGBTQ+ experiences, and the Homosaurus is one way to bridge this divide.

The Homosaurus

The Homosaurus (https://homosaurus.org) is an international linked data vocabulary of LGBTQ+ terms. It was initially created by IHLIA LGBTI Heritage[1] as a standalone list to describe their collection. The Homosaurus definition of LGBTQ+ includes "lesbians, gay men, bisexual people, transgender people, and queer people, as well as intersex people, Two-Spirit people, asexual people, aromantic people, and other people whose gender identity, sexual identity, and/or sexual practices have been marginalized or minoritized by society or have otherwise historically experienced prejudicial exclusion" (Homosaurus, 2023).

Since its inception, the Homosaurus has been restructured and expanded. While work to make the subject terms incorporated by LC less biased has long been spearheaded by advocates such as Berman (Henry, Kauffman & Chiu, 2022), the creaky wheels of library bureaucracy move slowly. In direct contrast, the vocabulary provided by the Homosaurus has been carefully curated to support thoughtful subject analysis of LGBTQ+ materials, to offer better representation of LGBTQ+ topics, and to ensure that the vocabulary used in cataloguing reflects the current language of LGBTQ+ communities. Notably, while LC must justify adding or revising subject headings through literary warrant, the Homosaurus edits its vocabulary in response to evolving terminology. In addition to adding new headings as they gain currency, the Homosaurus solicits feedback and encourages collaborative term development between its editorial board, cataloguers, and the public. These crucial differences enable the Homosaurus to be an agent of change for equality and inclusion.

The Homosaurus at Emory

In an effort to make resources more discoverable and representative for their library users, Emory University's Robert W. Woodruff Library began the process of implementing the Homosaurus into its catalogue in 2021. Adopting the Homosaurus offers the Emory library community many benefits; including increasing the visibility of LGBTQ+ resources through the addition of more specific and inclusive subject headings, improving the research process by allowing library users to search for materials with terms that are relevant and preferred by LGBTQ+ communities, and facilitating searches that describe specific LGBTQ+ groups, subcultures, and identities that are not meaningfully represented by LC subject headings. Perhaps, most importantly, implementing the Homosaurus at Emory sends a message of inclusion to library users. As Hutchinson and Nakatomi point out, "while subject headings are intended to provide consistent subject access to resources of similar content, use of subject headings—whether intentionally or not—may reflect the cataloguer's personal values and beliefs, as well as the values of the era in which they create catalog records" (Hutchinson & Nakatomi, 2023, p. 382). Using the Homosaurus, a vocabulary that is developed and maintained by LGBTQ+ community members, communicates Emory Libraries' intention to respect LGBTQ+ voices in its catalogue.

[1] https://ihlia.nl/en

However, this critical work is not without its challenges. As Tanaka, Michael, and Slutskaya point out, "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" (Tanaka, Michael & Slutskaya, 2024, p. 1). Therefore, the first step of implementing the Homosaurus at Emory involved collaborating with a library vendor, Backstage Library Works, to create an automated crosswalk mapping Homosaurus terms onto existing LC headings in their records. Beyond creating one-to-one matches between the two vocabularies, the Backstage crosswalk added broader Homosaurus terms which serve to establish additional access points for LGBTQ+ discovery. For example, an LC subject string like *Transgender athletes–Fiction* does not only trigger the addition of the Homosaurus term *Transgender athletes* but also the terms *LGBTQ+ athletes*, *Transgender fiction*, and *LGBTQ+ fiction*. In many cases, the crosswalk also supplements inadequate LC terminology with better-suited Homosaurus terms, and headings like *Sexual minorities* trigger more inclusive language, such as *LGBTQ+ people*.

Since this initial integration, Backstage continues to supplement LC headings with Homosaurus vocabulary on an ongoing basis. However, while automation does augment inclusive cataloguing efforts, it is neither foolproof nor a replacement for manual enhancement. To this end, Emory community members—which includes staff, interns, and students—have been continuously refining the Homosaurus crosswalk; executing cleanup projects, and conducting targeted bibliographic enrichment to overcome gaps in LGBTQ+ resource description. To streamline and support these efforts, specific policies outlining when and how to use Homosaurus terms have been created. The policies cover issues such as self-identification, historical terms and slurs, racial and ethnic identities, and colloquial language (Emory Libraries, 2024). As well as offering guidance, these policies ensure that Emory cataloguers provide a consistent approach to bibliographic maintenance. Patrons and staff are invited to submit harmful language reports via the public-facing library page when they encounter terminology considered offensive or incorrect (Emory Libraries, 2024).

Current Political Climate in the United States

In the United States in 2025, the Homosaurus, along with other inclusive metadata initiatives, is more crucial than ever. Since January, a series of executive orders has been issued by the White House, using charged language purporting to end "gender ideology extremism" and defend the "biological reality of sex" (The White House, 2025). While the impact of these orders is ongoing, evolving, and yet to be fully understood, the current administration's intent to impinge upon the rights and protections of trans, gender diverse, and intersex people is clear. Notably, Executive Order number 14168, specifies that the United States will recognise only two genders, effectively throwing into question whether people existing outside of cisgender frameworks will maintain access to healthcare, civil protections, and accurate legal identity documentation (Cohen & Piper, 2025). Even more concerning is the removal of

online information related to LGBTQ+ communities. The National Park Service, for example, has removed the "T" and the "Q" from the LGBTQ+ acronym on the official Stonewall Monument website, a resource which had previously paid homage to the specifically trans-led struggle of the Stonewall Riots (Sim, 2025). Coupled with threatening guidelines released by the United States Office of Personnel Management instructing federal agency heads to take measures to, "end federal funding of gender ideology," (United States Office of Personnel Management, 2025) many other government websites have also expunged information relating to trans, gender diverse, and intersex people. These measures demonstrate an effort, unprecedented in the United States in recent times, to systematically erase federal recognition of previously protected minority groups.

While a full discussion of civil rights developments pertaining to LGBTQ+ communities in the United States is beyond the scope of this paper, the authors feel that this ongoing situation demands recognition when considering the urgency of inclusive metadata initiatives such as the Homosaurus.

Conclusion

In addition to improving LGBTQ+ discovery, inclusive cataloguing efforts such as the Homosaurus are part of a larger battle to respect the legitimacy and humanity of LGBTQ+ experiences. Libraries must take seriously the reality that, "queer and trans pasts are mediated by the information infrastructures that organize, describe, and construct those pasts to make them accessible to users" (Cifor & Rawson, 2022, pp. 2168-2169). Reflecting on the history of Library of Congress subject headings, it is clear that LGBTQ+ resource description has often reflected the prejudices of society at large. This, in turn, renders the catalogue a frequent site of misrepresentation, if not outright indictment, for LGBTQ+ communities.

Unfortunately, the conflict over accurate and inclusive LGBTQ+ resource description is ongoing. Recent campaigns in the United States targeting trans, gender diverse, and intersex people's access to healthcare and public life with a specific focus on erasing LGBTQ+ representation in federal history and health documentation demonstrate the urgency of establishing frameworks for accurate metadata. Accepting that the catalogue is not, and has never been, a neutral or objective space, it is then the responsibility of cataloguers and information professionals at large to correct what Cifor & Rawson (2022) refer to as, "a fundamental failure of information institutions' missions to connect users and information" (p. 2169) when it comes to LGBTQ+ resource description.

Emory Libraries' implementation of the Homosaurus is an imperfect but valuable step towards addressing the problem of inadequate subject terminology in LGBTQ+ cataloguing. The reality of working with a sizable collection is that changing metadata on such a large scale is technically challenging and labour-intensive. Automation might be one key but, as Tanaka, Michael, & Slutskaya (2024) point out, "additional

ongoing commitment and investment in training, policy development, and user education is essential for sustained, long-term success" (p. 2).

To put a finer point on it, more needs to be done to increase the discoverability of LGBTQ+ materials and address the history and ongoing reality of prejudicial exclusion. Too often, metadata efforts are hidden behind a smokescreen of mysterious complexity. It is the hope of the authors that Emory's work with the Homosaurus will create some well needed illumination and contribute, in a small way, towards a future of more inclusive LGBTQ+ cataloguing.

