Faculty and Staff Publications – Milner Library   Milner Library

7-23-2021

Social Justice in Cataloging Annotated Bibliography

Jeremy Berg
University of North Texas, jeremy_berg@protonmail.com

Cathy Chapman
Saint Martin's University, CChapman@stmartin.edu

Gretchen Neidhardt
Chicago History Museum, gretchenneidhardt@gmail.com

Stephanie Porrata
The Ohio State University, porrata.2@osu.edu

Jennifer Young
Northwestern University, j-young2@northwestern.edu

See next page for additional authors

Follow this and additional works at: https://ir.library.illinoisstate.edu/fpml

Part of the Library and Information Science Commons

Authors

Jeremy Berg, Cathy Chapman, Gretchen Neidhardt, Stephanie Porrata, Jennifer Young, and Eric Willey

Social Justice in Cataloging Annotated Bibliography

Abstract: This article presents annotations by six authors for seventy-four English language books, articles, and theses and dissertations addressing ethical and moral issues in cataloging practice and theory. An initial list of potential works for annotation was created from the "Cataloging and Social Justice" post in the *Research about Cataloging and Assessment and more…* blog by Jessica Schomberg, and a Google Scholar search for works which cited *Prejudices and Antipathies: A Tract on the LC Subject Headings Concerning People* by Sanford Berman. Additional articles which the authors were already aware of or encountered serendipitously were also considered for inclusion. Works and their annotations were divided into four categories: Race, Ethnicity, and Nationality; Gender and Sexuality; Physical Characteristics, Ableism, Medical Conditions, and Disabilities; and Multiple Categories or General Discussion. Articles which the authors were not able to annotate due to other obligations and disruptions due to the COVID-19 Pandemic were included in the *Cataloging Ethics Bibliography* maintained by the Cataloging Code of Ethics Steering Committee.

Introduction

Creating metadata in library catalogs which is more inclusive and reflective of the language people use to describe themselves is an ongoing discussion in library and information studies literature and has been for at least five decades. As the topic has been discussed for some time and remains relevant it was determined that an annotated bibliography would be a valuable resource for students, researchers, and other people interested in the topic.

This annotated bibliography began as a project to describe resources listed on the "Cataloging and Social Justice" post in the *Research about Cataloging and Assessment and more…* blog by Jessica Schomberg.[1] In addition, a Google Scholar search for works which cited *Prejudices and Antipathies: A Tract on the LC Subject Headings Concerning People* by Sanford Berman was conducted, and the 324 items which cited Berman's monograph were examined for additional works which might be relevant. This search was conducted on 10 January 2020.

The large number of results presented a larger project than the initial investigator wished to undertake individually, and Eric Willey sent out a request for additional catalogers interested in the project to his personal Twitter account and the *Troublesome Catalogers and Magical Metadata Fairies* Facebook page. Jeremy Berg, Cathy Chapman, Gretchen Neidhardt, Stephanie Porrata, and Jennifer Young generously volunteered their time and expertise in providing annotations. The group of six volunteers communicated through email and Slack. Each member annotated between five and seventeen articles and examined further articles which were ultimately deemed out of scope.

---

[1] Schaumberg, Jessica. Research about Cataloging and Assessment and More…, "Cataloging and Social Justice," February 3, 2014, https://web.archive.org/web/20201006040408/http://catassessmentresearch.blogspot.com/2014/02/cataloging-and-social-justice.html

A number of works were written in non-English languages and excluded as the authors unfortunately do not have the expertise to evaluate their content accurately. Article selection of English language articles from this list was subjective, but in general the authors looked for articles which focused on cataloging in a MARC environment, and ethical or moral issues associated with that practice. Additional works were added if the authors personally became aware of them and found them to be relevant to the project. Ultimately, seventy-four books, articles, and thesis and dissertations were annotated and divided into four categories: Race, Ethnicity, and Nationality; Gender and Sexuality; Physical Characteristics, Ableism, Medical Conditions, and Disabilities; and Multiple Categories or General Discussion.

Even with a group working on the project there were a substantial number of works which fit the search criteria and could not be annotated. The group decided that annotating all of these articles was not practical, and in the spirit of "the perfect is the enemy of the good" it would be most beneficial to submit the existing annotations for publication with a list of possible additional relevant works. These additional, unannotated works were examined to see if they fit the overall selection criteria, generally by reading the abstract and skimming the article. Searches for the terms "catalog*", "metadata," "MARC," and "subject heading" were also used in longer works. Citations for these unannotated but likely relevant articles were added to the *Cataloging Ethics Bibliography* maintained by the Cataloging Code of Ethics Steering Committee.[2]

There are also certainly additional books and articles which were not located using this methodology, but which would have been within the scope of the project. This project was also limited to textual works, and there are many freely available webinars, talks, and podcasts which are valuable resources. It is the hope of the authors that others will build on their work, and provide further lists or annotations promoting these resources. Another way to expand on this project might be to create Wikidata or other linked data information for resources describing social justice in cataloging. For now, the authors hope that scholars will find this work useful in directly locating articles relevant to their research and practice and finding additional works by following citations in those articles.

Race, Ethnicity, and Nationality

Adamich, T. 2009. "Making and Managing Metadata in K-12: Foreign Language Cataloging, Non-Native English Speakers, and Equitable Access." *Technicalities* 29 (2): 7–10.

This article addresses why School Media Specialists and School Librarians should be thinking about equitable access in terms of their cataloging and metadata practices, specifically focusing on why foreign language cataloging is critical to the equal-access school library. Using Hispanic (or Spanish-speaking) populations as an example, the author argues that in order to serve all users, a card catalog must be accessible to those who do not know English. This article provides examples of subject-based sources for Metadata in Spanish and lists two best-practice examples of K-12 institutions that offer multiple language access. While a little old, this article

---

[2] Cataloging Code of Ethics Steering Committee, *Cataloging Ethics Bibliography,* https://docs.google.com/document/d/1bHtghhSL54PFIekIwnmHpF9O_2KR_GMq5GWIBgNLKDg/edit (accessed July 23, 2021).

will be helpful for School Librarians and Media Specialists and anyone new to multilingual metadata and cataloging practices.

-annotation provided by Stephanie Porrata, The Ohio State University

Adler, Melissa (2017). Classification along the color line: Excavating racism in the stacks. *Journal of Critical Library and Information Studies* 1.
http://libraryjuicepress.com/journals/index.php/jclis/article/view/17

Adler argues that "structures that were written in the late 19th and early 20th centuries are deeply embedded in our libraries." These structures have contributed to racialized assumptions and associations in society. As evidence Adler discusses how relevant sections of library classification about African Americans were built in relation to contemporary social and political agendas, beginning in 1876. Created in a context of evolutionary theory and principles, library classifications were then built around works by men who cited one another and whose scholarship became American history. Classifications and works specifically discussed are Charles Cutter's *Expansive Classification*, John Fiske's "A Librarian's Work," Melvil Dewey's Decimal Classification, and the Library of Congress Classification System. Adler concludes by offering suggestions for "taxonomic reparations" to undo or mitigate some of the damage caused.

-annotation provided by Eric Willey, Illinois State University

Adler, Melissa & Harper, Lindsey M. (2018). Race and ethnicity in classification systems: Teaching knowledge organization from a social justice perspective. *Library Trends* 67(1), 52-73.
https://muse.jhu.edu/article/706988

Adler and Harper discuss how the issues of social justice and diversity can be included in courses on information organization. The authors argue that categorization and classification are inherently connected to other areas of LIS research and practice, and that knowledge organization curricula can be used to demonstrate how classification affects circulation. Suggestions on how diversity and social justice lessons can be included in knowledge organization curricula are provided.

-annotation provided by Eric Willey, Illinois State University

Biswas, Paromita (2017). Rooted in the past: Use of "East Indians" in Library of Congress Subject Headings. *Cataloging & Classification Quarterly*
http://www.tandfonline.com/doi/full/10.1080/01639374.2017.1386253

Biswas clearly proves why the Library of Congress Subject Heading "East Indians" continues to be in need of cancellation and replacement. The heading, rooted in colonialism, lacks literary warrant and is not an accurate description of who the term is meant to represent. It is not even used or embraced by the community in question. In 2015, the Library of Congress Demographic Group Terms designated "Indians (India)" as the preferred term with a cross-reference from "East Indians". While recognizing that changing the term in LCSH also means changing the 21 related terms using "East Indians" the author demonstrates why it should happen.

-Annotation provided by Jennifer Young, Northwestern University

Chaikhambung, Juthatip & Kulthida Tuamsuk. (2017). Knowledge classification on ethnic groups in Thailand. *Cataloging & Classification Quarterly* 55(2), 89-104. http://dx.doi.org/10.1080/01639374.2016.1271074

Chaikhambung and Tuamsuk engage in qualitative research using the content analysis method to create an ontology describing the ethnic groups in Thailand. Their research first consists of engaging in content analysis of reliable secondary sources to identify the scope of knowledge. They then develop the knowledge classification and structure through grouping similar items and reducing repetitive terms. Finally, a snowball sampling technique is used to submit the knowledge structure for evaluation and confirmation by four ethnology experts. Expert recommendations are incorporated and research results are then used to document the knowledge scope and structure of the various ethnic groups in Thailand. This research may be of interest to those developing ontologies, especially ontologies related to ethnic groups.

-annotation provided by Eric Willey, Illinois State University

Cherry, Alissa and Mukunda, Keshav. "A Case Study in Indigenous Classification: Revisiting and Reviving the Brian Deer Scheme," *Cataloging & Classification Quarterly* 53, no. 5-6 (2015): 548-567. http://dx.doi.org/10.1080/01639374.2015.1008717

Cherry and Mukunda discuss the Union of British Columbia Indian Chiefs (UBCIC) Resource Centre's creation and implementation of a new revision of the Brian Deer Classification system (BDC), along with the release of a model and tools for other libraries to easily implement their own BDC revisions. Brian Deer originally created his systems (individual to institutions) to better address the flexible and relationship-based interconnected network of Indigenous knowledge structure.

If an institution with Indigenous works uses a system like Dewey or LCC, access to knowledge is hampered because Indigenous works are classified using Eurocentric systems that cannot adequately represent or organize them. Attempts to reform LCC and Dewey are changes to terminology alone, which is not enough. The structure itself is biased. The authors needed to reflect characteristics of Indigenous knowledge systems, including: holistic view of the world; "the land is our library"; and ethical and cohesive integrity to knowledge.

UBCIC looked at several versions of BDC and picked the elements that worked best. It widely goes from local to more broad; uses alliterative call numbers where possible; changes language to reflect Indigenous relationships; and architects consulted heavily on word choice and spelling. The revised system uses discrete call number sections: class, then cutters for format, people, places, and time (as needed). The goal is to keep it simple and memorable.

The article discusses the process of revision and mapping, along with the implementation process and challenges, and a reflection on the ever-changing nature of a classification system.

-annotation provided by Gretchen Neidhardt, Chicago History Museum

Coleman, A. (2016). Theology, race and libraries. Preprint submitted to the Proceedings of the Annual Conference of the American Theological Librarians Association, Long Beach, California. http://scholarworks.sjsu.edu/cgi/viewcontent.cgi?article=1090&context=slis_pub

Coleman argues that finding materials on anti-racism is very difficult because while there are plenty of headings for racism in classification schemas and electronic databases, none exist for active anti-racism. Classification schemas also lack intersectional headings, making it difficult to convey when resources are tying together, e.g., race, class, and gender. When combined with that fact that many classification schemas perpetuate institutional racism in their biases and vocabulary, it becomes clear that a new classification schema is necessary. To that end Coleman, partnering with a number of communities and using critical race theory, created a prototype anti-racism thesaurus. Since race is an artificial construct that lacks scientific or spiritual validity, her ultimate goal is to eliminate racism by eliminating race. She also discusses Christian theological aspects of race, including its creation in medieval Europe, total absence in the Bible, and types of Christian literature that are important for spreading anti-racism.

