Towards More Equitable, Diverse, and Inclusive Representation in Metadata and Digitization: A Case Study

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To link to this article: https://doi.org/10.1080/0361526X.2022.2040241
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Presenters

ABSTRACT
In July 2020, The University of Texas at Arlington (UTA) Libraries began work towards building a more equitable, diverse, and inclusive organization. One of the ways in which the organization set out to achieve this goal is through the digitization of materials by and about underrepresented and diverse peoples as well as the accurate representation of these individuals and groups in our metadata. This paper describes how the UTA Libraries’ Committee for Metadata and Digitization approached this charge through the creation of three subgroups. There is discussion of the committee’s goals and processes, an evaluation of progress toward meeting objectives, plans for sustaining this work, and a list of proposed strategies for other institutions interested in implementing similar efforts.

Following the emergence of the Black Lives Matter movement and the publicized instances of police brutality against People of Color, the University of Texas at Arlington’s (UTA) interim President, Telk Lim, released multiple statements and a call to action regarding engagement with the principles of diversity, equity, and inclusion in the UTA community.1 This served as a catalyst for expanding initiatives to increase equity, diversity, and inclusion on campus. UTA Libraries Dean Rebecca Bichel also released statements and prompted the administration to create a plan of action for the UTA Libraries. Bichel stated that, “systemic racism is not unique to libraries or archives, but as members and leaders in an academic community, we need to act – to work immediately and consistently to build a better, more diverse, equitable, and inclusive organization, campus, and nation.”2 The proposed plan breaks down action items regarding the UTA community, UTA library staff, and work that is needed to collectively improve libraries and archives. This plan led to the creation of committees tasked with various aspects of improving equity, diversity, and inclusion (EDI) in the 2020 Fall semester.3 Three of these committees were reorganized into one and renamed the Committee for Metadata and Digitization. This newly combined body was tasked with the following:

1. Initiate a project to create expanded access points to materials in UTA Libraries Special Collections related to the history of African Americans in Texas and the United States through metadata, indexing, and user guides.
2. Revise metadata practices to enhance access to scholarship by Black authors in UTA Libraries’ licensed, open, and owned content.
3. Revise metadata practices to enhance access to scholarship inclusive of diverse experiences and voices in UTA Libraries’ licensed, open, and owned content.

KEYWORDS
Diversity; equity; inclusion; digitization; metadata; reparative revisions

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In order to work towards these goals, the committee addressed actionable items relating to metadata, digitization, and user guides. The committee assigned members to smaller working groups, referred to as “subgroups,” which each addressed individual goals that contributed to the collective work of the committee. Committee members met to plan six-month and twelve-month goals and delineate paths towards achieving these outcomes. This paper will reflect what goals were set, our progress in these objectives, and our plans moving forward.

Objectives and goals

The Committee for Metadata and Digitization has a three-pronged approach to the implementation of EDI policies: prioritize digitization of materials that are representative of underrepresented and minoritized groups; review and revise metadata within our collections; and create recommendations for increased representation in LibGuides and finding aids. By identifying the need for greater and more accurate representation of diverse groups, we seek to enhance the access and discoverability of these resources in our library catalog and digital collections.

Digitization

Among UTA Libraries’ strategic goals is the promotion of “services and resources that increase academic and professional success.” One method of increasing access to resources is through the digitization of materials from the UTA Libraries’ Special Collections. In order to support that strategic goal within the EDI work being done, the digitization subgroup was charged to identify and prioritize the digitization of materials that highlight diverse subjects and experiences, including materials relating to minoritized racial, ethnic, religious, sexual, and gender groups, as well as those with disabilities. To fulfill the objectives for this subgroup, new digitization projects have been created to highlight materials that include the voices and experiences of Black, Indigenous, and People of Color (BIPOC) communities.

The first goal of this subgroup was to identify materials within our collections that have not yet been digitized that further our EDI objectives. These are primarily limited to materials within processed or unprocessed collections with a detailed inventory list. The process of identifying materials is in consultation with our department heads, who have institutional knowledge and deeper understanding of our collections. We also sought to identify gaps in our collection that we could fill through the acquisition of new materials. This process involved researching people, places, and events that are within our collecting scope and that align with EDI initiatives. We then identified the historic value of these materials and communicated the gaps in our collections to archivists who can initiate potential outreach efforts for collection development.