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Updating subject headings for children's literature at the University of Strathclyde
the Children's Theme Index

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ABSTRACT

The Cataloguing and Metadata team at the University of Strathclyde recently undertook a comprehensive review of subject headings used for the Library's collection of children's literature. The purpose of this review was to bring this set of in-house subject headings up to date, make it more representative and inclusive, and better integrate it with cataloguing workflows. This article introduces the collection and its subject headings, discusses why a review was needed, and outlines how the review was carried out, and how changes were implemented in the LMS and discovery service.

Introduction: The Children's Books Collection

The University of Strathclyde has a long tradition of teacher training, which continues today through the teaching and research activities of the Strathclyde Institute of Education. The university library plays an essential role in supporting these activities, and one of the ways this is done is through the provision of a collection of children's literature. The Children's Books collection originated in the Jordanhill College of Education, which was founded in the early 20th century in the west end of Glasgow. In 1993 Jordanhill College merged with the University of Strathclyde to become the university's Faculty of Education. The Jordanhill campus (and its library) was eventually closed in 2012, and the library's staff and collections relocated to the Andersonian Library in the city centre.

While most books from the Jordanhill library were simply merged into the main lending collection in their new home, the Children's Books collection was kept intact and shelved separately. Most of the local cataloguing and classification practices for children's literature that originated at Jordanhill are still followed today. The non-fiction material in the collection follows standard Dewey Decimal Classification, but for literature there is a local scheme, a simplified version of which is shown here:

J 808	Children's literature
J 808.1	Poetry
J 808.2	Drama
J 808.3	Fiction
J 808.33	Picture books
J 808.34	Giant picture books
J 808.35	Dual language books
J 808.36	Gaelic books

This is not a traditional children's collection. It is not directly accessed or used by children but rather by the students and staff of the Strathclyde Institute of Education, who select books either for research or for use in the classroom while on placement. It can be a difficult collection to 'shelf-browse' as all the books (including picture books with narrow spines) are shelved spine-out; there are none of the mobile book browsers typically found in the children's section of a public library. This means that catalogue records – especially the subject headings – are crucial in helping users to navigate the collection.

Figure 1: Part of the Children's Books collection in the Andersonian Library

The Children's Theme Index

Another significant difference between the Children's Books collection and the rest of the collections in the Andersonian Library is in the use of subject headings. While almost all our other collections use Library of Congress Subject Headings (LCSH), this collection uses a locally-managed resource called the Children's Theme Index (CTI). This is another piece of cataloguing practice that was carried over from the Jordanhill library.

Users have diverse reasons for using each book in the collection. For instance, *Elmer*[1] (McKee, 1989) is, at surface level, a book about animals and colours, but it can also function as a book about self-esteem or the value of diversity. This means that when cataloguing a children's book, we aim to add a range of subject headings, covering the immediately apparent topics of the book as well as broader, more nebulous themes.

A particular advantage of using locally-managed subject headings for this collection is that they can be customised to suit the needs of our users and mirror the terminology they employ in their own academic and professional practice. We can also add terms that have local or cultural relevance, which may not be available in LCSH. For example, the OCLC record we imported for *The Secret of the Kelpie*[2] (Don, 2016) used the LCSH term 'Horses', which doesn't quite do justice to the nature of this mythical, shape-shifting creature. We replaced this in our catalogue record with the CTI term 'Kelpies'.

The use of pre-coordinated headings in LCSH can also make them unsuitable for use in this collection. Taking *The Lighthouse Keeper's Lunch*[3] (Armitage & Armitage, 2007) as an example, the OCLC record includes the following LCSH entry:

```
650 #0 Lighthouse keepers ‡v Pictorial works ‡v Juvenile fiction.
```

The use of the subdivisions in subfields ‡v are not strictly necessary in our case. 'Juvenile fiction' is a given and could reasonably be applied to every book in the collection. 'Pictorial works' is arguably unnecessary too, since we group picture books together at a single classification number (although we do have a form term for 'Picture books' in the CTI that can be added to MARC field 655).

Time for an overhaul?

It is clear why the librarians at Jordanhill created the CTI and why its use continued after the two libraries merged, but it is worth noting that the index was created over 15 years ago and has only had irregular, ad hoc changes in that time. There has been a noticeable uptick in the number of change suggestions received in recent years, possibly attributable to an increased focus on the ethical aspects of our cataloguing and classification work. These change requests have mostly focused on EDI-related concerns such as removing outdated or offensive terminology and adding terms for topics not yet represented in the CTI.

The previous process for dealing with change requests was very informal. The decision on whether to approve or reject a request rested solely with the Cataloguing and Metadata Manager and was therefore open to that person's conscious and unconscious biases. This presented a particular problem when dealing with books covering sensitive or contentious subjects. From a technical standpoint, this haphazard method of approving or rejecting changes also led to some inconsistencies

[1] https://suprimo.lib.strath.ac.uk/permalink/f/1vf34ij/SUALMA2148595810002996
[2] https://suprimo.lib.strath.ac.uk/permalink/f/12er6ft/SUALMA2174665170002996
[3] https://suprimo.lib.strath.ac.uk/permalink/f/1vm6dnl/SUALMA2162802700002996

and in general there was no broad overview of how the index should be structured and how terms should be applied. The CTI itself was simply an A-Z list of approved terms in a Word document, stored on a networked drive. There was no authority control for CTI terms in the Library Management System (LMS), and there was no integration with cataloguing workflows. This meant it was easy for spelling errors and unauthorised terms to creep into catalogue records. It was therefore decided in late 2023 that the Cataloguing and Metadata (C&M) team would undertake a thorough review of the CTI, with a view to addressing both the content of the index and the way in which CTI terms are managed and applied in the catalogue.

Reviewing the terminology

The primary purpose of this review was to make the terminology in CTI easier to understand, more current, more inclusive, and more representative of the collection. We began by dividing the terms in the previous version into broad categories, based on BISAC subject headings (Book Industry Study Group, 2023) and Thema subject categories (Children's, Teenage and Educational, 2022). The re-ordered index was copied into an Excel workbook on SharePoint and opened up to the C&M team for comments. Team members were asked to review every term in the index, and to make as many suggestions as they could. After a few months, during which time hundreds of suggestions were received, we began a series of long meetings to discuss the suggestions and collectively approve or reject each addition, change or deletion. This was the most time-consuming part of the project and involved some lengthy debates about the merits of individual terms. Throughout the project there was an emphasis on backing up changes with authoritative sources and we identified some key resources to use as evidence across the CTI. These are cited throughout the CTI files on GitHub (https://github.com/strathcat/cti), but it is worth highlighting the Inclusive Terminology Glossary (Chew, 2023), Homosaurus (Homosaurus, 2025), the Cataloguing Code of Ethics (Cataloguing Ethics Steering Committee, 2021), NHS Inform (NHS Inform, 2024), the SPECTRUM document on empowering language to talk about disability and disabled people (SPECTRUM Centre for Independent Living, 2018), and some of the university's own in-house guidelines on inclusive terminology (Kaur, 2023; School of Humanities Gender Equality, Diversity and Inclusion (GEDI) Committee, 2022; University of Strathclyde, 2022).

Once we were happy with this 'beta' version of the updated index, we began to approach colleagues outwith the C&M team for input. We consulted with the library's Research and Learning Support team and held meetings with members of staff from the Strathclyde Institute of Education. Although our academic colleagues did not engage with the spreadsheet to the same extent as the C&M team, they did provide some essential feedback in those meetings and flagged up some important internal resources which helped to ensure that the terminology in the revised CTI mirrors the language employed by the staff and students who use the Children's Books collection.