-annotation provided by Jeremy Berg, University of North Texas

Coleman, Anita. 2020. "Using the Anti-Racism Digital Library and Thesaurus to Understand Information Access, Authority, Value and Privilege." *Theological Librarianship* 13 (1): 1–12. https://doi.org/10.31046/tl.v13i1.560

In this article, Coleman provides an overview of her experience using both the ACRL Framework for Information Literacy and an Anti-Racism lens to identify shortcomings in our information infrastructures. The article is grounded in Coleman's work on the Anti-racism Digital Library and Thesaurus, which is indirectly used to show how information professionals can think critically about metadata like subject headings with the reminder that incorrect description and language can be harmful to communities. While the lack of appropriate Library of Congress Subject Headings about anti-racism is only briefly discussed, the Coleman's strength is in how anti-racism and the Framework for Information literacy can inform each-other. This article will be

of interest to information professionals interested in how the ACRL Framework for Information Literacy can inform our work outside of information sessions with students.

-annotation provided by Stephanie Porrata, The Ohio State University

Correa, Eda M., & Marcano, Nashieli. 2009. "Bibliographic Description and Practices for Providing Access to Spanish Language Materials." *Technical Services Quarterly*, 26(4): 299-312. https://doi.org/10.1080/07317130802679108

This article provides a practical guide for librarians and library workers who want to provide access to Spanish language materials in their collections due to increased demand for these items. Focusing primarily on Spanish language syntax, the Corea and Marcano provide guidelines and rules on how to approach initial articles, personal names, editions (and/or printings), subject access, and access and diacritics in cataloging. While this article may be difficult to read for those who are unfamiliar with grammar and syntax, the authors provide a simple yet thorough introduction using many examples of the concepts they introduce. Because this article is rooted in syntax and linguistics it will be most helpful to catalogers who have very little knowledge of the Spanish language to jump-start cataloging Spanish language materials at their institutions.

-annotation provided by Stephanie Porrata, The Ohio State University

Diao, Junli & Haiyun Cao. (2016). Chronology in cataloging Chinese archaeological reports: An investigation in cultural bias in the Library of Congress Classification. *Cataloging & Classification Quarterly* 54(4), 244-262. http://dx.doi.org/10.1080/01639374.2016.1150931

Diao and Cao discuss the issue of cultural bias and ambiguity towards Chinese chronology in the Library of Congress Classification (LCC) and the Library of Congress *Subject Headings Manual* (SHM). They use the classification of Chinese archaeological reports to demonstrate how the imposition of a Western world view on knowledge classification leads to unavoidable and obvious cultural bias as more non-Western materials are classified by Western libraries. For example, the authors discuss the cataloging of Chinese archaeological reports by the New York University based Institute for the Study of the Ancient World and how LCC's Stone Age, Bronze Age, and Iron Age categories fail to include a Jade Age relevant to China. As a solution, the authors recommend that archaeological reports and materials on Bronze China be classified based on the author's cultural identity, and that SHM H1225 be updated and include specific patterns for Chinese archaeological reports. This article may be of interest to researchers exploring cultural bias in cataloging practice.

-annotation provided by Eric Willey, Illinois State University

Duarte, Marisa Elena and Belarde-Lewis, Miranda (2015). Imagining: Creating Spaces for Indigenous Ontologies. *Cataloging & Classification Quarterly* 53(5-6), 677-702. http://dx.doi.org/10.1080/01639374.2015.1018396

Duarte and Belarde-Lewis examine how colonialism has resulted in standardization, misnaming, and other practices when cataloging and describing materials by and about Native American and Indigenous peoples. They propose that the decolonizing method of "imagining" can allow practitioners to better understand Indigenous community-based approaches to creating information structures. The authors urge non-Indigenous readers to use imagining to engage thoughtfully with reasons why Indigenous peoples might wish to develop their own approach to classifying their materials, and to step back from their own ideas about how knowledge should be organized. They also urge Indigenous readers to use imagining to help open themselves up to new possibilities in information organization. The article goes on to describe how imagining can be used in practice to create, implement, and support Indigenous ontologies. This paper is likely of interest to practitioners working with Indigenous people or materials (especially Native American communities) and Indigenous people working with colonial ontologies.

-annotation provided by Eric Willey, Illinois State University

Dudley, Michael. 2020. "Exploring Worldviews and Authorities: Library Instruction in Indigenous Studies Using Authority Is Constructed and Contextual." *College & Research Libraries News* 81 (2): 66–66. https://doi.org/10.5860/crln.81.1.66

In this short column, the author provides his experience with using the Information Literacy Framework's *Authority is Constructed and Contextual* frame in their Indigenous and Gender Studies instruction sessions to uncover biases within their Eurocentric classification and indexing schemes. The author offers many examples of how the Library of Congress Classification of Indigenous and LGBTQ persons is problematic and compares them to those found in EBSCO's Alternative Press Index (API). The author concludes by emphasizing how *Authority is Constructed and Contextual* can encourage students to understand authority with healthy skepticism. This column will be most helpful to those wanting a brief overview of the tension between Library of Congress Subject Headings and Indigenous persons and or/ to those interested in learning more about how the Framework of Information Literacy can be used to support equity, diversity and inclusion.

-annotation provided by Stephanie Porrata, The Ohio State University

Farnel, Sharon, Shiri, Ali, Campbell, Sandra, Cockney, Cathy, Rathi, Dinesh & Robyn Stobbs. "A community-driven metadata framework for describing cultural resources: The digital library north project," *Cataloging & Classification Quarterly* 56, no. 1 (2017): 1-18. http://dx.doi.org/10.1080/01639374.2017.1312723

This is a procedural paper on how the team (Farnel et al) designed metadata schemas and intake workflows for the Digital Library North Project, a digital library collaboration between the University of Alberta, the Inuvialuit Cultural Resource Centre and communities within the Inuvialuit Settlement Region in the Northwest Territories in Canada.

The paper largely describes the first few prototyping processes in 2015 and 2016, in which community considerations are taken heavily into account, including various levels of proficiency with the languages of the region, ability to input and output different scripts, and community-supplied metadata enhancement. The groups demonstrate a concentrated effort to meet communities where they were (community centers, festivals), and to take their feedback continuously into account when designing the digital library.

Metadata framework was Dublin Core with some custom fields (like dialect), and based on community feedback, the metadata schema can accommodate multiple contributors and multiple names for people and places, including both traditional and Christian names, but also variant spellings. The team used Omeka for digital library software.

This is a useful paper for those looking for a collaborative model for creating a shared digital library space, particularly for its discussion of the iterative nature of the metadata structure and display.

-annotation provided by Gretchen Neidhardt, Chicago History Museum

Hajibayova, Lala & Buente, Wayne. "Representation of indigenous cultures: Considering the Hawaiian hula," *Journal of Documentation* 73, no. 6 (2017): 1137-1148. https://doi.org/10.1108/JD-01-2017-0010

This article does a very credible job of discussing one aspect of Indigenous life, the Hawaiian hula, and how it is represented in various library and library-adjacent knowledge systems. Hajibayova and Buente discuss the major disconnect between the indigenous significance of hula and various tools of representation and organization, including Library of Congress subject headings and Dewey Decimal classification, among others. The known fact of Western and colonial bias in these tools is illustrated clearly, and the contextual information given about the example is incredibly helpful. Their suggestion is more decolonized practices in knowledge organization, but the solutions provided are not yet actionable.

-annotation provided by Gretchen Neidhardt, Chicago History Museum

Handis, Michael W. (2020). Greek Subject and Name Authorities, and the Library of Congress, *Cataloging & Classification Quarterly*, 58:2, 107-126, https://doi.org/10.1080/01639374.2019.1708523

Handis examines the differences in name authorities and subject headings created by the National Library of Greece (which still uses AACR2) and Library of Congress. Handis discusses differences between and biases in both cataloging systems for personal names as subjects, place names as subjects, and biases in subject headings. This article may be of interest to researchers examining the practices of national libraries, and practices of libraries who do not always use Library of Congress or NACO created terms.

-annotation provided by Eric Willey, Illinois State University

Higgins, Molly (2016). Totally Invisible: Asian American Representation in the Dewey Decimal Classification, 1876-1996, *Knowledge Organization*, 43:8, 609-621, https://doi.org/10.5771/0943-7444-2016-8-609

Higgins examines how the Dewey Decimal Classification system has historically represented materials describing Asian Americans in the historical context of the term. Through this research Higgins describes the lack of specific Dewey categories for racial and ethnic groups (they are grouped under "Ethnic and National Groups" in the 22nd edition of the DDC), and notes that lack of clear categories can discourage researchers from conducting new research. This can create a vicious cycle where a lack of literary warrant is incorrectly perceived as a lack of importance, leading to less scholarship or creative work on that subject. Noting that the DDC categories were (understandably when viewed in their horrible context) created without input from those they were meant to describe, Higgins concludes that accuracy and usefulness to the community they describe may be more important than mainstream acceptance when creating terms and recommends that communities be given more control over structure and definitions in KOS's. This article may be of interest to those examining race and ethnicity in historical or new KOS's.

-annotation provided by Eric Willey, Illinois State University

Howarth, Lynne C, and Emma Knight. 2015. "To Every Artifact Its Voice: Creating Surrogates for Hand-Crafted Indigenous Objects." *Cataloging & Classification Quarterly* 53 (5-6): 580–95. https://doi.org/10.1080/01639374.2015.1008719

In this article, the authors discuss a proposed rethinking of the role of surrogates for material items, calling for the consideration of meaning-makers in the process of creating surrogate records. The authors, recognizing the potential of material objects in the Native Canadian Centre of Toronto (NCCT) collection to evoke or provoke memory, foster narratives, surface life histories, and to ground identity took part in the Memory, Meaning-Making and Collections (MMMC) project. This project consisted of handling sessions and talking sessions with Aboriginal seniors and others part of the NCCT and uncovered how artifacts can give voice to individuals and communities, and this voice should be a part of how we approach surrogate creation for indigenous materials moving forward. This approach to cataloging can have

important implications when dealing with other diverse communities and collections. Information professionals interested in reconsidering their approach to surrogate creation will find this case study informative.

-annotation provided by Stephanie Porrata, The Ohio State University

Littletree, Sandra and Metoyer, Cheryl A. "Knowledge Organization from an Indigenous Perspective: The Mashantucket Pequot Thesaurus of American Indian Terminology Project," *Cataloging & Classification Quarterly* 53, no. 5-6 (2015): 640-657.
http://dx.doi.org/10.1080/01639374.2015.1010113

Littletree and Metoyer convincingly discuss the need to create a thesaurus for Mashantucket Pequot Thesaurus of American Indian Terminology and describe the process of creation in the mid-1990s. Initial conception included four domains: the Spiritual, the Physical, the Social and the Mental. The thesaurus embodied a relational way of being. Littletree and Metoyer describe the four phases of thesaurus creation: review existing source terminology; determine literary warrant; structure vocabulary; and refine and finalize.

The authors do have a small section describing the need for this project and previous efforts, but almost no North American Indigenous prior projects are discussed, including the work of Brian Deer. The authors are persuasive that the project has a longer history and backing - there are many Indigenous thesauri created in response to national (Library of Congress) vocabularies being unsatisfactory and hostile, but again, several key North American projects are not explicitly acknowledged.

The authors discuss the phases of the project and its application in an opening exhibit for the Mashantucket and Pequot Museum and Research Center in 1998. This is an illuminating discussion, but curious for a paper published in 2015. The latest development with a date listed is a note saying "As of November 2005, approximately 20,000 terms had been analyzed and an additional 12,000 terms describing tribal names had been identified. The remaining phase of the Thesaurus Project is a pilot test to determine its accuracy and utility." There is no update given from then until publication in 2015, which seems odd.