For future work within this subgroup, we aim to create a digitization model for selected materials, outline the digitization project workflow, evaluate storage needs and protocols, and review and revise metadata standards. We will also continue to expand upon a priority list of materials, which includes books, maps, ephemera, broadsides, archival materials, and other items from our collections. We are also working to create a list of localized name authorities of terms, people, and organizations that will control how we enter metadata for subject headings and name authorities.

Metadata

The metadata subgroup focused on improving metadata throughout our digital collections and library catalog. Our goals for this subgroup included: identifying problematic terminology with our digital collections and library catalog, flagging collections that may need closer review, creating standards and best practices for metadata creation by student employees and staff, implementing a statement for harmful language, reviewing materials for sensitive content, and evaluating how items in the Digital Gallery can be linked through tags. The first task of this subgroup was to evaluate the terms in the
Digital Gallery, which hosts many of our digital materials. We evaluated 79,000 terms in the Digital Gallery and found 161 terms in need of review. We then separated the terms into categories to illustrate underlying thematic issues (see Figure 1). Forty-five percent of the problematic terms found within the Digital Gallery relate to race and ethnicity, 38% to disability, 10% to gender, 3% to prison and poverty, 2% to sexuality, and 2% to ageism. Following the initial evaluation of these terms, the subgroup organized the terms in a spreadsheet and began amending existing language.

In addition to the review of terms, we also worked towards improving our standards and best practices for the creation of metadata. This work primarily included updating student employee training, as students are the largest group in the Libraries who create metadata for our digitized materials. The subgroup also sought to evaluate and update our input rules, focusing specifically on subject terms and name authorities. UTA Libraries also joined the Library of Congress’ Name Authority Cooperative Program (NACO) as a member of the NACO Texas Funnel. Our work with NACO allows us to create authority records, which increases the visibility of materials relating to underrepresented groups in our collections. Furthermore, we established a new method of making our digital collections and metadata more dynamic by creating tags in the Digital Gallery that link related materials. We are currently evaluating the usability of our first tag, “African Americans in Texas history,” which functions within the keyword-searchable notes field. Tags function separately from subject terms and, because of this, there are factors the committee must consider when implementing this in a larger capacity. We continue to evaluate the functionality of these subject terms and tags.

![Figure 1. Problematic subject headings.](image-url)
We are currently working towards creating a statement of harmful language for all digital collections on the UTA Libraries website. We have evaluated and collected models from other academic institutions for reference in crafting our own statement. We are also working towards implementing a statement that will notify users of the Digital Gallery about content that may be considered sensitive or graphic. There are many instances where inappropriate terms are part of the historical representation of an item, and this statement will help users and researchers understand the context in which terms are used. We are in the process of composing these statements, which will need to be approved by the library administration before implementation.

User guides

As one of the most visible resources our library offers, user guides are a valuable method of demonstrating our institution’s commitment to diversity. This subgroup defines user guides as any resource that assists patrons in the navigation and use of our collections and materials, including both LibGuides and finding aids. The subgroup for user guides recognizes the importance of ensuring diverse representation in the resources we provide. We concluded that the most thorough and comprehensive avenue to pursue these goals was through a two-fold approach: first, to create a framework to review all guides; and second, to implement a process by which guides could be reviewed annually. Although an annual review is a significant undertaking, the subgroup understands that the ever-evolving nature of descriptive language requires frequently revisiting and revising the terminology that we employ. Language quickly changes and preferred terms that were accepted five or even ten years ago may no longer be appropriate.

Our first step in this work was creating a resource for our librarians and subject specialists to consult in an annual review of all guides. We structured this guide to EDI work into three main sections. The first section is an overview of EDI, which defines terms like equity, diversity, and inclusion, and includes suggestions on evaluating the accuracy of and diverse representation in user guides. The second section is a terminology guide to assist librarians in understanding some of the most used acronyms that appear in EDI work such as Black, Indigenous, and People of Color (BIPOC), Asian American and Pacific Islander (AAPI), Lesbian, Gay, Bisexual, Transgender, and Questioning (LGBTQ+), among others. This section of the guide also links to several language style guides that give the preferred terminology of peoples and groups. The third section lists additional resources to assist librarians in their revision of LibGuides.