A key source of dissatisfaction with the previous version of the CTI was the lack of guidance or documentation about how the index should be managed. We were keen to avoid having to create an extensive technical manual and getting bogged down in semantic arguments, but we did need some simple rules to help enforce consistency in the CTI going forward. Some new rules were agreed, some devised at the very beginning of the project, and others arising out of discussions during the revision process:

1. As far as possible, CTI terms should be in simple English.
2. Change requests should be discussed by the C&M team in the first instance, but colleagues in the Library and beyond should be consulted if an easy consensus is not reached.
3. Topical and form terms should not be mixed. Form terms (e.g. the term 'Pop-up books' which describes the physical form of the book, not its subject matter) are managed in a separate list and recorded in MARC field 655 instead of 650.
4. A new term should not be added if the concept can be represented using a combination of existing terms (e.g. rather than creating a topical term for 'Dyslexic teenagers' we would expect cataloguers and users to use the existing terms 'Dyslexia' and 'Teenagers').
5. Nouns should be plural (e.g. 'Parrots', not 'Parrot').
6. Additions and changes to the index must be evidence-based and should be accompanied by a scope note where applicable. This helps current and future users to understand why we have chosen the terminology in each term.
7. Subject terms for names of people (MARC field 600), corporate bodies (MARC field 610) or geographic places (MARC field 651) are not in the scope of the CTI and should be recorded using LCSH.

Improving workflows

Once we had a revised list finalised, we began looking at how to improve the technical aspects of the management and use of the CTI. As mentioned above, the previous version of the CTI was a simple Word document; it was not available to anyone outside the C&M team and was not integrated with our LMS (Alma) or discovery platform (Primo). CTI terms were previously added to MARC field 690 (Local Subject Added Entry), which is not a controlled field and cannot be easily monitored in Alma. We decided to create a MARC Authority version of the CTI, which could be locally managed in Alma, meaning cataloguers could browse and select index terms in the Metadata Editor. Non-preferred terms in bibliographic records would be automatically corrected, and unauthorised terms would be flagged up in Alma's Authority Control Task List.

Using a combination of Excel and OpenRefine, the revised CTI was converted to a spreadsheet with each column mapped to a subfield of a MARC Authority record. This

was then converted to MARC format using the Delimited Text Translator in MarcEdit. Some additional work was required in MarcEdit, such as amending the Leader field and fields 003, 005, 008 and 040. Each term was also assigned a control number in control field 001 (using the 'Generate Control Numbers' tool), which helps with tracking future changes to the index, and makes it easier to import new versions to the LMS.

The next step was to import this file to Alma. After adding a new local authority in the Metadata Configuration menu and making it available in the Metadata Editor, an import profile was created which uses the 001 field of the incoming record as a match point. This means that when importing new versions of the CTI in future, Alma will match the old and new versions using the control numbers created in MarcEdit.

Figure 2: Browsing CTI terms in Alma's Metadata Editor. Selecting a non-preferred term (e.g. Hearing disorders) redirects the cataloguer to the relevant preferred term (e.g. Hearing impairments).

With the new authority records available in Alma, it was necessary to update the approximately 11,000 bibliographic records that still contained terms from the previous version of the CTI in uncontrolled 690 fields. This involved a combination of normalisation rules (to replace deprecated CTI terms for personal, corporate, and geographic names with their LCSH equivalents) and editing records in MarcEdit to run a series of bulk 'find and replace' jobs. As a final check, an indication rule was run on the full set of 11,000 bibliographic records to identify any that still included an old 690 field.

The situation we have now is that cataloguers can use the revised CTI in a controlled manner within Alma, and regular checks of the Authority Control Task List help to identify any errors. From its beginnings as a restricted Word document filled with outdated terminology, the CTI is now arguably one of the most tightly controlled and up-to-date parts of the entire catalogue.

Hearing impairments	

Authority (9813306937602996)	Bibliographic Records(0)

LDR	00510cz##a2200169ni#4500
005	20240501130754.0
008	240501#|eanznnbaba###########a#ana#####d
001	9813306937602996
040	‡a StGIUS ‡b eng ‡c StGIUS ‡d StGIUS ‡f local
150	‡a Hearing impairments
450	‡a Hard of hearing
450	‡a Hearing disabilities
450	‡a Hearing disorders
450	‡a Hearing loss
550	‡w g ‡a Disability
670	‡a https://spectrumcil.co.uk/wp-content/uploads/2018/02/ULO19-The-Language-of-Disability.pdf
035	‡a (StGIUS)CTItopical00315

Figure 3: The MARC authority record for CTI term 'Hearing impairments' in Alma. The source for this choice of terminology is shown in field 670.

Making the CTI more open

An important aim of this project was to make the CTI more open, transparent and accessible. Although the CTI has been revised with our specific collection and use case in mind (i.e. it is designed for staff and students of the Strathclyde Institute of Education, using a children's fiction collection with a bias towards Scottish education), we believe it can be of use to librarians and others working with similar collections elsewhere. With this in mind, one of the first things we did with the new MARC authority files was to add them to a GitHub repository (https://github.com/strathcat/cti) under a Creative Commons licence, and we hope our work will find some application outwith our own institution.

We have also made changes to the process for dealing with change requests and welcome suggestions from the C&M team and beyond via an online form (https://forms.office.com/e/uGXaBM2EKq). Suggestions can be submitted anonymously if preferred, but we do encourage requesters to submit an email address (to facilitate further discussion and requests for information) and some additional evidence (e.g. a note of which titles would be affected by the change, and any relevant citations or authoritative sources). Change requests are then discussed at the C&M team's weekly meetings. The decisions made using this process to date have been straightforward but as noted above in the new rules, we would look to involve colleagues from the Library and beyond if we could not reach a decision within the team.

In terms of future development, we are seeking to make it easier for users and library staff outwith the C&M team to search and browse the CTI. We are considering changes to the search and filter options on Primo to help with this, as well as adding some guidance for users to our existing LibGuides pages for the Children's Books collection.

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Narrowing the diversity gap

LGBTQ+ zines, metadata and discovery at the University for the Creative Arts

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ABSTRACT

The Zine Collections at the University for the Creative Arts are experiencing significant growth, particularly in the areas of Equality, Diversity, and Inclusion. Given that many of these zines are handmade and independently published, they are seldom purchased as "shelf-ready" items. Consequently, new acquisitions have presented a valuable opportunity to assess metadata requirements and subject categorisation as they are catalogued in-house. This article will outline our cataloguing and metadata initiatives, with a particular focus on the description of our LGBTQ+ zine collection, addressing subject headings, summary provision, challenges faced, and the overall impact of our efforts.

Introduction

At the University for the Creative Arts, I am part of the Collections team, consisting of five members. In my role as both the metadata lead and the primary cataloguer, I recognise that large projects may extend beyond our staffing capabilities. Nevertheless, we are actively engaging in efforts to incorporate Equality, Diversity, and Inclusion (EDI) principles into our cataloguing and metadata practices in a manageable, day-to-day manner. By incorporating EDI considerations into our workflows, we aim to create a more inclusive and representative framework for organising and accessing our resources and to reflect the rich diversity of UCA's community.

Why zines are significant in this context

In alignment with our ongoing commitment to enhancing the diversity and inclusivity of our library collections, we are proactively seeking resources that broaden these areas. Notably, our Liaison Librarians have increased zine purchases. These come from various sources, including publishers and presses such as the Common

Threads Press[1], online marketplaces like Etsy, direct from artists' websites, and from our own students. Zines support academic courses, aid librarians in educational initiatives and, importantly in an EDI context, help users see themselves reflected in library resources whilst exploring diverse experiences. They are often then used directly with students through initiatives such as zine-making workshops, and by featuring them on theme-specific reading lists.

Figure 1: A selection of zines at UCA

However, as well as narrowing a gap in terms of EDI, zines represent one of the few resources we manage that require manual cataloguing and in-house processing. This presents a valuable opportunity to closely examine the items, in contrast to our shelf-ready materials. They offered therefore an obvious opportunity to explore metadata provision and discoverability.

Familiarity with the Cataloguing Code of Ethics (Cataloging Ethics Steering Committee, 2021), the Zine Librarians Code of Ethics, 2015 and the Queer Zine Library Cataloguing manual (Queer Zine Library, no date) fed into what we ideally wished to address in the cataloguing of these materials, with the knowledge that time and staffing would curtail any in-depth analysis of the tools available to us. The objective was to achieve immediate outcomes that enable EDI to be integrated into our workflows efficiently, without introducing significant complexity or expanding into a larger project than originally planned.

