Inclusive Description Recommendations of the Cooperative Metadata Team

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Cooperative Metadata Team
University Libraries
University of South Carolina

Taryn Cooksey, *Collections Manager at South Caroliniana Library*
Amie Freeman, *Assistant Head, Acquisitions & Scholarly Communication*
Katie Hoskins, *Digital Collections Librarian*
Craig Keeney, *Cataloging Librarian at South Caroliniana Library*
Amy Meaney, *Curator at Moving Image Research Collections*
Jillian Smith, *Archival Processing Specialist at South Caroliniana Library*

Authorship statement

The University of South Carolina (USC) Libraries Cooperative Metadata Team (CoMeT) is a small, homogenous group of catalogers, archivists, and metadata librarians at the University of South Carolina, a predominantly white institution; we acknowledge our limitations in evaluating potentially harmful language. Our goals and strategies are based on the work of academic librarians and archivists, with whom we share a desire to describe collections equitably and in a way that respects the lives of those represented, the research experience of our community, and the daily work of our colleagues. We look forward to input from diverse student, employee, and community groups, as well as continued collaboration with the University Libraries Accessibility, Inclusion, and Representation (AIR) Committee.

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Members of the Cooperative Metadata Team:
Katie Hoskins (co-chair), *author*
Craig Keeney (co-chair), *author and editor*
Kate Boyd
Laura Carter
Taryn Cooksey, *author*
Amie Freeman, *author*
Jessica Harvey
Heather Heckman
Amy Meaney, *author*
Scott Phinney
Jillian Smith, *author*
Jodi Spillane
Stacy Winchester

Members of the South Carolina Inclusive Description Group:
Jessica Serrao (chair) and Scott Dutkiewicz, *Clemson University*
Anne Bennett, Lauren Bickel, Brenda Burk, Mary Jo Fairchild, Aaisha Haykal, and Kelly Hudson, C*ollege of Charleston*
Nashieli Marcano and Alyssa Nance, *Furman University*
Katie Hoskins and Craig Keeney, *University of South Carolina*
Logan Cocklin, *Winthrop University*

Travis L. Wagner, *University of Maryland*
Vanessa Kitzie, *University of South Carolina*
Ann Abney (former CoMeT member), *University of South Florida*

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Introduction

“Metadata is a statement about a potentially informative object" (Pomerantz, 2015, p. 26).

Metadata contains components that describe various elements of a resource, such as the title, creator, date, format, and contents. Metadata adds clarity and context to the object or resource being described, and it allows for the discoverability of items when a search is performed in a database or search engine. It can be enormously helpful to users of an object if it is accurate, comprehensive, and unbiased. Metadata is often subjective, however. The individual creating it may have an incomplete knowledge of the object, may have implicit or explicit biases, may be unaware of best practices and current standards, or may be relying on controlled vocabulary terms with significant limitations.

Regardless of how the metadata is created, errors, biases, or changing practices and standards may lead to the broad dissemination of records that are incorrect, offensive, or outdated. Metadata that inaccurately or insensitively describes cultures, people, or artifacts can result in the harmful misrepresentation of communities or individuals.

While no institution will ever be able to describe every object perfectly and sensitively, inclusive description can mediate and repair damage and prevent future harm. Inclusive metadata strives to accurately and respectfully describe resources pertaining to communities and groups underrepresented in higher education and, more specifically, in libraries. As noted in the Frick & Proffitt OCLC Research Report *Reimagine Descriptive Workflows*:

> The terminology used to describe library collections in catalogs is the entry point for many who may be searching for information about their own history, heritage, culture, and spoken or written language. When those library patrons encounter racist, sexist, homophobic, insensitive, or just plain erroneous terminology in the library catalog while conducting a search or while receiving assistance during a reference interaction, it damages credibility and trust in the library and damages our collective brand. (p. 9)

The University of South Carolina strives to “foster access and belonging” (University of South Carolina Strategic Priorities, 2023/28), and the University Libraries endeavors to be “respectful and accessible” and “responsive to changes in user needs” by investing in initiatives that “promote inclusion for and within our community” (University of South Carolina Libraries Strategic Plan, 2022/24). The American Libraries Association’s Cataloging Code of Ethics emphasizes the importance of external cooperation and relationship building when working with metadata, noting that libraries should “collaborate widely to support the creation, distribution, maintenance, and enrichment of metadata in various environments and jurisdictions” (ALA Cataloging Code of Ethics, 2021). The USC Libraries Cooperative Metadata Team (CoMeT) seeks to support these goals by providing guidelines for creating inclusive metadata and remediating existing records. These guidelines will allow for more efficient, timely, and thoughtful processing of materials.

As language and identity evolve, inclusive description work must be a continuous process of reflection, revision, and striving for improvement. To keep up with these changes, a CoMeT subteam will coordinate ongoing inclusive description audits and edits, inform the team of relevant developments from the wider metadata community, and conduct periodic reviews of the inclusive description recommendations.