-annotation provided by Gretchen Neidhardt, Chicago History Museum

Lougheed, Brett, Moran, Ry and Callison, Carmille. "Reconciliation through Description: Using Metadata to Realize the Vision of the National Research Centre for Truth and Reconciliation." *Cataloging & Classification Quarterly* 53, no.5-6 (2015): 596-614. Accessed November 4, 2020.
http://dx.doi.org/10.1080/01639374.2015.1008718

Canadian residential schools tried to wipe out the culture of Indigenous children and frequently abused them. The Truth and Reconciliation Commission of Canada archives church and state

documents and oral histories from school survivors. They face two main metadata challenges: the documents and histories are in multiple metadata systems, and including Indigenous people in creating classifications, especially since their view of knowledge differs from Eurocentric systems. It is also important to include as much Indigenous-made content as church and state materials. To achieve these goals, all concerned parties must be involved in the discussion of how to do participatory archiving the right way. The archive also needs to organize everything while still making it accessible to lay people. Right now the archive cannot be browsed, which is an problem. The best search method may be to start searches with a Google-style single box, followed by facetable results.

-annotation provided by Jeremy Berg, University of North Texas

Shoki, Godwin E., & Oyelude, Adetoun A. "Cultural and linguistic barriers to information retrieval and dissemination." *IFLA Conference Proceedings* (2006): 1-15. Accessed November 4, 2020. http://archive.ifla.org/IV/ifla72/papers/145-Shoki_Oyelude-en.pdf

Libraries have a responsibility to make information retrieval as easy as possible for patrons, and this includes addressing cultural and linguistic differences. Nigeria uses the Dewey Decimal System and Library of Congress classification for public and academic libraries, respectively. The authors question whether these are really the best choices, or if their use has simply become a matter of habit based on librarian culture. Since trained researchers know how to use the catalog, they have trouble empathizing with users. For this reason, in addition to librarians, the authors surveyed 20 patrons from each library they contacted, who generally expressed difficulty with the current system. Language is another issue, since different areas of Nigeria have different dominant languages and levels of exposure to mixed culture. Some patrons have suggested that all librarians should be required to learn a second language. Classification is meant help people get information—if it acts as a barrier instead, it needs to be changed.

-annotation provided by Jeremy Berg, University of North Texas

Steeves, Paulette (2017). Unpacking neoliberal archaeological control of ancient indigenous heritage. *Archaeologies: Journal of the World Archaeological Congress* 13(1), 48-65. https://doi.org/10.1007/s11759-017-9312-z

While this article primarily focuses on the treatment of the Indigenous peoples of the Western Hemisphere, there is much that libraries can take away from it. Steeves discusses how archeologists have historically ignored evidence of the history of the Indigenous people existing in the Americas prior to the generally accepted 11,000-12,000 years ago and how this fits into a colonial New Worlds viewpoint. This erasure affects how libraries describe and classify materials related to these peoples. She mentions talking to her academic library about how they have classified a culture called the Clovis among other Indigenous peoples when numerous archaeologists dispute them ever having existed as a distinct culture. Regardless, this article

provides a framework for looking at how libraries and librarians treat the Indigenous peoples of the Western Hemisphere.

-annotation provided by Jennifer Young, Northwestern University

Strottman, Theresa A. (2007). Some of our fifty are missing: Library of Congress Subject Headings for southwestern culture and history. *Cataloging & Classification Quarterly* 45(2), 41-64. http://www.tandfonline.com/doi/abs/10.1300/J104v45n02_04#.Uu_kNPldWSo

Using Antonio Gramsci's concept of hegemony framework, Strottman shows the American East Coast bias in the development of LCSH and how it continues to be perpetrated today. Many subject headings related to the Southwest give short shrift to history, events, and peoples prior to becoming incorporated into the United States. Headings about Indigenous peoples of the area and their languages are an inconsistently applied tangle of broader/narrower terms – even subdivisions are not applied uniformly. Some of these inadequacies have been addressed since the publication of this article in 2007 (Ox carts is a cross-reference to Bullock carts, Churros now have a heading as Navajo-Churro sheep) but many more still need to be addressed.

-annotation provided by Jennifer Young, Northwestern University

Turner, Hannah. "Decolonizing Ethnographic Documentation: A Critical History of the Early Museum Catalogs at the Smithsonian's National Museum of Natural History," *Cataloging & Classification Quarterly* 53, no. 5-6 (2015): 658-676. http://dx.doi.org/10.1080/01639374.2015.1010112

This paper examines the historical importance and impact of museum cataloging, and suggests ways for it to be more flexible. This work focuses on the Anthropology department at the Smithsonian's National Museum of Natural History. In particular, Turner is concerned with Indigenous materials and representation, particularly as many items and knowledges came into the collection as colonized material. Changing ethics and views in museums ask us to reexamine our own practices, including decolonization. How do we adjust legacy languages and practices to eliminate a Euro-centric viewpoint? Further complicating the issue for museum catalogs is a lack of industry standards - many museums use their own systems and vocabularies, and there is rarely standardization amongst institutions.

The author is not suggesting a complete overhaul at the Smithsonian, but rather an investigation of previous practices to see where there is room for change. This is a very fine line. It was quite interesting to see the data points collected over time for collection items - context was seemingly not very important (and has been difficult to construct in retrospect). Turner concludes with the excellent point that decolonial practice often fails because Indigenous voices

are included in narratives and descriptions, but not in how the records themselves are organized. Our categories of description are also culturally constructed, even though they're often seen as objective.

-annotation provided by Gretchen Neidhardt, Chicago History Museum

Willey, Eric and Yon, Angela. "Applying Library of Congress Demographic Group Characteristics for Creators," *Cataloging & Classification Quarterly* 57, no. 6 (2019): 349-368, https://doi.org/10.1080/01639374.2019.1654054

This paper discusses a pilot project to add "African American," a Library of Congress Demographic Group Term, as a faceted search item to records in Illinois State University's library system. The project staff added this term to authority records, and in part, used Wikipedia's list of African American writers to verify identities. This initial project was grant funded, and the paper discusses the workflow of the graduate student expert hired to verify identities and supplement authority information.

The discussion of difficulties in this project is illuminating for similar work, especially the shortcomings of Wikipedia and how those could be addressed as early stages of a similar project. There is also a nuanced discussion of the shortcomings of using these types of labels, particularly as concerns African Americans. It would have been helpful to see more discussion of the negative aspects of demographic labeling.

-annotation provided by Gretchen Neidhardt, Chicago History Museum

Gender and Sexuality

Adler, Melissa (2009). "Transcending Library Catalogs: A Comparative Study of Controlled Terms in Library of Congress Subject Headings and User-Generated Tags in LibraryThing for Transgender Books." *Journal of Web Librarianship*, 3(4), 309-331. https://doi.org/10.1080/19322900903341099

In Adler's first peer-reviewed article, written while still a Ph.D. student, Adler reviews the terms used to describe twenty transgender books. Adler compares the controlled vocabulary of Library of Congress Subject Headings (LCSH) to user-generated tags (aka folksonomies) in LibraryThing, an online resource which allows users to catalog their own books.

One goal of the study was to "provide insight into the significance of the power of a user community to name it's own resources," (p. 310) in addition to or instead of the naming and classification by the hetero-normative, Anglo-centric, mainstream Library of Congress.

Adler discusses the theoretical framework, methodology, and data analysis behind the study, as

well as case studies, and provides thorough definitions of transgender, controlled vocabularies, and folksonomies. The sections on LCSH and folksonomies include advantages and limitations of each, and the article includes a bibliography and appendix listing the books used in the study.

Significantly, less than a quarter of books in the study were assigned the LCSH "Transgender people" in WorldCat while over three-fourths of the books had "transgender" as a user-defined tag in LibraryThing. Adler concludes that "alone, neither folksonomies nor controlled vocabularies are completely effective," (p. 328) and suggests integrating tagging systems into OPACs for a "hybrid metadata ecology" (p. 328) to capitalize on the precision and findability offered by LCSH and Library of Congress Classification, and the more flexible, dynamic and representational user-generated tags.

There is at least one minor error or inaccuracy in the article-- discovered when looking up current LCSH. Adler states that as of the writing of the article in 2009, the term "Drag queens" (submitted as a subject proposal in 2005 by Sanford Berman), had not yet been authorized. While it is true that Drag queens was not an authorized heading, it was a USE reference (aka variant heading or general see reference) for [Female impersonators](#), which was established in February 2006. Both Drag queens and Drag kings were changed from USE references to separate headings in 2021. Another possible inaccuracy-- Adler states that WorldCat is a "collective catalog of 69,000" libraries from around the world. According to [OCLC](#) there are currently 15,637 member libraries.

The article, [cited by 68 according to Google Scholar], is still pertinent, highlighting the continuing need for modifications in LSCH and Library of Congress classification-- and for integrating folksonomies into OPACS for a more dynamic, user-defined representation.

-annotation provided by Cathy Chapman, Saint Martin's University

Adler, Melissa (2015). "'Let's not homosexualize the library stacks': liberating gays in the library catalog." *Journal of the History of Sexuality*, vol. 24, no. 3, 2015, p. 478-507. http://dx.doi.org/10.7560/JHS24306

It is becoming increasingly acknowledged that "libraries play a critical role in the lives of the reading public, and the labels and arrangements by which access is granted affect readers' experience." (p. 483). This article focuses on cataloger activists in the 1970s and 80s who successfully persuaded the Library of Congress to revise its authorized subject headings, as well as the classification or shelf arrangements, for materials on homosexuality. Among the cataloger activists mentioned are Sanford Berman, Barbara Gittings, Hope Olson, Joan Marshal, Steve Wolf, Eugene Frogio, and J. Mitchel McConnell, as well as the Task Force on Gay Liberation of the American Library Association (ALA).

Adler used "documentary evidence, particularly correspondence with and about the Library of Congress." (p. 479), and looks at Library of Congress authority and bibliographic record cards,

as well as the 1910 LC classification for HQ71-79. All bibliographic references are included as notes. Adler includes anecdotes of accidental discoveries-- both positive and negative-- while browsing shelves, or searching in catalogs. A misshelved book with queer characters and storylines. Books about homosexuality correctly shelved alongside books on child molestation.

Adler explores two changes in particular-- removing the term Homosexual from the broader subject heading and classification "Sexual perversion," and authorizing the LCSH "Gay" to be used for "nonclinical topics." (p. 480).

While some progress has been made, much work still needs to be done. There are systemic barriers to change-- the long-established heteropatriarchal (p. 502) and "heteronormative knowledge structures," (p. 479) the silenced and absent voices of minorities, and the continued, problematic shelving of materials on homosexuality being shelved based on outdated classification systems.

The article would be of interest to catalogers and other librarians, as well as those studying or interested in Gender and Identity Studies.

-annotation provided by Cathy Chapman, Saint Martin's University

Billey, Amber, Drabinski, Emily and K. R. Roberto. (2014). What's gender got to do with it? A critique of RDA 9.7. *Cataloging & Classification Quarterly* 52(4), 412-421. http://dx.doi.org/10.1080/01639374.2014.882465

Resource Description and Analysis (RDA), published in 2010 and implemented by Library of Congress, introduced several new components to allow for including additional contextual information about people in personal headings. Rule 9.7 directs catalogers to record gender for a person-- which the authors state "reinforce[s] regressive conceptions of gender identity."   The authors also note that RDA does not direct catalogers to record ethnicity.

The authors begin by sharing an experience in which a cisgender woman did not want her gender recorded in the authority record that was being created for her. She couldn't understand why in the world the information mattered or was asked for, stating that "gender was simply not an important aspect of the work." This experience highlighted several issues with RDA 9.7, most notably that "had the cataloger not known that the author didn't want to disclose gender, they would have included that information in her authority record." Disclosing gender can also potentially "out" someone.

Following Library of Congress guidelines, a "feminine" or "masculine" name is enough to base gender identity on. Even more problematic, an LC trainer stated that gender is determined by one's "physical equipment," and suggests catalogers can "determine" an author's gender based off of photos.

Another troublesome aspect of the rule is that 9.7 only allows catalogers to select from two gender categories-- male or female. This essentially denies the existence of transgender and non-binary people, among others. Rule 9.7 also assumes that gender is permanent and unchanging, rather than potentially fluid and non-linear.