Subject headings for enhanced discoverability

We began with looking at the availability and usefulness of relevant subject headings. Like many university libraries in the UK, we use Library of Congress Subject Headings (LCSH) to describe our resources, due to various budgetary considerations

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[1] https://www.commonthreadspress.co.uk/

and workflow requirements. However, this reliance on established terminology can necessitate the acceptance of outdated terms that are slow to evolve.

We encounter many examples of LCSH terms in supplied records that are now seen as reductive and outdated in terms of EDI. Some of these subjects have been updated, such as the terms "Blacks" and "Whites", which were updated to "Black people" and "White people" respectively in 2022. Additionally, the term "Gays" was updated in 2023 to "Gay people" within the context of LGBTQ+ terminology.

While these updates are a significant improvement, it has been important to remain aware of the authority work required to retroactively reflect these changes. We performed bulk updates to these headings at the time of changing but downloading ebook updates or accepting older print book records can reintroduce outdated terms. We manage this by manually analysing authority update reports to identify and update unauthorised headings to current terminology.

In terms of our LGBTQ+ zines, it quickly became obvious that LCSH alone was not serving us in terms of description and full and transparent discoverability. We decided to invest some time in exploring alternative thesauri that more comprehensively reflect the themes involved, as well as the language used by both our users and the zine creators.

This quickly led us to the Homosaurus, a data vocabulary of LGBTQ+ terms intending to function as a companion to LCSH and other broader thesauri, and which aims to advance the discoverability of LGBTQ+ resources and information. This seemed an excellent place to start, if not rather overwhelming at its sheer breadth of terms.

An example of a subject heading that immediately became important for us was the term "Queer"[2] or "Queer identity". Throughout the LGBTQ+ zine collection, this term seemed to be the most used in terms of the communities and people they represented. LCSH do not adequately address this topic; some terms exist, such as "Queer comic books," "Queer fiction," and "Queer studies", but there is inconsistency in the application; often preferring instead the terms "LGBT", "LGBTQ+", and "Sexual minority" interchangeably. For example:

- "Queer activism" is an unauthorised *See from* term, under "LGBT activism"
- "Queer culture" is an unauthorised *See from* term, under "Sexual minority culture"
- "Queer people" is an unauthorised *See from* term, under "LGBTQ+ people"

While LGBT and LGBTQ+ are acceptable (though it would be preferable if LCSH stuck to one form of acronym), "Sexual minority" is an option we would prefer to avoid using (though there are currently many examples of this in our legacy metadata).

[2] There is a very interesting post, *'Queer' history: A history of Queer* by Mollie Clarke on the National Archives blog, posted Tuesday 9 February 2021. Available at: https://blog.nationalarchives.gov.uk/queer-history-a-history-of-queer. [Accessed: 4 March 2025]

Conversely, Homosaurus has a significant number of options, including "Queer", "Queer identity", "Genderqueer identity", and "Queer culture". It also incorporates various identifying terms, such as "Indigenous queer people", and "Asian queer people". While identifying terms are served by LCSH with the heading of "Gay people", for example, "Jewish gay people", and "Indian gay people", we felt this language did not accurately represent the tone and themes of our zines collection, or its users.

For example, *Mixd Azn queers* by Jess Wu-O (see Figure 1), a zine about Asian queer and trans identity. Here, the use of the Homosaurus vocabulary was exceptionally effective in accurately describing the zine in question, with its headings of "Asian queer people", "Asian transgender people" and, more generally, "Queer identity", selected from an extensive list of terms including "Asian LGBTQ+ people", "Asian bisexual people", "Asian gay men", "Asian intersex people", "Asian asexual people" and "Asian non-binary people" among others.

This diversification of terms is crucial, and although we cannot dedicate as much time as we would like to exploring and applying them in depth, we believe this has been an important start to the work of cataloguing LGBTQ+ zines and in making them more discoverable, more inclusive, and more representative of the communities they represent.

Adding detailed MARC 520 tags (summaries)

To further enhance discoverability, we have incorporated extended summaries in MARC tag 520 whenever feasible. These summaries aim to include additional keywords and provide a more comprehensive representation of the zine's contents. This process involves either a brief analysis of the zine itself, utilising publisher descriptions, or referencing descriptions provided by the creator within the zine, on personal websites, or on platforms such as Etsy, from which we acquire many of our zines.

While this can be quite time-consuming, it has proven to be worthwhile. Although subject headings play a significant role in discoverability, our summaries—often written in the same voice as the creator—offer a more detailed representation of what readers can anticipate in the zine, particularly for those with unspecific titles or no title at all.

For example, for the title *Archiving Joy*, we included subject headings which represented the work, but also an added summary by the artist:

Abstract

A story of my Great Aunt Joy b.1924, a transgender woman, a veteran, a musician, a civil servant, an aunt, a sister, and a partner. Archiving Joy is the story of Rosemary Joy Erskine, local artist Lu Williams' Great Aunt Joy. The tale of Joy (b. 1924 d.1995) starts from family oral history and delves into the archive, pulling together fragments of a colourful life, weaved in with contributions from local artists, writers, and historians. This retelling of Joy's life is joined by artist, writer and researcher contributions, reimaginging and reflecting on our current archival process in the UK. -- Artists website.

Library Notes ⌃

General Note

Zine. A5 perfect-bound volume with cover featuring gold foiling embossed by hand.
Title and statements of responsibility from titlepage.

Subjects ⌃

Gender nonconformity.
LGBTQ+ zine.
Queer identity
Transgender women.
Zines.

Figure 2: Section from the "quick look" view on Summon for the title "Archiving Joy"

Physical organisation and presentation of zines on ResourceBank

Zines were formerly arranged simply in alphabetical order within Special Collections, but as numbers increased it was decided they needed further arrangement physically, to optimise discoverability and use.

In collaboration with the University Archivist and staff from the Digitisation Unit it was decided to arrange them thematically, with broad subjects including LGBTQ+ zines, Identity zines, Feminism zines, and Activism zines. Zines were then boxed and shelved within their themes, and the arrangement was duplicated digitally on ResourceBank, our database of digitised archive collections. A select number of fields from the library catalogue record were extracted and uploaded here, alongside digitised covers of each zine.
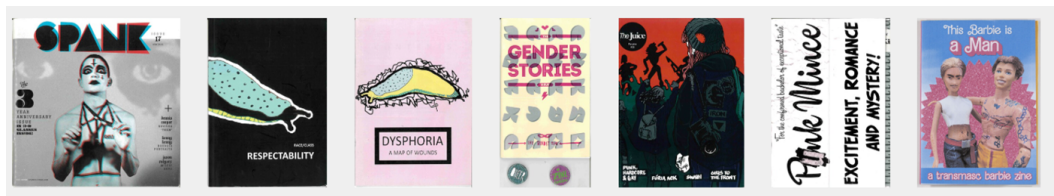

Figure 3: Screenshot from UCA ResourceBank.

We established a connection between the two systems by integrating a link in ResourceBank to the catalogue record and retroactively incorporating ResourceBank's broad subject areas into a local subject field (MARC tag 653) within the main MARC record. The latter was accomplished manually and is now part of the workflow of cataloguing new zines in both systems. This enhancement allows users to search for pertinent subjects, such as "LGBTQ+ zine" across both systems to locate related zines.

Challenges and limitations

We recognised we were not able to conduct a comprehensive survey and analysis of all subject thesauri available. We strategically selected zines as our area of focus, acknowledging that although they are a small sub-section of our collections, any work to enhance our cataloguing efforts would represent a meaningful step forward. It was with these limitations in mind that we commenced the manual integration of Homosaurus headings on an item-by-item basis.

We acknowledged that the potential for unconscious bias should not be ignored and identified that we may not always be best positioned to assign detailed subject headings in areas that do not affect us on a personal level. Moving forward, we would like to engage zine creators, particularly our students, in the description of our zine collections. In the instances where we solicited input from our students, for example when they have donated personal zines made in zine-making workshops, they were enthusiastic and eager to contribute in this respect.

Another consideration was to ensure that the changes we made to records were effectively represented in our discovery layer. We soon realised that Summon required additional customisation to properly display zine summaries, which we were able to implement promptly. Furthermore, we needed to confirm the functionality of the display and search features for the local subject field (MARC tag 653).