At the time of our review, the subgroup determined that UTA Libraries offered over 220 library guides, approximately 75% of which were subject-related. We grouped these according to school, with the largest number of guides falling under Liberal Arts, followed by Social Work, Science, and Nursing and Health Innovation (see Figure 2). We expect most changes will be made to guides for Liberal Arts subjects such as History, English, Disability Studies, and Women’s and Gender Studies. We also foresee numerous revisions to guides that fall under Social Work and Nursing and Health Innovation. We believe, however, that revisions will be made across all subjects, even those that may seem more static such as Math, Science, and Engineering. As our librarians conduct an annual review of guides, we encourage them to include resources by underrepresented groups, as we want students to see themselves represented in the fields in which they major.

In establishing a framework for the annual review of LibGuides, we wanted to ensure that the process was both consistent and trackable. We decided to create two forms, a “Report for LibGuide Review and Revisions” form and a “Recommendation for New LibGuide” form. In reviewing each LibGuide, the librarian will complete a “Report for LibGuide Review and Revisions,” which requires the guide’s subject and department, if and why revisions were made, and the approximate number of changes made to the guide. It also asks the librarian to describe any changes that were made and how these revisions increase the representation and visibility of diverse groups. In addition to revising existing resources, we also saw a need for librarians to identify gaps in the coverage of our guides. In reporting the creation of new LibGuides, the librarian will complete a “Recommendation for New
LibGuide” form. This form requests the reasons for the guide’s creation and how the resource will increase the representation and visibility of diverse groups. By utilizing these forms, UTA Libraries can successfully track the number and types of changes that our librarians make as well as the ways in which we are increasing the representation of diverse groups.

Additionally, the subgroup determined that there was a need for a large-scale review of our institutional finding aids. Special Collections has published more than 700 finding aids for our collections, all of which are currently available on Texas Archival Resources Online (TARO). Due to the number of finding aids, the subgroup concluded that an annual review was neither realistic nor sustainable. Instead, we foresee a one-time comprehensive review of all finding aids that focuses on correcting outdated language and subject terms. To assist with the ongoing revision of these guides, we are implementing a system for users to report errors and suggest revisions of language. We envision a prominent “Report Revisions” link on our electronic finding aids that will redirect to a QuestionPro form, an online survey software. This form provides fields for the user to identify the finding aid, describe the harmful or misrepresentative language, and include any suggested corrections or additional comments.

Results

Our committee has been successful in meeting many of our early goals. Most importantly, we have established the framework for these processes, as well as defined the paths towards completing this work. We have identified a procedure for prioritizing the digitization of materials, begun a review of metadata in our catalog and digital collections, and outlined a method of reviewing and revising user guides.
**Digitization**

There has been substantial progress in meeting our goals of identifying and prioritizing the digitization of materials from Special Collections that reflect diverse perspectives. We have identified a list of twenty-six collections to digitize and, in turn, have also identified gaps in our collections. Furthermore, another EDI committee within UTA Libraries has established an amendment to our collecting scope in Special Collections, which supports the acquisition of additional materials and furthers our digitization goals for EDI initiatives. We have also started and made significant progress on our priority list of materials from the twenty-six collections we have selected for digitization. We have begun establishing a list of localized authority files that includes name authorities and subject headings and have grouped these authority files together into categories such as persons, businesses, churches, newspapers and publications, schools, and religious/social/educational organizations. Indexes and city directories will assist us in identifying additional names of persons and entities. We will use these terms and names, most of which are focused on the North Texas region of Dallas, Fort Worth, and Arlington, to search for additional materials for digitization. In order to meet our remaining goals, we need approval from department heads to create a workflow to implement our EDI goals. We are also currently working to train several new hires and assigning specific roles to further our EDI objectives for digitization.

**Metadata**

This subgroup successfully evaluated the terminology in the Digital Gallery and began making changes to the terms. We also joined the North Texas funnel for NACO, which will allow us to contribute new name authorities from our collections to the Library of Congress Name Authority File. The subgroup also updated input rules for digital collection metadata, including subject terms and name authorities, to better control consistency and accuracy. To make searches more dynamic, we have begun evaluating the use of tags in the notes field to link related items. We are still in the process of implementing a harmful content and language statement for the UTA Libraries website.