Because gender is not a core or required attribute in RDA, and determining and recording gender is problematic, the authors fail to see why LC is training catalogers to routinely include gender as an element, and request that RDA 9.7 is rescinded.

-annotation provided by Cathy Chapman, Saint Martin's University

Billey, Amber and Drabinski, Emily (2019). Questioning Authority: Changing Library Cataloging Standards to Be More Inclusive to a Gender Identity Spectrum. *TSQ* (2019) 6 (1): 117–123. https://doi.org/10.1215/23289252-7253538

The article touches on bias in the organization of materials, noting that Library of Congress Classification "shelves materials about bestiality near those of transgender people…" (p. 118). However, the focus of the article is on Name Authority Files and gender bias, in particular as related to the current cataloging standards found in Resource Description and Access (RDA)-- and the efforts of library activists such as Amber Billy, Emily Drabinski, and K.R. Roberto to address and challenge the binary bias in the original RDA Instruction 9.7.

There is some awkward, confusing phrasing at the beginning of the article [and replicated in the abstract] while talking about libraries adding "surrogate" records for each item added to a library's collection: "To get this record, the library will either download it *or create a record for the book from an international bibliographic record database*." (p. 117). This could of course be easily remedied with "the library will either *create a record for the book or download it* from an international bibliographic record database." The second sentence is also unclear-- [The use of metadata schemes] "is foundational to-- and inextricable from-- *the library project*." (p. 117). With these exceptions, the article-- written for a more general [versus professional librarian] audience-- nicely summarizes cataloging and metadata, and includes a precise timeline of the "evolution of library cataloging standards." (p. 117-119).

-annotation provided by Cathy Chapman, Saint Martin's University

Campbell, Grant (2000). Queer Theory and the Creation of Contextualized Subject Access Tools for Gay and Lesbian Communities. *Knowledge Organization* 27. http://www.ergon-verlag.de/tocs/ko/27_2000_3.pdf

Campbell explores the debate among knowledge organization theorists about whether there is a true difference between "aboutness" and "meaning," and its significance for subject analysis-- and subsequent access points-- particularly for LGBTQ communities.

As Campbell notes, identifying subject content of a document is highly subjective, even more so for imaginative works such as fiction due to the "ambiguous boundary between content and interpretation." (p. 124). Recognizing the complex distinctions between the two can be used as a strategy to improve "consistent and replicable indexing" (p. 125)-- and could perhaps be used to identify whether there is LGBTQA content in literary works.

Campbell uses Billy Budd to test this, first summarizing the work, noting that even this "distort[s] the text into an interpretation, by virtue of the plot details it chooses to omit." (p. 125). Adding a quotation to supplement the summary can aid in looking for innuendo, which can be particularly important for works with hidden LGBTQ content.

Campbell also looks at past and more contemporary criticism and interpretation of Billy Budd. One notable contemporary critic is Eve Kosophsky Sedwick, who dedicated a chapter on Billy Budd in her second book on male homosexuality in literature. Campbell states that Sedwick's importance as a critic is due to the theoretical framework used to interpret literary works-- though Sedwick has faced opposition for her work as she "is not a gay man" and therefore she "speaks from outside the community, … disempower[ing] that community." (p. 127).

Lastly, Campbell looks at binarisms, focusing on three-- "essentialist vs. constructive views," "minoritizing vs. universalizing views," and "aboutness and meaning." (p. 128-129). Campbell concludes that classification theory can be improved by learning from other fields, and by acknowledging the ambiguities and complexities of the binarisms to create and implement better subject access tools. Includes bibliographical references (p. 130-131).

-annotation provided by Cathy Chapman, Saint Martin's University

Colbert, J.L. (https://orcid.org/0000-0001-5733-5168) (2017). Comparing Library of Congress subject headings to keyword searches involving LGBT topics: A pilot study. Graduate thesis. https://www.ideals.illinois.edu/handle/2142/97437

In the introduction, Colbert outlines some of the challenges of serving underserved populations such as the LGBT community-- lack of relevant materials-- or the assumption that there will be a lack of relevant materials-- and problematic Library of Congress Subject Headings [LCSH]. As Sanford Berman has pointed out, LCSH can be oppressive and offensive-- as well as unhelpful, using terminology which is not used by the population being described. Colbert's literature review focuses on the "history of LGBT subject access and information retrieval from mid-20th century until present." (p. 10).

Colbert's graduate thesis used "semi-structured interviews" to gather data, including "natural search language" used to search for LGBT topics, which was then compared to LCSH. Unsurprisingly, vocabulary used in searches by library patrons differs from controlled, authorized LCSH, though the participants-- four professors and research faculty-- were still fairly successful in finding materials due to prior research experience. One aim of the study was to

compile a user-language sample which could then be used to aid in updating LCSH, as well as suggesting keywords for use in reference interviews.

This brief thesis [64 pages] is quite readable and would potentially be of interest to both cataloging and reference librarians, as well as Gender and Identity Studies researchers.

-annotation provided by Cathy Chapman, Saint Martin's University

Drabinski, Emily (2013). Queering the catalog: Queer theory and the politics of correction. *The Library Quarterly: Information, Community, Policy* 83(2), 94-111. http://search.ebscohost.com/login.aspx?direct=true&db=lls&AN=86140717&site=ehost-live

"Libraries are spaces where language really matters." (p. 94). Drabinski shares aspects of the history of cataloging activists such as Sanford Berman, A.J. Foskett, Steve Wolf, and Joan Marshall in criticizing and critiquing Library of Congress Classification and Subject Headings, noting that these activists hold "one core belief"-- that LCCN and LCSH "are often wrong and should be corrected." (p. 100). Using queer theory, Drabinski contests the validity and viability of the notion that Library of Congress's classification and subject headings can ever be truly and permanently revised-- and whether these should be corrected.

Library classification is essentially considered to function as a "shelf address," so potential bias isn't as conspicuous as subject headings-- until a user is browsing the shelves. Drabinski shares the example of an autobiography which was initially shelved under RC560.G45-- "*Sexual and psychological conditio*ns, suggest[ing] that transsexuality is a psychological disorder that can be remedied…" (p. 98), and then the reissue was assigned HQ77.8 J67, emphasizing the "social aspects" of transsexuality.-- [the overarching "theme" of the HQ section is "The Family. Marriage. Women" (Classification Web, LCC browse)]. The bias of some Library of Congress Subject Headings is more evident, and cataloging activists have been successful in their efforts to fix problematic LCSH.

However, these successes have "the unintended effect of implicitly affirming the possibility that library classification and cataloging" (p. 106) is unbiased and "correct." Drabinski suggests employing public service librarians to implement a "queer approach to instruction [that] would shift from simply teaching the user to navigate LCC and LCSH" to teach the user how to think critically about OPAC search results-- what is "seen"-- and not seen, "developing a capacity for critical reflection about subject language and classification structure," (p. 107) which could be applied as new ways to think and teach in other disciplines about the discourse of power.

Cited by 157 according to Google Scholar.

-annotation provided by Cathy Chapman, Saint Martin's University

Drucker, Donna J. (2017). How subjects matter: The Kinsey Institute's Sexual Nomenclature: A Thesaurus (1976). *Information & Culture: A Journal of History* 52(2), 207-228. https://muse.jhu.edu/article/658180

Drucker provides a history of the development of *Sexual Nomenclature* as well as an analysis of its impact both inside and outside of the Kinsey Institute. Originally designed for internal use, the thesaurus is not widely held in print format and its integration into Indiana University's online catalog provides no guidance for users. The thesaurus could have a wider impact in regards to materials not adequately represented (or even represented at all) by Library of Congress Subject Headings if it were more easily available. The thesaurus is only available in either hardcopy or ebook form in the 1976 edition. The Kinsey Institute has an internal-use only edition updated in 2015 further limiting its external reach. The author also discusses the potential power in challenging notions of identity and power dynamics that broader access to the thesaurus could provide.

-annotation provided by Jennifer Young, Northwestern University

Johnson, Matt (2010). Transgender subject access: History and current practice. *Cataloging & Classification Quarterly* 48(8), 661-683. http://dx.doi.org/10.1080/01639370903534398

Johnson looks at three LGBTQA* thesauri and compares "their treatment of transgender and related topics" to Library of Congress Subject Headings (LCSH): [Dee] Michel thesaurus ; Internationale Homo- en Lesbisch Informatiecentrum en Archief (IHLIA), aka International Gay and Lesbian Information Center and Archive ; and EBSCO's LGBT Life. Johnson includes the Mitchel thesaurus even though it is rather dated as it "has the distinction of being the first widely known" thesaurus. Using 5 scholarly LGBTQA* encyclopedias, Johnson considers the treatment of the following terms in the thesauri and LCSH: transgender, transexual, intersex, transvestism and cross-dressing, drag, butch-femme, and androgyny.

Johnson concludes by pointing out the "formidable problems for ongoing authority control," particularly in subject areas-- such as LGBTQA*-- with ongoing changes in terminology. Noting "changes to headings with a long lineage in the authority file engender a concatenation of corresponding changes in thousands or perhaps tens of thousands of bibliographic records." (p. 675). Like Melisa Adler, Johnson proposes including user-generated vocabularies (aka social tagging or folksonomies) to improve access. Following the bibliographical notes is an appendix with "transgender term trees" (p. 677) for LCSH (as of October 1, 2009) ; Michel (as of 1990) ; and EBSCO's LGBT Life (as of 2006). While Library of Congress is notoriously slow in changing headings, there have indeed been some notable changes since 2009-- the authorized term Transgenderism is now a "See reference" for Gender nonconformity, and Transvestism is now a See reference for Cross-dressing.

-annotation provided by Cathy Chapman, Saint Martin's University

Olson, Hope A. and Ward, Dennis B. (1997). Ghettoes and diaspora in classification: Communicating across the limits. In B. Frohmann (Ed.), *Communication and information in context: Society, technology, and the professions* (*Proceedings of the 25th Annual Conference/Association canadienne des sciences de linformation: Travaux du 25e congres annuel*) (pp. 19-31). Toronto, Ontario, Canada: Canadian Association for Information Science.

The authors examine the *Dewey Decimal Classification (DDC)* system and the difficulties it has in describing marginalized knowledge domains, specifically women's studies and feminism. Hope and Ward suggest that imperfect systems, rather than being perfected, be made permeable to excluded voices. Domain analysis is used to map a subset of terms from *A Woman's Thesaurus* to terms *DDC* on a term-by-term basis. Research assistants then use guidelines developed by the authors to derive *DDC* classification numbers, essentially creating a feminist index to *DDC*. A then in development software system is also described, with the goals of recording links between information, a thesaurus maintenance system, and providing access to researchers. Preliminary findings from the study suggest that statistical analysis of term mapping may not be useful because of the relative importance of various terms in gender studies, and the evolving nature of vocabularies means some terms may become obsolete. Also of concern is diasporization of multidisciplinary topics in *DDC*, which arranges materials by discipline rather than topic, and working through the inherent biases of *DDC* as a product of the society it was created in. This study may interest researchers examining linked data, especially mapping library systems to controlled vocabularies describing marginalized communities.

-annotation provided by Eric Willey, Illinois State University

Olson, Hope A. (2007). How we construct subjects: A feminist analysis. *Library Trends* 56(2), 509-541. https://www.ideals.illinois.edu/bitstream/handle/2142/4586/Olson562.pdf?sequence=2

Olson looks at and critiques traditional "universal," hierarchical classification and subject headings-- which are based on Aristotelian logic/syllogistic reasoning and "designed for a straight, white male, Christian norm." (p. 519-520). Olson touches on Joan K. Marshall's 1972 writings about exclusions in Library of Congress Subject Headings (LCSH)-- such as including headings for "Mentally ill" women, children, and older people, while there is no heading for mentally ill men. There are also no LCSH for unpaid work, and in fact "Labor" is a narrower term under "Manpower." Sanford Berman has also been protesting the exclusion of topics relating to women in LCSH since the early 1980s.

