All-Inclusive Metadata Policy

Date Approved: Approved by Diversity Committee on 10/09/2024; Approved by CSSC 10/31/2024; Approved by Senior Leadership on 11/04/2024
Effective Date: 11/04/2024
Responsible Position: Metadata Librarians, Archivists, Library Assistants working with cataloging/metadata
Responsible Office/Department/Team: Technical Services and University Archives & Special Collections
Revision History: Version 1.0
Related Legislation and University Policies:
  ● [CWRU Libraries' Collection Diversity Framework](#)
  ● [CWRU Libraries Diversity Action Plan](#)
  ● [CWRU Diversity Statement](#)
Review Period: 5 years
Date of Last Review: November 4, 2024
Relates to: Case Western Reserve University faculty, staff, & students

I. Policy Statement

The Kelvin Smith Library will create and curate metadata that is inclusive of people of all racial, ethnic, cultural, socioeconomic, national, and international backgrounds, religion, age, sexual orientation, gender identity/expression, political affiliation, and disability (please refer to [Appendix 1 of the Diversity Action Plan](#)). Through both newly created and reparative description work, we strive to provide a library catalog that demonstrates our commitment to promote a culture of human dignity, free of prejudice and discrimination.

II. Purpose of this Policy

This policy will define all-inclusive metadata as it pertains to the workflows of Kelvin Smith Library cataloging/metadata staff, outline the scope, authority, and maintenance of all-inclusive metadata, and provide resources for best practices related to this policy.

The purpose of this policy is to recognize the significant role that cataloging and resource description play, not only in access and discovery of resources, but also in fostering an environment of inclusivity, openness, belonging and well-being for our library community. A growing breadth of literature has revealed that the terminology prescribed by popular controlled vocabularies (such as the Library of Congress Subject Headings) and resource description methods historically used by libraries have inadvertently led to further marginalization of communities. To address this, we will perform ongoing reparative catalog projects and put forth a good faith effort to use terminology that

creates a library and research environment that is welcoming and supportive of all community members.

III.   Definitions

All-inclusive - Creating an environment and practices that comprehensively captures and embraces the diverse needs, backgrounds, and perspectives of all individuals.

Cataloging - The process of creating and maintaining records of the library's resources. This may include the detailed description and classification of each resource in order to facilitate identification, retrieval, and use by library patrons. Cataloging is a critical function in libraries as it ensures that users can easily find and access the resources they need.

Controlled vocabulary - A standardized vocabulary used to describe and organize library resources in a way that creates controlled access points in the library catalog, allowing resources to be found in a systematic manner. Examples of widely used controlled vocabularies include the Library of Congress Subject Headings (LCSH), Medical Subject Headings (MeSH), and Art & Architecture Thesaurus (AAT). Controlled vocabularies are crucial for maintaining consistency in cataloging and enabling effective searching. However, some controlled vocabularies have been criticized for using outdated or biased terminology, leading to efforts to revise and create more inclusive alternatives.

Copy-cataloging - The process of finding a pre-existing bibliographic record for a newly acquired resource and ingesting it into the local library catalog. Copy-catalog records are retrieved from OCLC Connexion and/or OCLC WorldShare, and may be edited by the librarian or technician in order to meet local practices.

Harmful language statement - A disclaimer used to acknowledge the presence of offensive, outdated, or harmful language, images, or ideas in library materials or collections. This statement serves to inform users that the materials reflect the historical context in which they were created and may contain content that is discriminatory, prejudiced, or otherwise harmful by today's standards. The purpose of the statement is to provide context and to recognize the impact that such language or imagery can have on individuals and communities. Please refer to [CWRU Libraries statement on potentially harmful content](#).

Metadata - Data that provides information about an item, object, or collection, enabling users to find and utilize information resources. Metadata can include various types of information, such as the title, author, date, publication information, size, format, summary, subject headings, and more. Metadata provides a structural backbone for all library catalog records, finding aids, and digital repositories.

Reparative description - The process of revising and updating metadata and descriptive content in catalog records, finding aids, and digital repositories in order to correct biases, inaccuracies, and potentially harmful/outdated language in historical collections. It is used to address the effects of systemic inequalities and to provide more accurate, inclusive, and respectful descriptions of materials, particularly those representing marginalized communities.

IV. The Policy

IV.1 All-inclusive Metadata Guidelines

The Kelvin Smith Library staff involved with cataloging and metadata work will be proactive in creating all-inclusive metadata in accordance with established best practices. While there may not always be a "one size fits all" solution to metadata inclusivity, the cataloging/metadata staff will make a good faith effort to be consciously considerate of DEI issues as they relate to the metadata in the records that are created and curated at the Kelvin Smith Library.

IV.2 Scope

- All-inclusive metadata practices should be utilized for all original cataloging work performed by KSL staff, whether for physical or digital resources.
- Whenever possible, all-inclusive metadata practices should be implemented in correction and augmentation of copy cataloged records. However, due to the nature of bulk ingesting of vendor-supplied catalog records, it may not be possible for KSL staff to identify and edit vendor metadata.

IV.3 Documentation

- A best practices guide containing nationally recognized tips and policies related to metadata inclusivity will be provided to the Technical Services team and the University Archives & Special Collections team.
- The best practices guide will be updated periodically by the Metadata Librarian to reflect any new or emerging practices in the field of cataloging/metadata librarianship.

IV.4 Metadata Decision

- The authority to create and curate inclusive metadata will include the collective decision of the appropriate librarian, the Technical Services team, and the University Archives & Special Collections team.
- Suggestions, discrepancies or disputes over preferred metadata terms are welcomed by all CWRU faculty, staff, and students, however, it is up to the cataloging/metadata staff member to decide if it is feasible to change the terminology (potentially fragmenting a previously controlled access point).

IV.5 Metadata Maintenance

- KSL cataloging/metadata staff will search for anti-inclusive terminology in the library catalog and perform reparative metadata work each year during the Summer semester.
- During the daily ingest of non-bulk catalog records (i.e. when locating individual records in OCLC for copy-cataloging), reparative work will be performed to remove any outdated/offensive terminology used in the catalog record before it is ingested into the KSL catalog.

IV.6 Materials and collections

Our collections include millions of images, documents, and artifacts from diverse cultures spanning centuries. Some of the language, visuals, and ideas in these materials may now be considered outdated, offensive, or harmful. The Kelvin Smith Library provides access to these unaltered original documents as they reflect historical perspectives that are important for researchers. While KSL cannot alter the language or imagery that is used on or within a library resource, cataloging/metadata staff may apply a statement on potentially harmful content that advises the user of potentially outdated and offensive content within the resource.

V. Other Resources

- [The DEI Metadata Handbook: A Guide to Diverse, Equitable, and Inclusive Description](#)
- [Inclusive Cataloging: Histories, Context, and Reparative Approaches](#)
- [Program for Cooperative Cataloging: Guiding Principles for Diversity, Equity, and Inclusion for Metadata Creation](#)
- [University of Minnesota Libraries: Reparative Description in Archives and Special Collections](#)
- [Archives for Black Lives in Philadelphia: Anti-Racist Description Resources](#)