**User guides**

Although the review of user guides is a large undertaking, this subgroup has made substantial progress in meeting its goals. We have created a framework for reviewing LibGuides through the creation of a resource to guide librarians. We have also created a form that will assist in the review and revision of existing LibGuides as well as one to report the creation of new guides. We plan on implementing an annual review of LibGuides and have established a consistent procedure that enables us to track the number and types of changes that are being made. This allows the review process to be highly visible and supports our long-term goals for sustained reparative work. Our subgroup is still in the process of creating a framework for the review of finding aids. We have discussed our approach to undertaking a large-scale review of these resources but have yet to make any decisions. We have drafted mock-ups of QuestionPro forms that will allow users to submit revisions and recommendations; however, we are still in the process of determining the most effective method of implementation as well as the location of these links on the UTA Libraries’ website.

**Discussion and conclusion**

Six months after the formation of the EDI Committee for Metadata and Digitization, we reexamined our goals, discussed our progress, and identified how we succeeded or fell short of our expectations. We determined that there were three factors that contributed to our success. First, the committee established how we would organize our members and laid out a clear plan
of action. When we first began this work, we took the time to lay out specific paths in approaching our goals and assigned our members steps to complete the work. Furthermore, we made a record of what we wanted to complete, the time frame for these tasks, and the avenues towards meeting these objectives. Second, the committee set explicit goals and measurable outcomes. Early in this process, the committee recognized the importance of measuring our progress and took this into account during our planning process. We wanted to be able to share information and statistics with others about how we are working towards making UTA Libraries a more equitable, diverse, and inclusive environment. Third, we established a sustainable model for continued review and revision. We understand that this type of work is never finished, which is why we implemented a model that allows the work to be continually revisited.

In addition to measuring the success of this committee, we also took note of how we fell short of our goals. It was apparent that we were too ambitious in our expectations and underestimated the extent of our tasks; even with seven committee members, the proposed timeline was unrealistic. In the coming months, however, we are focusing our efforts on accomplishing the goals that have not yet been fully achieved. We are continuing efforts to review subject terms in the library catalog and create a list of guidelines for preferred terms that promote the accurate representation of diverse groups. The committee will review and revise original cataloging policies and procedures to reflect UTA Libraries’ EDI initiatives. We will continue work on crafting a statement on harmful language. We will also begin a review of user guides and make revisions that align with our recommendations. We intend to create documentation that outlines the digitization’s workflow, storage, and metadata. We will employ focus groups to collect feedback on usability within the Digital Gallery and determine best practices for creating greater access to materials that highlight diverse subjects and experiences.

The committee believes that the work we have undertaken can and should be implemented, regardless of the type of institution or repository. Here, we would like to offer some methods of integrating EDI objectives into daily workflows at your institution. First, start the conversation with your stakeholders. Identify who might be most active in your work and contact them to start this discussion. We suggest setting up a meeting with administration and department heads about the value of EDI work and how your institution can make positive changes that increase representation and visibility of underrepresented groups. Second, identify how your institution’s strategic plan and collection strengths coincide with EDI initiatives. Oftentimes the mission, vision, or strategic plan of an institution will naturally support EDI work. If you can demonstrate that this kind of work advances institutional goals or highlights existing collection strengths, you are more likely to gain support. Third, set realistic goals and prepare a plan for achieving outcomes. Faced with the changes that you feel you could make in furthering EDI initiatives, one can easily become overwhelmed with tasks. Prepare a list of what you want to accomplish, break down tasks into smaller ones, and set clear and achievable benchmarks. Finally, we suggest making your work sustainable by incorporating EDI tasks into your daily responsibilities. The easiest way to guarantee that EDI work continues is by ensuring that it is not classified as “special” or “other” work; find ways in which your job duties already naturally support this kind of work and talk to supervisors or administrators at your institution to determine if certain tasks can be written into your position’s responsibilities. The only way that we can ensure that this work towards creating more equitable, diverse, and inclusive libraries continues is by offering our time and effort to such initiatives.

Notes

Disclosure statement

No potential conflict of interest was reported by the author(s).

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