Figure 4: Screenshot of how a zine appears on our discovery layer as part of a broad search; it was important that the summary appeared in part, even in a list of full search results.

Impact and thoughts for the future

The impact of these changes is yet to be ascertained fully. The physical arrangement of the zines and discoverability on ResourceBank have made a positive difference to how they are used internally with our staff and students and feedback has been positive.

With any such project, it is beneficial to communicate updates to our colleagues. To this end, we provided a summary of our work to all staff through our Library Connect newsletter.

Going forward, input from our users would be an interesting project to undertake, to explore how they engage with the catalogues and how they perceive the language used in both the resources and how they are described.

Now that we have explored the area of LGBTQ+ zines and their description, the additional work has been integrated into our standard cataloguing workflows. Moving forward, we anticipate that as we gain greater familiarity with Homosaurus, we will be able to develop in-house guidelines for its use to enhance and further streamline our processes.

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The Cataloguing Code of Ethics since 2021
What next for your Code?

Jane Daniels

Cataloguing Ethics Steering Committee Representative – UK

ABSTRACT

This article provides an update on the Cataloguing Code of Ethics since its publication in 2021. It details the Cataloguing Ethics Steering Committees' (CESC) work in promoting the document and mentions community use. The Committee's aspirations and plans for the document during 2025 are outlined and the article concludes with the authors' personal observations regarding how the Code might evolve.

Introduction

In January 2021 the Cataloguing Code of Ethics[1] was published by the Cataloguing Ethics Steering Committee (CESC)[2].

This followed a 2-year open and inclusive project involving written submissions from 74 volunteers in six working groups drawn from the international cataloguing community of practice, plus feedback provided from the wider community on the two draft versions of the document.

The Code was created for and by the cataloguing community of practice; and it addresses the particular and unique responsibilities of anyone who creates, shares, enriches or preserves metadata – regardless of the sector that they work in or the standards that they use.

Most importantly it reaffirms our commitment to doing this work for all sectors of our societies - not just those groups that have traditionally or historically seen themselves reflected in our published output and inevitably in our collections.

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[1] https://docs.google.com/document/d/1IBz7nXQPfr3U1P6Xiar9cLAkzoNX_P9fq7eHvzfSlZ0
[2] https://sites.google.com/view/cataloging-ethics/home

The Code since 2021 – Endorsement by our professional organisations

For the CESC the Codes' publication marked the beginning of an advocacy journey that we are still embarked upon today.

Our first task was to seek endorsement for the Code from our 3 sponsoring professional organisations, as the document was always intended to complement their ethical guidance.

Endorsement came first from the American Library Association in October 2021; followed by CILIP in March 2022 - the Code was subsequently added to the CILIP Ethics Hub (CILIP, no date); and finally, by CFLA-FCAB (Canada) in October 2024.

Advocacy for the Code in the UK

But even as our representations were under consideration in the UK, USA and Canada we engaged with as many groups as possible to promote the Code, not only to cataloguers, but also to the wider information profession.

A timeline of the CESC advocacy activities can be found on the CESC website page Steering Committee Updates[3] which includes presentations slides with additional links to some presentation recordings[4] but here is a selection of our advocacy work.

In the UK between 2021-2023 there were informal meetings or conference presentations/workshops for CILIP and its LGBTQ+, Rare Books and Special Collections, International Librarians, and Metadata and Discovery special interest groups as well as for The Collections Trust, ARLIS Cataloguing and Classification Committee and the Critical Approaches to Libraries Conference (CALC).

Also, during 2023 the Code was translated into Welsh and was cited in the National Library of Wales (2023) (Draft) Collections Description Policy (Llyfrgell Genedlaethol Cymru, The National Library of Wales, 2023); and workshops on the practical use of the Code were delivered to the WHELF Metadata Group and to curatorial and documentation staff at the National Museum of Wales.

In Scotland there was a presentation to the SCURL EDI Network in 2023 and there is a proposal to translate the Code into Gaelic scheduled for discussion at the CILIP Scotland Board of Trustees meeting in April.

In December 2024, to promote the Code to more partners in the wider metadata ecosystem, it was shared with an audience comprising librarians, publishers and content, systems and metadata vendors at the UKSG Forum in Birmingham (Daniels, 2024).

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[3] https://sites.google.com/view/cataloging-ethics/home/updates
[4] https://sites.google.com/view/cataloging-ethics/presentation-recordings

We hope that this UK-based advocacy has shown the value of using the Code and we are grateful for any public institutional endorsement such as that contained in the cataloguing section of the London School of Economics Library Collections Policy (The London School of Economics and Political Science. Library, 2023).

The Code has also been used by Andrew McAinsh and his team at the University of Strathclyde during a project to update the library's locally devised and managed subject headings for children's literature, an experience shared at a CILIP Scotland Metadata and Discovery Group online event (Bite No. 7) in January (McAinsh, 2025) [*Editors note: a write up of this project is also included in this issue of C&I*]. Not mentioned at the event, but confirmed in subsequent correspondence, was the use of the Code to obtain management endorsement for a name change requests policy in 2024.

Advocacy for the Code in North America

In the USA, where the idea of the Code was conceived, we are fortunate to have eminent and active library educators and practitioners involved in continuing advocacy for the Codes' adoption and use.

Yon and Willey used the Code to retrospectively analyse a cataloguing project undertaken before 2021 concluding that

> 'It was initially tempting to view the code as a checklist of things the authors did well, and not undertake further consideration; however, the introspection became more valuable when they viewed the code as a guide to thinking about ways in which the project succeeded and could have been improved. This helped the authors become aware of opportunities for future research, potential retrospective projects, and where their ethical practice in everyday work can be improved. While the general nature of the code can be seen as lacking specificity, it also encourages deeper engagement with cataloging work.' (Yon and Willey, 2021, p. 129)

In 2024 CESC Co-chairs Karen Snow and Beth Shoemaker re-ran a 2019 survey originally created to gauge practitioner ethical perspectives. Amongst other things respondents were asked to define cataloguing ethics and it will be interesting to note whether the 2024 survey responses reference the Code to answer this question.

In Canada, CESC Canadian representative May Chan worked with her colleagues in the Canadian Federation of Library Associations (CFLA-FCAB) Cataloguing and Metadata Standards Committee (CMSC) to seek endorsement for the Code.

The Cataloguing Code of Ethics Review Working Group (CCERWG) presented a report to the Federation in 2024 (Cataloguing Code of Ethics Review Working Group, 2023). This document informed the decision by CFLA-FCAB to formerly endorse the Code but also made some important observations and recommendations regarding next steps.

The consultation established that there was overwhelming support from the participants for the Code to be endorsed (84% for, 14% against). However, the working group recommended (Cataloguing Code of Ethics Review Working Group, 2023, pp. 9-10) further analysis of the reasons that were cited for non-adoption e.g. a perceived lack of inclusivity in the Codes' language; the doubts of First Nations respondents regarding the Codes' ability to reflect their culture and indigenous ways of knowing; and the lack of resources at local, provincial and national levels to practically implement the Code equitably across the Canadian library sector.

International Advocacy for the Code

The Code has also garnered the attention and interest of our wider international community of practice and this is evidenced by a number of community-supplied translations of the Code into Greek (Chantavaridou, 2023), Arabic (Zakaria, no date), Welsh (Llyfrgell Genedlaethol Cymru, The National Library of Wales, no date), French (Canadian Federation of Library Associations, no date) and Bosnian (Mirović, 2024 b). All of these can be accessed via the CESC website.

Additionally partial translations i.e. of the Codes' Statements of Ethical Principles have been produced by colleagues in South Africa, who translated the Statements into 8 of the 12 official languages.

We believe that these translations will equip our international workforce to consider whether the Code reflects their particular cultural values, histories and societies; and hopefully encourage participation in the revision and reframing of the next iteration.

Contact from and with the New Zealand and Australia cataloguing special interest groups during 2022 resulted in a presentation to LIANZA CAT SIG (LIANZA, 2022; Snow and Shoemaker, 2022); and in the Code being added to the ALIA ACORD cataloguing resources web page (ALIA Community on Resource Description, 2022). Additionally, preliminary feedback from colleagues in Australia in 2024 indicated that whilst there was strong support for the Code in principle there was concern that it did not adequately reference First Nations Australians history and culture. It was requested that the particular cataloguing issues of First Nation and Indigenous communities globally be included in any future versions of the Code.