Feminist analysis calls for creating alternative models, specifically including women in the established, traditional Aristotelian logic ; and entirely rejecting traditional logic for a new model. Olson suggests combining the advise of various feminist analyses and adopting multiple models: "these approaches need not be mutually exclusive, especially … with a … rejection of universality." (p. 522). One approach would be to add a web of relationships and connectedness to the established hierarchy. This will aid in "retrieval aboutness"-- search terms researchers are

likely to use. This will also aid in differences in search techniques and browsing styles due to language backgrounds as well as gender.

Olson also mentions potential solutions-- "traces of connectedness." Some offered by Functional Requirements for Bibliographic Records (FRBR) as well as Universal Decimal Classification (UDC): including more flexibility in recording associative relationships (aka Related terms) versus relationships which are simply hierarchical ; further connectedness provided by FRBR in the entity-relationship model ; and collaborative tagging (aka folksonomies).

While parts of the article can be confusing, Olson raises some interesting points and offers some intriguing solutions to improve library catalogs.

-annotation provided by Cathy Chapman, Saint Martin's University

Olson, Hope A. (2002). If it's there, can you find it? Bibliographic control. *Information sources in women's studies and feminism*. München: K.G. Saur, 100-114.

In a 1992 study Olson found three problematic issues in Library of Congress Subject Headings (LCSH) in relation to women's studies: androcentrism (aka male as norm), the interdisciplinary nature of women's studies, and feminist research's distinctive outlook.

Androcentrism: There is a plethora of women's headings compared to male headings. For example there are the headings "Women scientists" and "Women judges," but no equivalent "Men scientists" or "Men judges"-- it is implied that male scientists and judges are the norm while females in the same field are the exception. When there are male-specific headings, these tend to be for subordinate or less desirous roles-- e.g. "Male prostitutes," while "Female prostitutes" or "Women prostitutes" are "see" references for the LCSH "Prostitutes."

Interdisciplinarity: Women's studies often look at a wide range of issues-- for example including gender, race, and class in the same work. Subject headings generally represent a single aspect, necessitating numerous headings-- and a familiarity with implementing Boolean logic while searching. There can also be the issue of "under-cataloging" such as using only generic subject headings even when more specific headings are available.

Distinctive outlook: Feminist and women's studies are taken less seriously than "mainstream" topics. It can be difficult to find representative subject access, often resulting in marginalization. One example-- "concubinage is in the same number as dating in DDC." (p. 104). Library of Congress Classification often separates materials on women from the multidisciplinary topic-- say, shelving "Women in art" in a different location from works on art.

After outlining the main issues in LCSH and women's studies materials, Olson offers possible solutions. Some proposed solutions to poor subject access due to applying "mainstream" standards include linking specialized vocabularies with LCSH, and perhaps using these

vocabularies to adapt LCSH and LCC. Olson also offers search tips such as using "targeted browsing," a range of terms in searching, and learning Boolean techniques. Olson concludes with the reminder "that knowledge organization is not a neutral act, that is does shape our thinking." (p. 112).

-annotation provided by Cathy Chapman, Saint Martin's University

Roberto K.R. 2011. "Inflexible Bodies: Metadata for Transgender Identities." *Journal of Information Ethics* 20 (2): 56–64. https://doi.org/10.3172/JIE.20.2.56

In this article, Roberto wants readers to acknowledge the ways in which our traditional cataloging methods enforce normative boundaries for gender and queer sexualities, and the harm this causes to transgender library users. To ground this thesis, Roberto starts broadly by explaining the nuances of identities and the difficulty in capturing their fluidity in our cataloging models. There is discussion of the following terms as they relate to Library of Congress Subject headings: "queer", "sexual minorities", "transgender people" as an umbrella term, "drag performers" and "genderqueers". The breakdown of how these terms do and do not show up in Cataloging Models like Library of Congress Subject Headings is followed by Roberto's dive into a critique of how both Dewey Decimal System and Library of Congress Classification for transgender people at best suffer from neglect and at worse abandon them. Ultimately, Roberto calls for us to acknowledge that subject headings are subjective, identities can be temporary and overlapping, and that we should continue to both propose new language and rethink what subject headings mean. Written in 2011, this article is an important read to understand the changes (or lack of changes) to Library of Congress Classification and Dewey Decimal System in regards to transgender identity. Those interested in critical cataloging will find this article especially helpful in thinking about how we might think about revising our cataloging models and the importance of continued revision to avoid further harming individuals.

-annotation provided by Stephanie Porrata, The Ohio State University

2016 Report of the PCC Ad Hoc Task Group on Gender in Name Authority Records

https://www.loc.gov/aba/pcc/documents/Gender_375%20field_RecommendationReport.pdf

The PCC Ad Hoc Task Group on Gender Name Authority Records was formed on August 1, 2016 to address concerns raised about best practices for recording information about gender in name authority records (NARs), in MARC Authority Field 375, per RDA 9.7. The group was led by Paul Frank and worked with K.J. Rawson, director of the Digital Transgender Archive.

Beyond the preliminary work, because "gender identities and categories represented by LCDGT terms are intersectional and contextual, existing and future terms not already considered by the Ad Hoc group justify further consideration. For example, female and male impersonators are

given as narrower terms for Transgender people, with scope notes to Transvestites. The Ad Hoc committee feels that such terms "belong in the occupational category rather than the gender category." (p. 20-21).

In summary, the group recommended (p. 2):

> DCM-Z1 375 (Appendix A) be revised. Use a subset of the LCDGT terms including Females, Gender minorities, etc. ; record additional controlled AND uncontrolled terms as required ; and to record dates associated with gender identity ONLY WHEN the person for whom the NAR is being created explicitly provides the dates.
>
> Add an LC-PCC PS for 9.7.1.3 (Appendix B) directing users to the DCM Z1 375 text; reinstating a reference to record sources of information used (8.12.1.2); refer to instructions to record biographical information (9.17).
>
> Add and revise list of gender terms in LCDGT (Appendix C). Allow proposals for terminology needed for future NARS; update DCM Z1 list with proposed key terms to provide more specific and representative language.

This report was referenced in Billey [et al.'s] "What's gender got to do with it?" about RDA 9.7.

-annotation provided by Cathy Chapman, Saint Martin's University

Physical Characteristics, Ableism, Medical Conditions, and Disabilities

Angell, Katelyn, and Charlotte Price. 2012. "Fat Bodies in Thin Books: Information Bias and Body Image in Academic Libraries." *Fat Studies* 1 (2): 153–65.
https://doi.org/10.1080/21604851.2012.641895

In this article, the authors argue that the current classification practices for the discipline of Fat Studies are oppressive and inaccurate, citing practical and cultural inaccuracies of the current available subject headings, lack of appropriate subject headings, and the inappropriate Library of Congress call number classification of material within the field of Fat Studies. Using *The Fat Studies Reader* as a starting point, the authors demonstrate how this book was cataloged under Library of Congress call number RC (Internal Medicine) and argue that based on the introduction, should instead be cataloged under HM (Sociology). The authors then expand their scope, investigating 23 books listed on a Fat Studies bibliography noting their call numbers and first two subject headings assigned to them. The authors found that 17/23 books were found in the R LC call number range (for Medicine), and the remaining 5 were split across BF, E and KF LC call number ranges. Throughout the paper, the authors force readers to question the assumption that scholarly work is unbiased and objective, and that it is just as important to question how information retrieval structures can be biased. Readers will have a better understanding of how bias can affect both information retrieval and an academic discipline. This article will be of interest to those interested in Fat Studies and critical cataloging.

-annotation provided by Stephanie Porrata, The Ohio State University

Copeland, Clayton A. "Library and information center accessibility: The differently-abled patrons perspective," *Technical Services Quarterly* 28, no. 2 (2011): 223-241. http://dx.doi.org/10.1080/07317131.2011.546281

This article by Copeland uses qualitative analysis from in-depth interviews with five people who have different experiences with disabilities, including physical and virtual access and usability. The following themes are discussed: love for libraries and reading; disability as a socially-constructed phenomenon; physical limitations and barriers to library accessibility and services; technology and adaptation; and legislative compliance versus compassion.

The literature review acknowledges the social construction of disability, and explains the critical qualitative research framework. Four of five participants are trained as LIS professionals, and the author does not do enough to emphasize that their experiences as library users will likely be affected by their educational and career choices.

The results and conclusion offer credible and concrete suggestions about how library access can be improved for all, and discuss other limitations of the study and suggestions for future research.

-annotation provided by Gretchen Neidhardt, Chicago History Museum

Sarles, Patricia. 2012. "The Library of Congress finally acknowledges donor offspring (But this is only a beginning)." *Donor Offspring: Books for Tweens and Teens* (blog). *Blogger.* June 13, 2012. https://yabooksfordonoroffspring.blogspot.com/2012/06/library-of-congress-finally.html

Sarles makes the case that the Library of Congress should create a "Donor Conceived" subject heading based on the authors extensive list of books that would classify most accurately under this new heading with the understanding that this heading would make it easier for users to find material. Sarles recounts the Library of Congress' initial disagreement then movement toward the creation of the "Children of sperm donors" subject heading. In disagreement with the library of congress, Sarles says that the creation of this subject heading is inadequate and demonstrates that the Library of Congress does not understand assisted reproductive technology, leaving out experiences of those conceived via other means. The author, again, advocates for the use of an all encompassing term like "Donor Conceived", creating a space in the catalog where many titles that are currently misclassified can be more accurately represented.

-annotation provided by Stephanie Porrata, The Ohio State University

Tennis, Joseph T. (2012). The strange case of eugenics: A subjects ontogeny in a long-lived classification scheme and the question of collocative integrity. *JASIST* 63(7), 1350-1359.

Tennis uses the historical changes in the Dewey Decimal Classification of eugenics as a case study to examine the "collocative integrity" of classification systems used over long periods of time. Tennis notes that there is a relative lack of research and discussion on how subjects change after being added to an ontology. Tennis provides a detailed timeline of how the admittedly unusual example of eugenics was initially classed in Dewey under Biology (near Genetics) and was later moved to Social Sciences then Philosophy lessening the collocative integrity of the heading. Tennis uses this to demonstrate how if catalogers use the most recent scheme their collection may become fragmented if there is no reclassification of previous resources. The article recommends that designers be aware that systems they create will change over time, and begin to consider how they can accommodate and track changes. This article may be of interest to those working with historical ontologies, and designing new ontologies.

-annotation provided by Eric Willey, Illinois State University

Multiple Categories or General Discussion

Adler, Melissa and Tennis, Joseph T. "Toward a Taxonomy of Harm in Knowledge Organization Systems," *Knowledge Organization* 40, no. 4 (2013): 266-272.

This is a theoretical review by authors who have written on the topic previously and is intended for any users of knowledge organization systems (KOS), but draws on relatively advanced philosophical sources. Adler and Tennis posit that we are in a transition moment between KOS that do harm (knowingly or unknowingly) and KOS that do minimal harm (or the greatest good). They are not prescribing specific solutions, but instead are trying to raise awareness to advocate for "intentional and ethical knowledge organization practices to achieve a minimal level of harm." The paper leans heavily on philosophical influences from Arendt to Zizek to Buddhism, and approaches the issue from an anti-imperialist perspective. There is a philosophical discussion of the following topics: what (harm) happens when we classify; locating harmful actions in classification and naming; and the Buddhist principles of wholesomeness and intentionality; and implications for participants. The paper closes with two concrete examples of harm done through un-interrogated use of classification and language.

-annotation provided by Gretchen Neidhardt, Chicago History Museum

Adler, Melissa (2016). The Case for Taxonomic Reparations. *Knowledge Organization*, 43(8), 630-640. https://digital.lib.washington.edu/researchworks/handle/1773/37933

In this paper Adler "brings KO (knowledge organization scholars into dialogue with critical race theorists, indigenous studies scholars, and queer theorists around conversations about reparations and reparative reading practices." The author identifies a need for reparative taxonomies as a conscious response to injustice. As examples of this Adler discusses the #BlackLivesMatter hashtag, the Notable Kentucky African Americans Database, classifications and subject headings concerning topics related to indigenous peoples, and the Digital Transgender Archive. Adler rejects the notion of a one-size-fits-all for reparative taxonomies, and instead concludes that the creation of varied reparative taxonomies "and consciously acknowledging them as such can collectively chip away at the dominant structures that order knowledge in ways that do harm."