Moving North, CESC presented to the South African cataloguing special interest group, LIASA IGBIS in 2023 and provided a follow up article for their newsletter. The response to the presentation was truly humbling as our colleagues immediately decided to survey their workforce regarding the suitability of the Codes' Statements of Ethical Principles to the South African context. As already mentioned, the Statements were translated to facilitate this exercise and the initial analysis was presented by Tienie de Klerk at the LIASA conference later that year (De Klerk, 2023). There were some interesting parallels with colleagues in Canada regarding the language used in

the Code and the perceived lack of resources to equitably apply the Codes principles across diverse institutions.

A final report detailing the findings and recommendations is being considered by IGBIS and should be available during 2025.

2023 also saw the Code translated into Greek (Chantavaridou, 2023) and an invitation to CESC to present from the University of Macedonia Library. This online event was very well attended with over 200 colleagues joining for the presentation and Q&A (pamaklib, 2023).

During 2024 the Code was translated into Bosnian by Dalila Mirović (Mirović, 2024 b),who also facilitated a presentation to the Department of Information Sciences and the Library of the University of Sarajevo.

Dalila subsequently wrote an article, which includes a diagram (Mirović, 2024 a) depicting the Codes importance as a tool to inform Cataloguer's judgement. When used in conjunction with our professional standards and rules cataloguers can describe and organise knowledge.
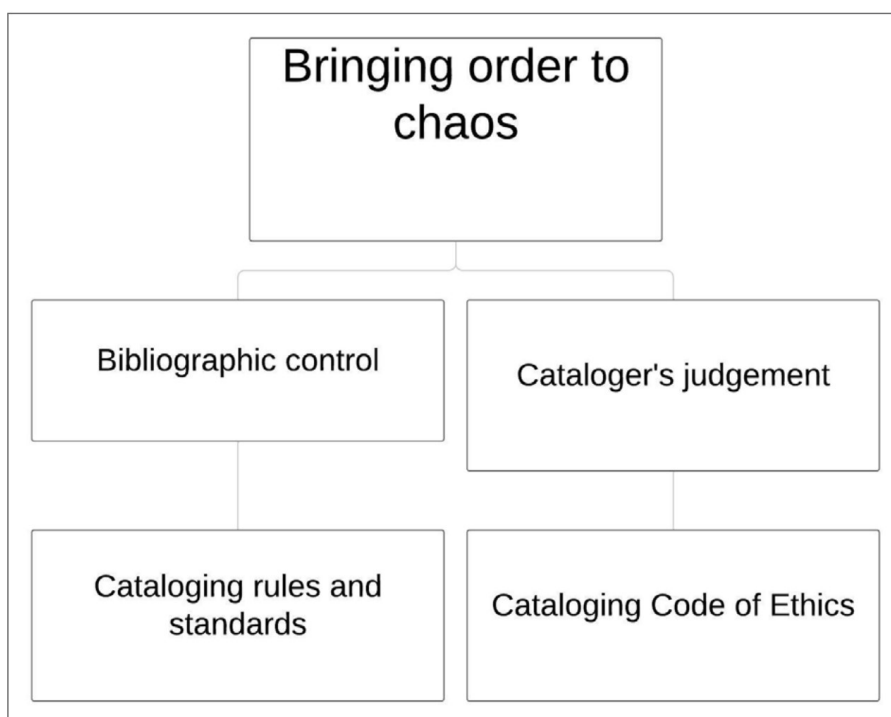

Figure 1: Diagram of the process of bringing order to chaos, with the documents that regulate or should regulate it (Mirović, 2024 a, p. 103)

Bringing our advocacy activities up-to-date, in February 2025 the Code was shared with colleagues at the Library Association of Ireland Metadata Groups' AGM in Dublin and there will also be a presentation to the Archives & Records Association conference in Bristol in August.

The Codes' Use in Library and Information Science Education

No review of the Codes' impact and use so far would be complete without acknowledging the support from the people involved in educating our workforce.

CESC members Dr Karen Snow, Sarah Furger, May Chan, Beth Shoemaker and Dr Diane McAdie have used the Code in their Library and Information Studies teaching.

An article (McAdie et al, 2023) based on a panel discussion at the Annual Meeting of the Association for Information Science & Technology explained how the Code had been a product of both practitioner input and research activity and advocated for more evidence-based cataloguing ethics practice.

During the same year Dr David McMenemy included the Code in Module 6 The Ethics of Information Organisation of the CILIP Scotland sponsored REVEAL (Reinforcing Ethics and Values for Effective Advocacy for Libraries) resource (McMenemy, 2023; CILIP Scotland, 2023).

Where next for the Code?

Now that the Code has been endorsed by CFLA-CFAB, the CESCs' intention is to present the document to the International Federation of Library Associations IFLA Cataloging Section[5] with a request that it is used to seed discussions regarding the creation of a truly international Cataloguing Code of Ethics.

We believe that IFLA is the natural home of the Code because the ethical issues embodied in the document are of common interest and concern for cataloguers and metadata managers across the world.

We hope that IFLA will use its network of international cataloguing communities of practice – particularly those where English is not a first language – to bring the Code to a wider audience and timetable the document's regular review so that it can evolve in response to our collective needs.

One possible immediate use for the Code could be the updating of an existing IFLA document: the IFLA Statement of International Cataloguing Principles (ICP) (IFLA Cataloguing Section, 2017).

An article by Zafalon and Oliveira da Silva in the December 2024 IFLA Metadata Newsletter reported that

> 'The comparative analysis of the literature on ethical values with the ICPs demonstrates some relationships ... However, it was also possible to perceive that some values ... were not addressed ... such as ethical responsibility, ethical sustainability, data protection and user privacy, ethical training, and intellectual property. This result encourages the

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[5] https://www.ifla.org/units/cataloguing/

need for future research to evaluate the possibility of updating the ICP in order to include ethical values absent in the current guidelines.' (Zafalon and Oliveira da Silva, 2024, p. 6)

This would seem to be a golden opportunity to use the Code – a product of the collective experience and wisdom of cataloguers from around the World - to plug an identified gap and inform the development of our international cataloguing principles.

The Codes' evolution – some personal observations

What might we need to change in the next iteration of the Code?

The Codes' language has been noted as referencing Western systems of oppression e.g. a correspondent recently pointed out that the use of the term 'white supremacy' in the Codes' Scope section was too specific. History records that supremacist activities and characteristics are not confined to white colonialist movements and it was suggested that 'racial supremacy' would be a better phrase to use.

Feedback from Canada, Australia and South Africa confirms that the Code needs to reflect and represent diverse populations' values, customs and knowledge systems. However, there is a balance to be struck in keeping the Ethical Statements high level and therefore broadly applicable across our global community of practice whilst also acknowledging, respecting and reflecting individual nations traditional values, according to the CARE (Carroll et al, 2020; Global Indigenous Data Alliance, no date) and OCAP (First Nations Information Governance Centre, no date) principles.

The Code does not acknowledge or mention the environmental costs and impacts of creating, sharing, enriching and preserving metadata. Can we condone the existence of so many metadata silos, and all of the energy and water resources required to create and maintain them, especially when there is so much duplication in and between them? This really is an area where all stakeholders in the metadata ecosystem should be considering closer collaborative efforts.

And finally, the Code does not explicitly mention AI (also a massive drain on environmental resources) but I would draw attention to Statement of Ethical Principle 5: *We support efforts to make standards and tools financially, intellectually, and technologically accessible to all cataloguers, and developed with evidence-based research and stakeholder input.*

AI is a powerful tool that can assist with many metadata tasks (Lowagie, 2024). But we must ensure that decisions regarding the use of current and future technologies pass the ethical tests explicit in the Code. In particular we should consider whether AI will ever be able to advance beyond processing metadata to be capable of applying the judgements that cataloguers use every day. E.g. Fox (2023) questions the ability of AI to apply the ethics of care, defined as valuing context, positionality, flexibility and ethical decision-making.

Conclusion

The creation of the Cataloguing Code of Ethics was a fantastic community initiative but it was only the first attempt at codifying cataloguers' particular ethical responsibilities.