-annotation provided by Eric Willey, Illinois State University

Bergman, Barbara, Schomberg, Jessica and Dorie Kurtz. "Survey of classification and organization of videorecordings." *Library Resources & Technical Services* 60, issue 3 (2016): 156-167. Accessed November 3, 2020.
http://cornerstone.lib.mnsu.edu/lib_services_fac_pubs/59/

Bergman, Schomberg, and Kurtz identify two main issues in classifying videorecordings: technical difficulties and bias. Many technical problems arise from print resource classification systems being ill-suited to videorecordings. Authorship is fraught with issues, whether assigned to the director or a collective. Streaming video has further complicated things with changed rights, massive influxes of records, and unreliable user-generated metadata. Call numbers facilitate browsing, but the authorship question makes assigning them difficult and can lead to unwieldy Cutters. Call numbers and authorship also play into cataloging biases, such as separate call numbers for films about white men and black men, and cultures that assign collective authorship. Bias proved a difficult issue to discuss through surveys, and the authors suggest qualitative research on the problem going forward. Many of the librarians surveyed use local practices to cope with these problems, and the authors see this trend continuing, concluding that it is impossible to create a universal videorecording classification system.

-annotation provided by Jeremy Berg, University of North Texas

Berman, Sanford (1971). *Prejudices and antipathies: A tract on the LC subject heads concerning people*. Metuchen, N.J: Scarecrow Press. See Knowlton (2005) for a 30 years later reflection.

Sanford (Sandy) Berman's 1971 monograph is a foundational text in the movement to correct bias in Library of Congress Subject Headings (LCSH). In the book Berman lists 225 headings and proposed edits or modifications so that they would more closely match language used by patrons during searches and correct bias. Sanford was working on headings from the seventh edition of the Library of Congress subject headings manual, published in 1966, and because of

this specific examples in the book rarely reflect the terms used in 2020. However, as an example of historical subject headings and reasoning for changing headings (especially in regards to bias) Sanford's book remains relevant and is frequently cited. Those engaged in research in historical bias in subject headings or the reasoning behind changing them will likely find Berman's work relevant, and it is frequently cited. Berman's book retains enough relevance that Steven A. Knowlton authored the article "Three decades since Prejudices and Antipathies: A study of changes in the Library of Congress Subject Headings" in 2005.

-annotation provided by Eric Willey, Illinois State University

Berthoud, Heidy, and Rachel Finn. 2019. "Bringing Social Justice Behind the Scenes: Transforming the Work of Technical Services." *The Serials Librarian* 76 (1-4): 162–69. https://doi.org/10.1080/0361526X.2019.1583526

Berthoud and Finn share insights on incorporating social justice into technical services, utilizing lessons learned from their work on their libraries' Diversity, Inclusion and Social Justice Working Group and their combined experiences with technical services, research librarianship and Zine librarianship with collection development duties. Both authors are explicit in sharing how their experiences and work duties influence their social justice work, making it easier for readers to make similar connections to their own work. The authors offer both theoretical and practical suggestions for consideration by library workers ranging from ethical purchasing of collection material to Finns' "spiral collecting" and "expansive scope collecting" practices. The authors make a strong case for "praxis is theory", emphasizing how moving toward more intentional collection development can inform our approval plans and collection development plans down the line, creating a system for continuous improvement and reflection. This article will be of most interest to library workers with collection development responsibilities or library workers in technical services needing guidance on incorporating social justice work into their day-to-day work. This article can also inspire library workers in other areas to consider how they can incorporate social justice work into their daily duties.

-annotation provided by Stephanie Porrata, The Ohio State University

Billey, Amber "Just Because We Can, Doesn't Mean We Should: An Argument for Simplicity and Data Privacy With Name Authority Work in the Linked Data Environment." *Journal of Library Metadata* 19, no. 1-2 (2019): 1-17. Accessed November 4, 2020, https://www.tandfonline.com/doi/full/10.1080/19386389.2019.1589684

Switching from Cutter's principles of authority work to FRBR/FRAD caused a seismic shift in how catalogers create name authority records. RDA's interpretation of FRAD guidelines changes the purpose of identity work from disambiguation to identification, with 3xx fields requiring us to gather personal information about someone's life. Doing so can violate privacy and endanger people, and library catalogs cannot even use most of that data. Plus, catalogers

always risk bias with what we choose to put into records and including more and more personal information magnifies that risk. Billey argues 1) that we should make linked data do the work instead, using URIs for disambiguation rather than digging into someone's life to create a unique name form, and 2) that we can abide by RDA rules but be neutral by limiting ourselves to a select few fields. Lastly, only use publicly available information; digging is an invasion of privacy.

-annotation provided by Jeremy Berg, University of North Texas

Bowker, G. C. and Star, S. L. (1999). *Sorting things out: Classification and its consequences*. Cambridge, Mass.: MIT Press.

Bowker and Star examine how both formally and informally created categories and standards shape society. The authors focus on the International Classification of Diseases (ICD), the Nursing Intervention Classification (NIC), racial classification in South Africa, and the classification of viruses as their examples. The history of how classification systems are designed is examined by discussing how these systems developed over time. The impact of classification systems on individuals and societies is discussed, including "two cases where the lives of individuals are broken, twisted, and torqued by their encounters with classification systems." (p. 26). Some specific examples are dated (searching Alta Vista and reading Usenet groups, for example) and this text does not specifically address library classification systems such as LCSH or Dewey. However, it does provide a relevant discussion of how people and society interact with and are acted upon by classification systems, and how classification systems are developed over time.

-annotation provided by Eric Willey, Illinois State University

Clarke, Rachel Ivy, and Sayward Schoonmaker. 2019. "Metadata for Diversity." *Journal of Documentation* 76 (1): 173–96. https://doi.org/10.1108/JD-01-2019-0003

The authors argue that metadata can be a systematic way to encourage and make available diverse materials within library collections. To do this, the authors' method included first, examining thirteen contemporary metadata schemas from within and outside libraries in order to determine what metadata elements already exist to represent diverse library reading materials, and performing two schema crosswalks to highlight any missing elements that may increase access points to diverse materials. The authors found that many of the schemas examined already had metadata elements that could potentially be used as access pints to identify diverse materials. With that said, the authors found that specific metadata elements to represent racial, ethnic, national and cultural identity in a meaningful way were not present, and often are resigned to a "basket" element which lacks specificity to be meaningful as access points. This article will be helpful for librarians interested in looking critically at how their metadata systems help or hinder access to diverse materials within their collections.

-annotation provided by Stephanie Porrata, The Ohio State University

Colbert, J.L. (https://orcid.org/0000-0001-5733-5168) "Patron-driven subject access: How librarians can mitigate that 'power to name.'" *In the Library with the Lead Pipe*, November 15, 2017. http://www.inthelibrarywiththeleadpipe.org/2017/patron-driven-subject-access-how-librarians-can-mitigate-that-power-to-name/

Colbert recommends that catalogers use human subject research to determine what language patrons use to search for a topic, includes a discussion of potential strategies for patron-driven subject access (PDSA), and describes his own case study in comparing what terms patrons use in searching for LGBT topics to Library of Congress Subject Headings. PDSA systems evaluated include tagging, culturally-responsive metadata, and human subjects research. Colbert notes that most studies on how patrons retrieve information or interact with subject headings are undertaken by public services or reference services librarians. The semi-structured interview methodology that Colbert used to conduct his own more technical services centered research is described, and Colbert addresses potential problems with the PDSA approach while still advocating for including patrons in creating metadata.

-annotation provided by Eric Willey, Illinois State University

Cridford, Thomas J. "Cataloguing, knowledge and power." *Journal of Radical Librarianship* 5, (2019): 61-83. https://journal.radicallibrarianship.org/index.php/journal/article/view/41

Cataloging philosophy is anchored in the mid-19th Century Enlightenment principle that facts are external and neutral, but actually classification has the same biases as the culture that creates it. Postmodern thought accounts for the fact that knowledge varies and codes need to be flexible, and that relations between things are hugely important. The internet helps by giving us many portals to knowledge, but also treats us as information ourselves, freezing us into just one set of attributes as we are cataloged (as in an NAR) or self-represent (as in an online profile). FRAD has catalogers trying to identify people as a whole, not just disambiguate names, which makes catalogers responsible for part of the freezing. Personalized search results are also double-edged, helping to find what we want but also reinforcing existing prejudices or what people want to push to us. Similarly, search engines like Google index majority viewpoints to appeal to the most powerful demographics in order to sell ads. If we understand cataloging's power, we can channel it for good and against oppression.

-annotation provided by Jeremy Berg, University of North Texas

Cushing, Lincoln. "Cataloging as Radical Practice." *SRRT Newsletter* (*Social Responsibilities Round Table*) 186 (2014): 10. Accessed November 4, 2020. http://www.ala.org/rt/srrt-newsletter-issue-186-march-2014#10

Cushing is a consulting archivist for social justice posters at the Oakland Museum of California, and he collaborates with the community to catalog them. He says that his expert status is down to being old enough to know what events the posters refer to and knowing who to call. He gives three examples to show how thrilled people are to participate and add knowledge. These interactions also humanize the posters and give them depth, which in turn makes them useable again, not just artifacts. Our job as information professionals is to maximize the impact of people's history, and posters are often the only permanent objects from these events. Since making them available to the public is so vital, it is better to have an imperfect record so a piece can be up where people can see it than to let it languish until it is perfect.

-annotation provided by Jeremy Berg, University of North Texas

Deodato, Joseph. "The patron as producer: Libraries, web 2.0 and participatory culture." *Journal of Documentation* 70, no.5 (2014): 734-758. Accessed November 4, 2020. https://www.emerald.com/insight/content/doi/10.1108/JD-10-2012-0127/full/html

Deodato says that while libraries view themselves as neutral providers of knowledge, they actually construct it and are, like all knowledge constructors, inherently biased. Libraries' selection, classification, and presentation of knowledge reinforces the information hegemony and dominant biases of the culture that created them, but they can use web 2.0's principles to be more inclusive via user participation. Deodato considers several philosophical arguments about the construction and consumption of culture, and concludes that replacing the dominant culture's system with a different one would just establish different biases and limits. What is needed is a movement from one way communication to a dialogue with true user participation in classification, remixing, and resource selection. Also, since systems never meet 100% of their users' needs, they must be set up for modification whenever service gaps are found.

-annotation provided by Jeremy Berg, University of North Texas

Drabinski, Emily. "Teaching the Radical Catalog," in *Radical Cataloging: Essays at the Front*, ed. K.R. Roberto (Jefferson, NC: McFarland & Company, 2008), 198-205.

In this chapter, Drabinski gives an overview of the intersection between critical classification theory and critical pedagogy. Drabinski provides a brief overview of classification theory, emphasizing the ways in which classification schemes are problematic in their use of language and how they are structured and discusses how these characteristics conflict with the service classifications provide (making materials accessible). After providing examples of how these problems might be addressed (challenging and changing thesauri, developing local solutions,

utilizing relevance algorithms), Drabinski proposes a fourth strategy rooted in critical pedagogy. When Librarians and Library workers address the problems of classification in their teaching, they are empowering students to think and use these systems critically. The references Drabinski makes to set up both classification theory and critical pedagogy are fundamental, and act as a good entry point into learning more about each topic. This chapter supports how library workers in cataloging and metadata might think to reach out to their colleagues in more public facing roles, an opportunity to not only learn from each other, but also from students . This chapter may be of interest to library students and library workers who are interested in critical pedagogy or critical classification theory, and those who are currently doing any sort of cataloging, metadata or instruction duties.

-annotation provided by Stephanie Porrata, The Ohio State University

Feinberg, Melanie (2007). "Hidden bias to responsible bias: an approach to information systems based on Haraway's situated knowledges" *Information Research*, 12 (4) paper colis07.
http://InformationR.net/ir/12-4/colis/colis07.html

Feinberg argues that bias in information systems cannot be entirely eliminated, but a more inclusive information system can be created by explicitly stating and documenting the perspectives used in creating an information system. Unacknowledged bias makes the creation of an objective information system impossible, therefore our subjective systems should acknowledge our biases and document them for users. Feinberg further argues that this approach should be combined with multiple domains, as a single domain approach is inherently incomplete. By providing rationales for use and employing multiple-domains, an information system accommodates a multi-disciplinary approach and documents the biases in selection of criteria. Feinberg's research would likely be of interest to those designing information systems, or discussing bias in existing information systems.

-annotation provided by Eric Willey, Illinois State University

Ferris, Anna M. (2008). The ethics and integrity of cataloging. *Journal of Library Administration* 47(3-4), 173-190.
http://www.tandfonline.com/doi/abs/10.1080/01930820802186514#.UvFGvfldWSo

Ferris starts with broad strokes, beginning with a generic definition of ethics, then moving to librarians and ethics-- noting that Florence Mason's definition of ethics could simply be applied to delineate the roles of librarians-- followed by a section on Codes of ethics for information professionals-- including librarians, and then on to catalogers specifically.

Ferris introduces potential ethical issues for catalogers with a fabricated incident from Fay Zipkowitz in which a librarian is required to catalog objectionable materials-- a book denying the Holocaust actually occurred. Ferris then looks to library literature related to values, and notes

that while librarians may criticize ALA's Code of Ethics for being too general, "most nevertheless recognize a set of core professional values" (p. 176), listing the 11 values identified by Wallace C. Koehler following a survey. Michael Gorman's definition of librarianship includes several factors related to cataloging-- and acquisitions. Ferris proposes an additional, primary core value for catalogers-- "the promotion and preservation of the integrity of the catalog." (p. 178).

Gorman's "five fundamental responsibilities of librarianship" (p. 178) include one role specific to catalogers-- organizing materials to provide discoverability and access to needed information. This is primarily achieved through bibliographic control-- while implementing catalogers' judgement. The "integrity" of the library catalog is key and should ideally be consistent, dependable, reliable and unbiased. However, critics such as Sanford Berman charge that some Library of Congress Subject Headings, as well as some cataloging policies and practices hinder access and create bias. Ferris goes on to describe such issues, including the acceptance of Library of Congress (LC) "as the de facto standard for bibliographic control" (p. 182), incorporating specific illustrative examples, along with possible resolutions to the problems.

Related to potential issues of relying on the Library of Congress, Ferris includes the 2006 decision by LC to cease tracing series in bibliographic records-- and the impact on libraries-- and the ethical dilemma forced upon catalogers as whether to take on this potentially time- and labor-intensive task themselves, in addition to already existing workloads.

Steps are being taken to resolve ethical dilemmas in catalogs-- Library of Congress Subject Headings have been added and modified to reduce biases, and the Library of Congress "continues to be amenable to revising the LCSH," (p. 184). Program for Cooperative Cataloging (PCC) members have agreed to take on and maintain series authority control. And at the time this article was written AACR2 was in the process of being replaced with a new descriptive cataloging code, under development-- Resource Description and Access (RDA).

Ferris concludes reiterating the critical role of catalogers. "The ethics of cataloging comes down to one thing-- the cataloger's personal obligation to bring order to information and to make it accessible to the persons seeking that information." (p. 185). Includes bibliographic notes (p. 187-190).

-annotation provided by Cathy Chapman, Saint Martin's University

Harihareswara, Sumana. 2015. "User Experience Is a Social Justice Issue." *Code4lib Journal* 28(1). http://journal.code4lib.org/articles/10482

In this print adaptation of a keynote given at the Code4Lib 2014 conference, the Harihareswara uses examples from banking, lending, Wikipedia, healthcare, and encryption to demonstrate how bad usability can alter the choices that people make, leading to less than ideal or even potentially harmful outcomes. This article does not explicitly cover metadata and cataloging practices, but it does emphasize the need for thinking about usability and user experience inside and outside of libraries. This keynote supports using disciplined empathy to address poor

usability which creates library spaces and services that can support library workers in accomplishing their social justice goals. This keynote will be of most relevance to library developers and library technologists, but the implications of usability and user-centered design is relevant to any area of the library. See Hoffman (2009) for a practical approach to a user-centered approach in cataloging and metadata practices.

-annotation provided by Stephanie Porrata, The Ohio State University

Hoffman, Gretchen L. 2009. "Meeting Users' Needs in Cataloging: What Is the Right Thing to Do?" *Cataloging & Classification Quarterly* 47 (7): 631–41. https://doi.org/10.1080/01639370903111999

This article asks catalogers to think critically about how to center the user's experience. The author demonstrates how cataloging research, cataloging practice, and cataloging standards are not very user-centered, despite claims that they are. After highlighting the shortcomings of cataloging research, practice, and standards, readers are given suggestions that will move the field toward a more ethical cataloging practice. The first suggestion is a call to incorporate users' needs into cataloging standards and research, giving catalogers the tools and guidance to meet users' needs in practice. The second suggestion is to take a socio-cognitive approach to users, focusing on domains of users, rather than individual users. This suggestion would have an impact on controlled vocabularies, indexing, classification, and standards for descriptive cataloging. This article will be of interest to library workers and library and information science students interested in ethical approaches to cataloging and metadata.

-annotation provided by Stephanie Porrata, The Ohio State University

Howard, Sara A. & Knowlton, Steven A. (2018). Browsing through bias: The Library of Congress Classification and Subject Headings for African American Studies and LGBTQIA studies. *Library Trends* 67(1), 74-88. https://muse.jhu.edu/article/706989

The most commonly used Knowledge Organization System (KOS) in academic libraries is Library of Congress Classification (LCC), developed between 1899 and 1903. LCC divides "human knowledge" into twenty classes, which tend to replicate the academic departments and disciplines of the time-- philosophy, history, medicine, agriculture, etc. As a result, materials for interdisciplinary fields such as African American and LGBTQIA studies tend to be spread throughout the library, making browsing shelves for similar, relevant materials much more difficult. This can be problematic as studies have shown that library users still heavily rely on browsing to identify books of interest. Also, there is persistent patriarchal, eurocentric bias in both the classification and in the subject headings, which "others" historically marginalized people. The difficulty of browsing for interdisciplinary materials-- as well as inherent systemic bias and sometimes derogatory classification or subject headings-- can lead to user frustration and can even cause some patrons to stop using the library and its resources altogether.

Such difficulties "provides both difficulties and hurdles for librarians." (p. 76). When librarians familiarize themselves with the classification schemes, subject headings and keywords used in interdisciplinary areas and used by their library, they can better facilitate locating materials for their patrons, as well as teach researchers how to navigate their institution's Knowledge Organization System-- and help identify pertinent classification areas their patrons may not have considered-- and help them think critically about OPAC search results.

This article includes "tools to help researchers have a holistic view of applicable titles across library shelves…" (p. 74)-- specifically four online tables which can be accessed through the provided link in the appendix. These comprehensive tables [148 pages total] are composed of "what we believe is a complete list" (p. 80, 81) of Library of Congress Classification Numbers for African American and LGBTQIA studies. The tables can be helpful to librarians and researchers in familiarizing themselves with the many, many places that such materials are located, and can also be helpful in collection analysis and collection development.

-annotation provided by Cathy Chapman, Saint Martin's University

Kandiuk, Mary, ed. *Archives and Special Collections as Sites of Contestation*. Sacramento, CA: Library Juice Press, 2020.

While this book discusses wide-ranging aspects of archives and special collections, four chapters in particular focus on cataloging issues. "Censorship or Stewardship? Strategies for Managing Biased Publications and Indigenous Traditional Knowledge in Special Collections Libraries" by Lara K. Aase discusses classification as a lens to access, and discusses solutions implemented at the Delaney Southwest Research Library in the Center of Southwest Studies at Fort Lewis College in Durango, Colorado.

"Ethical Cataloging and Racism in Special Collections" by Elizabeth Hobart discusses Hobart's own experiences cataloging items containing racism, and includes historical framing, three specific examples (including decisions and effects), and advice for those cataloging similar materials.

"Contesting Colonial Library Practices of Accessibility and Representation" by Margarita Vargas-Betancourt, Jessica L. English, Melissa Jerome, and Anbelibel Soto discuss University of Florida's Latin American and Caribbean Collection consortial relationship with the Digital Library of the Caribbean, including analyzing equitable metadata implementation, particularly bilingual access points.

Lastly, "The Importance of Collecting, Accessing, and Contextualizing Japanese-American Historical Materials: A California State University Collaborative" by Gregory L. Williams and Maureen Burns is a wide-ranging chapter discussing several aspects of Japanese-American historical materials, but it does spend a significant amount of time discussing cataloging, metadata and vocabulary/terminology.

Keilty, Patrick (2009). Tabulating Queer: Space, Perversion, and Belonging. *Knowledge Organization* 36(4): 240-248.

Ph.D. candidate Patrick Keilty gives a historical overview of classification and the knowledge organization [KO] structure of queer studies. Classification essentially attempts to group things in relation to where they "belong." However, there is a "paradoxical relationship [with queer being] both resistant to and reliant on categories, classification, and knowledge structures." This is further complicated as the term 'queer' "is an ever-shifting category." [p. 240].

Keilty begins the discussion of queer KO systems writing about the classification system-- and lasting effects of the work of-- 19th century Karl Heinrich Ulrichs, who created a taxonomy of sexual categories, basing his terminology on Plato's *Symposium*-- coining such terms as "Uranodionings" (bisexuals) and "Uranodioningins" (female bisexuals). Keilty also notes that Ulrich's attempts to classify sexual types was an effort to decriminalize homosexuality in Germany.

Keilty points out that "like Ulrich's unwieldy tabulation of sexual categories, today's popular abbreviation 'LGBT' is ever-expanding and cumbersome," reiterating the paradox that "queer's non-normativity relies on norms as a precondition, and is therefore defined in relation to its opposite." [p. 242].

Gender classification-- and the emphasis on heteronormativity-- has both positive and negative aspects. It can be used coercively-- consider the requirement to select gender to get a drivers' license, apply for jobs, etc. On the other hand, there can be rewards, such as special funds designated for interest groups and minorities.

The article is more theoretical and written for an academic audience.

Knowlton, Steven A. (2005). Three decades since Prejudices and Antipathies: A study of changes in the Library of Congress Subject Headings. *Cataloging & Classification Quarterly* 40(2), 123-145. http://www.sanfordberman.org/biblinks/knowlton.pdf

Knowlton's 2005 study found that 80 items, or about 36% of Sanford Berman's suggestions from *Prejudices and Antipathies* remain unaddressed. The majority of the unaddressed subject headings pertain to Christianity as well as United States history. However, a random sampling of the headings in the survey indicate even further changes have occurred in the time since the publication of this article. For instance, the subject heading "Idiocy" was changed to Berman's suggestion of "Mental retardation" in 1993, with a further change to "Intellectual disability" in

2005. While the study shows progress in addressing bias in LCSH, there are still areas needing attention.

-annotation provided by Jennifer Young, Northwestern University

Loberfeld, A. & Rinck, E. M. "Structural (in)visibility: Possible effects of constructing a controlled vocabulary in a niche domain," 26th ASIS SIG/CR Classification Research Workshop (2015). http://dx.doi.org/10.7152/acro.v26i1.14978

The authors discuss the challenge of creating a controlled vocabulary, specifically a thesaurus, for a field is an "emerging, non-structured domain," and perhaps most importantly that does not have standardized language (biohacking).

Before the authors create a controlled vocabulary, they acknowledge that controlled vocabularies are biased tools, and therefore they have ethical concerns about implications of vocabulary creation. The authors discuss the benefits versus costs of increased discoverability and retrieval with the bias and work involved in maintaining a frequently-shifting set of terminology, and the importance of involving the community in a vocabulary's creation.