Now, four years on from that accomplishment, it is time for a review utilising the infrastructure of IFLA so that the process, and the revised document, can be owned and used by more of our international cataloguing community of practice.

In the meantime, CESC encourages you to take what you need from the Code and adapt it, factoring in the needs of your unique, particular and varied communities and cultures; and please share your experiences locally, regionally, nationally and internationally so that the Code can continue to evolve to support you and your communities.

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Book review: Comics and critical librarianship

Reviewed by: **Karen F. Pierce** iD 0009-0003-2855-7919

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Piepmeier, Olivia & Grimm, Stephanie (2019, eds.) *Comics and critical librarianship: reframing the narrative in academic libraries*. Sacramento: Library Juice Press. ISBN: 9781634000802

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> "Comic book cataloguing is frequently distinguished by its absences, those fields and descriptions left off bibliographic and authority records."
> (p. 185)

I don't know how many UK academic libraries have comic or graphic novel collections (my own academic library certainly has a range available), these mediums are perhaps more readily found in public libraries unless specifically curated for research or teaching purposes, but from what I have learnt from this book they can also be used to help represent a more diverse population in the library than some of the books on our shelves.

The idea for the book stemmed from a session one of the editors attended at the Association of College and Research Libraries in 2017 at Baltimore, Maryland. The session she attended was about using comics within information literacy training, helping new students become more comfortable with asking questions. Thus, the idea for a volume on comics and librarianship was born. It should be noted that all the contributors are based in the US or Canada.

There is only one chapter on cataloguing comics sadly (from my point of view), but as the book encompasses a wide approach to comics and academic libraries this is not surprising. There are sections on the basics, collecting, organising, teaching and reaching; with chapters looking at representation, stereotyping, information literacy, exhibitions, censorship and empowering workshops, etc. they appear to have included something for everyone.

The 'cataloguing' chapter is not a basic 'how to' – you can find information elsewhere about that after all, but through the description of a project, the authors Liz Adams and Rich Murray explore the issue of inclusive cataloguing and the problems arriving from limitations with LCSH. "Apocalyptic comics, women detectives, and the many faces of

Batgirl: creating more inclusive comic records through flexible cataloguing practices" looks at the Edwin and Terry Murray Collection held at the David M. Rubenstein Rare Book & Manuscript Library, at Duke University. This is a large collection of 3500 titles, with 50,000 issues, and when it was originally acquired it was catalogued archivally with many parts grouped together in boxes under one title. This meant it was near impossible to search for and locate individual issues; later on, it was decided to catalogue each title individually.

There is a Library of Congress Subject Heading (LCSH) manual instruction sheet for cataloguing comics (H1430) and at the time of the book's publication it was quite limiting in what headings could be applied to records for comics. This sheet was subsequently updated in 2022, providing special provisions for increased subject access to fictional comics (bringing into scope some of the practices utilised by the authors). Prior to this update, for the Silver and Golden Age superhero comics that comprised the majority of the collection being discussed they would predominantly have only been able to add the heading "Comic books, strips, etc." which would not help in differentiating individual issues.

> "Cataloguers thus not only lose opportunities to disambiguate but also to have discussions about representation of characters who are not cisgender, heterosexual white men, and to situate these characters and comics in the world(s) in which they were created." (p. 188)

At the time the inability to add headings for most characters meant that Harley Quinn was excluded from having a subject heading on her self-titled series, although it was possible to add the supporting characters Batman and the Joker, who did have headings. In approaching their collection the authors of this chapter made the decision to ignore the instructions of H1430 (at that time) stating that headings should not be added for fictional characters, believing that subject access was the only way to provide access. They also broadened thematic access and used genre headings which had more detailed headings available for comics.

This chapter demonstrated the tension for cataloguers between accurately sticking to the rules versus making items accessible to library users. Ultimately the path they followed was more time-consuming and sidestepped some rules but opened up the collection to wider audiences with better searching and contextualisation. It appears they weren't alone in finding the approach to cataloguing comics limiting as the updating of H1430 demonstrates.

Inherent in the limited recommendations for fictional characters was the lack of representation for those that weren't white, cisgendered, heterosexual male characters.

In 1954 the Comics Code Authority brought in criteria censuring elements of sex, violence, horror, and moral ambiguity – mainstream comics needed this seal of approval for successful distribution, advertising and sale but as a result an

underground movement of comics (styled as 'comix') developed. A chapter by Kamaria Hatcher discusses independent comics and the significance of the diverse authorship that resulted, noting that: "…the presence of diverse narratives in the media has specific benefits, and the lack of it does specific harm." (p. 22). Hatcher also discusses the positive empathetic affect having access to multiple diverse perspectives has (as embodied in a wide range of comics).

Several chapters focus on the benefits of curating comic collections to better reflect their students or patrons. Callison, Sinclair & Bak discuss the Mazinbiige Indigenous Graphic Novel Collection at the University of Manitoba – which is the first ever indigenous graphic novel collection in an academic library and was developed to "…inspire critical discussion about representations of Indigenous people…" (p. 47) as well as to support relevant research and teaching. They emphasise the benefit of telling stories in a different way and how comics can provide a different emotional understanding to a subject alongside an academic text. Interestingly they note the difficulties that arose for the acquisitions team in acquiring some of the material, which was often from a small print run, by independent artists/authors, or historically rare.

There are chapters on African American comics, Afrofuturist comics and South Asian comics, and chapters exploring representations of gender and sexuality. Some of these collections are housed within the main library space and some occupy space within Special Collections. Descartes & Johnson explore feminist curating and the principles of intersectionality within the context of a specific exhibition, as well as more widely. They reference "…queer resistance to institutional categorization within academic libraries." (p. 338) as written about by Emily Drabinski and note that "Queering classifications acknowledges that truths and identities are ever-evolving, multi-layered and individualistic." (p.338) Their displays avoided using 'rigid classifications' and were installed to be site-specific, changing to reflect whichever space they were held in, with multiple collaborations.

I would recommend this book to broaden your understanding of the use and value of comics and graphic novels within a library setting, and to highlight the role they can play in bringing diverse representation into libraries. Although there is only one 'cataloguing' chapter it makes a lot of valuable points. This book would be ideal to share with all your library colleagues – particularly those involved in collection management, information literacy and EDI work.

Book review: Practical tips for Equality, Diversity and Inclusion in Libraries

Reviewed by: **Colette Townend**

Lambeth Libraries

Montague-Hellen, Beth (2024) *Practical Tips for Equality, Diversity and Inclusion in Libraries : Practical Tips for Library and Information Professionals*. London: Facet Publishing. ISBN 978-1-78330-601-5 (paperback), ISBN 978-1-78330-602-2 (hardback), ISBN 978-1-78330-603-9 (PDF), ISBN 978-1-78330-604-6 (EPUB).

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This is a useful handbook unpicking the descriptors and acronyms behind EDI, a recently evolved term used to encapsulate work and formal policies around equality, diversity and inclusion (as well as other occasionally included terms like equity, justice, belonging and dignity and similarly used acronyms DEI and D&I). Author Beth Montague-Hellen is a STEM library director and EDI specialist, here sharing her experiences in these fields as well as her personal lived experience as a library user with protected characteristics to provide guidance. She recognises concerns from audiences that EDI can be too often just "bandied about" without material impact, making clear her belief that "no one book, or author, or speaker can tell you how to 'do EDI'" (p. 1). She explains that to investigate the topic and work towards reducing inequality within a professional or social setting requires thoughtful consideration, expertise and positionalities to be built into an organisation's business-as-usual operations. This can achieve more depth to this work beyond a one-time policy paper rubber stamped with "EDI". The book's subtitle spelling out the acronym as "Equality, Diversity and Inclusion in Libraries" bridges between any organisational need to build an EDI policy and any other less formal inclusion projects in library settings. Montague-Hellen does also cover the high profile backlashes and criticisms to EDI work, both scepticism from marginalised groups and rolling back from conservative and right wing decision makers (p.7-8). Published in September 2024, the book predates the very recent anti-EDI rollbacks from the newly re-elected Trump administration. The future impact of this formal defunding of EDI programmes is yet to be seen and how legislators and managers respond to this topic is certainly going to be a significant concern for American libraries going forward, with wider implications for librarianship internationally.