The authors conclude the paper with a discussion of the positive and negative aspects of creating a controlled vocabulary for an emerging field, and end with a call for further research.

-annotation provided by Gretchen Neidhardt, Chicago History Museum

Long, Kara, Thompson, Santi, Potvin, Sarah & Monica Rivero. "The "wicked problem" of neutral description: Toward a documentation approach to metadata standards," *Cataloging & Classification Quarterly* 55, no. 3 (2017): 107-128. http://dx.doi.org/10.1080/01639374.2016.1278419

Long et al acknowledge that metadata is not neutral, therefore metadata design needs to be clearly created with a "documentation approach." In an effort to be transparent, one needs to be explicit about metadata design, including design of systems that disseminate and refine metadata and metadata standards. The authors use an electronic theses and defense (ETD) database in the Texas Digital Library as a case study.

This paper stems from a working group tasked with revising the ingestion system for ETDs. The group took a "wicked problems" approach, which posits that there are no neat or tidy solutions to a problem. This resulted in a "clumsy solutions" answer, which does not address every aspect of the problem immediately, but instead is an iterative and sustainable approach to addressing issues as they come up. For now, the "clumsy solution" is documenting the metadata process and advocating for more archival cataloging and provenance context within the informational record itself.

Ockerbloom, John Mark. "Categorizing people without marginalizing them," *Everybody's Libraries* (blog), 2013, http://everybodyslibraries.com/2013/04/29/categorizing-people-without-marginalizing-them/

The author of this blog post lists some issues inherent in both physical and virtual categorization, but the thrust of the post is to advocate for automatically placing people in broader categories if they are in a narrower category. For example Catherine of Siena is filed under "Christian woman saints", and therefore she should automatically also be filed under "Christian saints", "saints" and other broader categories.

This approach depends on hierarchical categories, however, and does not necessarily help map people to various non-hierarchical categories that they may also belong to. I would like to see this addressed in this type of proposal. That said, the author does a good job of addressing other potential criticisms of this approach.

One other issue I would also have liked to see the author address more thoroughly is the harm that categorizing can do, particularly when the person in question has not self-identified as the categories chosen for them by catalogers. He mentions this briefly in the beginning in regards to physical book organization, but does not address the ethics of it in electronic/virtual organization.

Olson, Hope A. (1998). Mapping beyond Deweys boundaries: Constructing classification space for marginalized knowledge domains. *Library Trends* (47)2, 233-254. https://www.ideals.illinois.edu/bitstream/handle/2142/8213/librarytrendsv47i2_opt.pdf?sequence=3#page=56

Classification systems are painted as neutral maps of existing hierarchies, but classification and hierarchy are both social constructs biased by their environment, so they exclude marginalized groups. Those groups' concepts need to be given "rhetorical space" via the concept of paradoxical space, in which things exist both inside and outside of boundaries. Olson decided to fit items from A Women's Thesaurus into the Dewey Decimal Classification system for her proof of concept, as the DDC is the world's most widely used classification system but has many biases. She succeeds, but mapping in a marginalized topic does not fix the problem on its own. It is nonetheless an important step forward since no classification system will ever be all inclusive; different systems just mean different limits with a different groups' concerns centered. What is necessary is to change the theoretical framework so that classification systems are porous and allow for marginalized knowledge to dialogue with them.

Olson, Hope A. (2000). Difference, culture and change: The untapped potential of LCSH. *Cataloging & Classification Quarterly* 29(1-2), 53-71. http://www.tandfonline.com/doi/abs/10.1300/J104v29n01_04#.Uu_k4vldWSo

The author explores the potential of Library of Congress Subject Headings (LCSH) as an agent of cultural change using the Third Space framework developed by Homi Bhabha. The author theorizes that in the catalog LCSH occupies a space between documents and users seeking them. In this third space LCSH interprets the meanings of those documents for users through patriarchal Western culture rather than being a neutral representation of reality. In order to address this, the author concludes that LCSH should represent cultural differences in headings and update the headings as culture changes. Specifically, it is recommended that LCSH actively create headings describing marginalized groups. By providing scope notes in LCSH describing concepts unfamiliar to the public the Library of Congress can make the public more familiar with those concepts. LCSH can also more aggressively update and change headings to create a more progressive catalog. Finally, the author urges that catalogers work to become more comfortable with ambiguity or hybridity and resist the urge to assign subject headings based on mutually exclusive categories. While some specific portions might be rather dated at this point, this article will likely be of interest to researchers looking into the theoretical underpinnings of addressing bias in cataloging.

Olson, Hope A. (2001). Standardization, objectivity, and user focus: A meta-analysis of subject analysis critiques. *Cataloging & Classification Quarterly* 32(2), 61-80. http://www.tandfonline.com/doi/abs/10.1300/J104v32n02_06#.Uu_jtvldWSo

The author provides a meta-analysis of the existing literature critiquing subject and classification bias. Olson examines 93 articles and books (all that could be located) to determine which standards are examined, which categories of problems are identified, which groups or topics are examined, the date the research was conducted (or publication date if not known), and whether the author used research (an identifiable methodology) or relied on professional experience in their methodology.

The paper finds that the most criticized standards are the ones used most frequently in North America; however, Olson's findings show that subject headings are more frequently studied than classification. Analysis of data also shows that biased or negative terminology is the most frequently discussed category of problems. The paper also shows that most of the data was gathered in the 1980s, then the 1990s, and then the 1970s. Finally, data shows that most works relied on experience rather than research with a documented methodology, although some works utilized both.

The author notes that indexing problems may have lead to them missing relevant works, but still concludes that librarians are invested in critical self-reflection regarding their metadata, subject access standards have not eliminated negative bias, that the literature has defined the problems in subject access, and that there are some common problems which indicates a need for research on systemic issues. Overall, this article may be of interest to researchers considering methodologies for their own meta-analysis, or insights into the field's earlier development. Unfortunately, the website providing a list of citations for the 93 works used in this analysis is no longer available and does not appear in the Wayback Machine.

-annotation provided by Eric Willey, Illinois State University

Olson, Hope A. "Sameness and difference: A cultural foundation of classification," *Library Resources & Technical Services* 45, no. 3 (2001): 115-122.
http://polaris.gseis.ucla.edu/gleazer/462_readings/olson_2001.pdf

This article highlights how the sameness/difference distinction in Western culture also showcases our biases. Olson's two main issues are: 1-what we define as the same is culturally grounded and 2-classification as we practice it creates a hierarchy of sameness. Olson offers four partial solutions, along with a call for more from readers. Her solutions include 1-local control and specificity; 2-utilizing different notational options; 3-incorporating other standards; and 4-varying citation order (shifting which sameness gets priority). Olson does note that none of these solutions are universal, and in fact, we likely cannot have universal solutions in a postmodern society. Instead, responsibility lies with all of us to make decolonized solutions for our own audiences and institutions.

-annotation provided by Gretchen Neidhardt, Chicago History Museum

Olson, Hope A. (2002). *The power to name: Locating the limits of subject representation in libraries*. Dordrecht, The Netherlands: Kluwer Academic Publishers.

Olson undertakes a detailed examination of the founding principles of library classification as written by Melvil Dewey and Charles Cutter. Olson particularly focuses on the universality and control they advocated for to create consistency in call number classification (chapters 1-3) and subject heading assignment (chapter 4). It is Olson's thesis that "subject access to information outside of our traditional cultural mainstream and for groups marginalized in our society is disproportionately affected by the fundamental presumptions on which our practice of subject representation exists" (page 15). The text then examines how existing classification schemes fail to accurately describe twelve common works dealing with race, gender, sexuality, class, and other topics. Olson concludes by advocating for libraries to adopt classification schemes which allow for more "local, partial, and dynamic change" (page 235).

Rafferty, Pauline, and Rob Hidderley. 2007. "Flickr and Democratic Indexing: Dialogic Approaches to Indexing." *Aslib Proceedings* 59 (4-5): 397–410. https://doi.org/10.1108/00012530710817591

Rafferty and Hidderley examine three models of subject indexing (expert-led indexing, author-generated indexing, user-oriented indexing), focusing on the pros and cons of each, and connecting them to Bakhtin's dialogic and/or monologic aspects of utterance. Following this discussion is an overview of Flickr as an author-based indexing system and its knowledge organization. The authors lay out issues with unmediated tag creation noting problems with vocabulary that is too narrow or too broad, issues with the "false use" of tags on Flickr which may lead to entropy and chaos from an indexing perspective, and explore how codes, multiple words, ambiguity and synonyms can all cause problems for useful retrieval of images on Flickr. To address many of the issues mentioned, Rafferty and Hidderley offer findings from their Democratic Indexing Project that offer some suggestions on how to make a system like Flickr's work, but they note that social tagging and self-organizing systems are not effective on their own. This article is grounded in theory on semantics, semiotics and ontology, but provides a clear understanding of practical consequences to user retrieval of images. This article will be of interest to library and museum workers looking for guidance on indexing images and for library workers who are interested in learning more about social tagging and user-driven tagging systems.

-annotation provided by Stephanie Porrata, The Ohio State University

Sandberg, Jane, ed. *Ethical Questions in Name Authority Control.* Sacramento, CA: Library Juice Press, 2019.

This book covers several important areas relevant to social justice in authority cataloging through the lens of ethics. It is divided into five parts: self-determination and privacy; impacts of colonialism; gender variance and transgender identities; challenges to the digital scholarly record; and emancipatory collaborations. Chapters largely discuss real examples with practical solutions, and this will be an invaluable source to anyone working with authority metadata in cataloging.

-annotation provided by Gretchen Neidhardt, Chicago History Museum

Szostak, Rick. "Classifying for Social Diversity," *Knowledge Organization* 41, no. 2 (2014): 160-170. http://search.ebscohost.com/login.aspx?direct=true&db=lxh&AN=95782277&site=ehost-live

The author proposes a truly universal system of classification that reflects and supports social diversity, which I am skeptical can be done. He advocates using a interdisciplinary, feminist web-of-relations approach, which I can certainly see being less biased than current systems, but

I am not sure any system could ever be completely universal or unbiased. Szostak posits that classification needs to encompass both relationships between as well as qualities of things, and that for now, hierarchical relationships in classification are inevitable. The paper goes through the purpose, structure, and process details of how this would work, and while heavy on philosophy and theory, does offer more tangible ways forward than many similar papers.

-annotation provided by Gretchen Neidhardt, Chicago History Museum

Tennis, Joseph T. (2012). A convenient verisimilitude or oppressive internalization? : Characterizing the ethical augments surrounding hierarchical structures in knowledge organization systems. *Knowledge Organization* 39(5), 394-397. https://digital.lib.washington.edu/researchworks/bitstream/handle/1773/37963/Tennis2012KnowledgeOrganization.pdf?sequence=1&isAllowed=y

Tennis argues for a separation of semantics and structure in order to address ethical issues in knowledge organization systems (KOS's). Tennis argues that by considering semantics and structure separately, designers of KOS's can more deeply consider their intentions and agency in designing a KOS. By working outside a hierarchy they can also examine their own assumed definitions more closely, and make them more explicit for users. This article may be of interest to those working with our considering hierarchical versus flat ontologies.

-annotation provided by Eric Willey, Illinois State University

Author Information

Jeremy Berg is the Cataloging Librarian at the University of North Texas.

Cathy Chapman, Resource Management Librarian, is the sole cataloger [and acquisitions librarian] at Saint Martin's University, O'Grady Library. https://orcid.org/0000-0002-3199-4955

Gretchen Neidhardt is the Cataloging and Metadata Librarian at the Chicago History Museum.

Stephanie Porrata is a Mary P. Key Diversity Resident Librarian for Area Studies at the Ohio State University.

Eric Willey is the Special and Collections and Formats Cataloger at Illinois State University, Milner Library. https://orcid.org/0000-0002-7514-0011

Jennifer Young is the Metadata Coordinator at Northwestern University Libraries.