As the latest in Facet's 'Practical tips for library and information professionals' series this book joins other titles on developing staff and successful library management. Within this context the book is positioned to be a useful addition to help libraries establish and develop core principles and service design. It is appropriate for all services across the library sector, suggesting equality and inclusion to be considered holistically rather than a tick box exercise or one time consideration. There are suggestions for policy and law compliance with a UK focus – using core legislation such as the Equality Act 2010 as anchors to understanding where protections in law both need to be adhered to and can create inspiration for local library policy implementation. It can be difficult for a library sector handbook to effectively straddle academic and public library sectors as the issues can very much vary. Montague-Hellen does handle this successfully, by focusing in on some identity and social group needs which will likely impact any library environment. Specific project case studies are given as suggestions for implementation throughout, for example Sheffield Libraries' Pride outreach stall (p. 66) and University of York's parent and child study space (p. 79-80) could both be beneficial projects if replicated in our public library service. Throughout the book there were only a few examples given that may not have a universal relevance. Another particularly good chapter was on organising and promoting events which could be used by an event organiser or to develop training for events staff.

Cataloguing gets a relatively succinct overview in a chapter about decolonisation in collections (p. 89-91). Montague-Hellen takes a relatively top-down look at the topic, asking the reader "Have you ever looked at your cataloguing system? Really looked at it, not taken it at face value, but dived deep?" (p. 89), an instruction to library management to take a critical end user consideration to a service's catalogue. The chapter argues that inequitable metadata and discovery is the result of a lack of catalogue record updates, personal bias and historic discriminating mismanagement. She does cite the original researchers who have written extensively on this (mostly north American such as Melissa Adler or Emily Drabinski) so a reader would have the opportunity to explore further by looking up these works. Montague-Hellen is not a cataloguer or metadata practitioner, and perhaps a book like this written by someone with this background would have a more in-depth section as there were fewer case studies than other areas. But it does evidence that metadata and discovery concerns around equality and inclusion are recognised at managerial level. I certainly think there is scope for some more UK specific case study examples here, such as UK specific subject headings, instances of international subject headings which do not fit the needs of marginalised groups in the UK or gender privacy in RDA authority control. All of which I imagine cataloguers would like to see on library leadership's radar. The chapter did include a case study on the Bliss classification system, historically assumed more neutral than the Dewey Decimal Classification. However, a specific analysis of its use at Queens College, Cambridge University (p. 90-91) found instances of item classification the scheme upheld biases from staff and their worldview over the years of its implementation. This was a particularly interesting critical viewpoint, that a scheme not designed to prioritise one group over another could still do so through its

application. It is a great example to give to staff to reflect on how to carefully implement a scheme which would require them to check their own biases.

Considering the content, this book would be valuable for library management tasked with writing an EDI policy, facing specific local issues or any library staff with an interest any aspect of equality and inclusion looking to formalise projects and viewpoints into suitable presentations for management consideration. It could also be included in library and information course reading lists and library collections as an initial reference book for these issues. As a practical guide it summarises the issues and refers to further reading suggestions for the theory and research behind the subjects so students could refer to the cited literature in any of the relevant sections.

Metadata & Discovery Group

Book review: Inclusive Cataloguing

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This book was first published by the American Library Association, with the UK edition published by Facet soon after, unsurprisingly therefore all the contributors are from the US, which often leads the way in cataloguing initiatives, but it would be interesting if Facet could also produce a complementary book featuring UK projects, or perhaps one with a more global approach. One of the editors, Amber Billey, notes that the murder of George Floyd in 2020 was a catalyst for many librarians to look at bias and oppression within their libraries, combined with the COVID 19 lockdowns which meant many were working from home and had the ability to shift their attention to diversity, equity and inclusion work. The book is divided into two sections – *History & Theory and Case Studies* – the first section putting the theme of inclusive cataloguing and metadata work into context, how and why it arose, and discussing the theories behind the work – with the practical examples in the second half.

There are some names which recur frequently in discussions about the history of inclusive cataloguing and classification – such as Dorothy Porter Wesley, Brian Deer, and Sandy Berman – and if these are unfamiliar to you, these introductory chapters will certainly enlighten you.

The chapter by Violet B. Fox & Tina Gross *This is the work: a short history of the long tradition of inclusive cataloguing – critiques and action* does exactly what it claims to do, and if anyone wanted to know a potted history of inclusive cataloguing work, this is an excellent piece that puts everything into context. From work in the 1930s and 1940s up to the 2020s, including the Cataloguing Code of Ethics (2021) we get an overview of library staff actively engaging in work against bias and prejudice. They also reflect on where we are now:

> "After an initial swell of interest in this work beginning in late 2020…cataloguing and metadata librarians are now at an inflection point, where we can choose to treat this work as a fad or a one-time task to

check off our to-do list, or we can choose to reinvest ourselves in the necessity of continuing this work." (p. 15)

I think the contributions to this current issue of Catalogue & Index certainly show that many of us are continuing to engage.

One chapter I found particularly interesting was Jill E. Baron, Violet B. Fox & Tina Gross – *Did libraries 'Change the Subject': What happened, what didn't, and what's ahead* as I think many of us were perhaps woken to the topic by the distribution of this film about students at Dartmouth College protesting the term 'illegal aliens', so finding out what the aftermath was proved to be educational.

Matthew Haugen and Michael L. Stewart's chapter *Gendered information and the Program for Cooperative Cataloguing* details the way gendered information has been dealt with by RDA and the PCC (Program for Cooperative Cataloging) over the last 10 years, including changes that have been mooted by practitioners wanting to move away from including gender information within catalogue records. They also note the issues that come with correcting data that may no longer sit in just one system, with the increasing use of linked data projects such as Wikidata.

Allison Bailund, Steven W. Holloway, Carole Sussman, & Deborah Tomaras - *From 'Afrofuturist comics' to 'Zombies in comics': inclusive comics cataloguing from A-Z* - note the problems inherent in cataloguing comics prior to recent years, with the lack of usable subject headings and restrictive rules. Even when improvements were made, they were often behind a paywall (such as the RDA Toolkit). This chapter details how the ALA Graphic Novels and Comics Round Table (GNCRT) Metadata and Cataloguing Committee created the *Best Practices for Cataloguing Comics and Graphic Novels using RDA and MARC21* documentation which is freely available and "...seeks to promote equity of description in comics metadata...providing guidance for cataloguing comics beyond American superhero titles." (p. 102) This includes advice on international and multilingual comics and assistance on locating metadata for different types of comics. With an increase in the breadth of subject headings for comics the Comics and Fiction Funnel was created in 2022.

B. M. Watson's chapter, *Critical cataloguing across GLAMS and beyond the Core: The Trans and Queer Metadata Collectives and the Name Change Policy Working Group*, moves away from celebrating the action of individuals and discusses three collectives which have advocated for change and developed best practices surrounding Trans and Queer metadata, and name-change procedures within publishing. They demonstrate that significant work can be done outside of the traditional institutions such as the ALA, highlighting: "...the importance of collective activism, cooperation, and ongoing efforts to challenge systemic barriers in technical services." (p.121)

Nineteen case studies are shared in the second half of the book, these range from descriptions of reparative subject heading projects undertaken at universities, to

creating a harmful language statement at a public library. From revisions of Library of Congress call numbers for Black People, to engaging with indigenous peoples to facilitate self-naming. There is a wide range of chapters detailing ways to make metadata more respectful and inclusive.

As Karl Pettitt states in the chapter, *A (Very) Select History of Inclusive Cataloguing*:

"Sometimes inclusive cataloguing involves attempts to modify current structures, while at other times it has involved creating completely new structures. In either case, the goal remains to create descriptive metadata that centers the viewpoints of the people or topics being described." (p.42)

I can highly recommend this book, for providing context and history to inclusive cataloguing and for illustrating the many ways that work has so far been achieved. This really should be read by everyone who works with metadata. There are many inspirational projects and studies, and overall you are left with the feeling that it is possible to do something, whether that be individually or collectively, and now is the perfect time to do so.