Guiding Values and Principles

Transparency and accountability

Systems inherit the conscious and unconscious biases of creators and operators. Library descriptions and organizational systems are no exception to this fact.

Library professionals need to address these biases to provide inclusive library spaces, services, and resources.

Library professionals doing reparative description work must be transparent about their efforts, sources, and methods. They must be open to suggestions from the user community and people outside the library profession.

Center the needs of users

Library professionals should proactively identify and remedy descriptive barriers that limit users' success finding resources within University Libraries.

Library professionals should recognize their limitations and knowledge gaps when creating metadata for historically marginalized and underrepresented groups. They should seek out current information about cultural or community needs to create more inclusive metadata.

Prioritize community-created language

Inclusive and reparative description practices seek to identify and address biases and resulting harmful impacts by updating metadata to better reflect language used and recommended by historically marginalized communities.

Language is not static. The best practices and recommendations for inclusive metadata will change as our cultural and social knowledge grows.

CoMeT encourages feedback from members, descendants, and allies of the groups, people, or communities being described.

Key resources

While CoMeT members have identified an array of resources that can assist metadata creators, we want to highlight these two guides as recommended reading for anyone engaged in inclusive and reparative description.

> *A Guide to Conscious Editing at Wilson Special Collections Library*
> Created by the librarians and archivists at the University of North Carolina at Chapel Hill, this document offers key historical and cultural contexts, provides clear recommendations for best practices, and can help librarians better understand how invisible and assumed norms impact historically marginalized communities.

Harvard Schlesinger Library Collection Services: Inclusive and Reparative Language Guide
Created by librarians and archivists at Harvard University, this guide offers concise explanations of common issues found in inclusive and reparative description work and provides recommendations for how to best address them. We recommend reading the entire guide, as it provides a good overview of descriptive principles and practices that metadata creators can incorporate into their work.

Carrying Out Inclusive Description Work

Inclusive description work is retrospective, prospective, and iterative. Existing records are reevaluated from a new perspective, new records are created with inclusive practices in mind, and as perspectives change, existing records and descriptive practices are evaluated again. This cycle moves the University Libraries' collections *forward* in discoverability, for an inadequately described resource is not discoverable.

In reexamining existing records, care must be taken to ensure that the work is not being done in place of or at the expense of describing new or backlogged materials. Units are encouraged to engage in reparative description projects as time allows, using structured internships, student employees, and edit-a-thons to identify, review, and edit records. Units should prioritize specific topics, media types, and collections based on audits like those described in the section on Identifying Records for Remediation. The audit process should always involve the cooperation of both metadata creators and collection curators.

In addition to consulting these guidelines, metadata creators are encouraged to review additional resources and consult colleagues, collection curators, and subject-matter experts when unsure. Metadata creators should exercise their best judgment, guided by the principles of centering user needs and prioritizing community-created language.

A note on self-care

Working with historical materials and outdated descriptive standards is not easy. Even seemingly modern and mundane materials may contain content that makes us uncomfortable. Supervisors should communicate this clearly to anyone reviewing or editing records, especially to students who may not be fully aware of the potentially problematic nature of historical materials. Know that your emotions are valid and practice self-care when needed; take a break and return to the material when you are ready or move on to something else entirely. Making mistakes is human. Do your best to educate yourself and others (gently) and remember that a good-faith effort is better than none.

Locally Supplied Descriptive Elements

Resource descriptions often include text written by a cataloger, archivist, metadata librarian, or student assistant. These supplied descriptions may appear in summaries, scope and content notes, biographical notes, and devised titles for resources lacking a proper title.

The recommendations below are distilled from six style guides for inclusive language:
Bias-Free Language, APA Style
Disability Language Style Guide, National Center on Disability and Journalism
A Guide to Conscious Editing at Wilson Special Collections, University of North Carolina at Chapel Hill
Inclusive Language Guide, APA Style
Indigenous Peoples: Language Guidelines, University of British Columbia
A Progressive's Style Guide, Hanna Thomas & Anna Hirsch

Honor self-identification and community-created language.

Identify people by name, using the name by which they self-identify if known.

Generally, describe people before their physical traits. Be mindful of exceptions based on self-identification and community-created language.

Use the same level of formality when describing people, regardless of gender. Avoid gender-specific titles (Mr., Mrs., Ms., Miss) except in situations where only the person's surname is known and omitting the title could lead to confusion.

Use demographic descriptors only when necessary to provide context and aid in the discoverability of the resource. Avoid making assumptions about people's identities. Exercise caution when describing visual materials especially, as they may depict unidentified persons and lack self-describing text.

When describing groups of people, use the name(s) created and used by members of the group. Avoid pejorative terms created by oppressors, such as those created by white colonizers. Be mindful of exceptions, such as pejorative names that have been reclaimed by individuals or groups. See Appendix A for more detailed recommendations on identifying Indigenous groups.

Use culturally and contextually appropriate descriptors.

Use accurate and respectful language to describe people and events.

Correctly identify people and events relating to colonization, oppression, discrimination, hate, and violence. Avoid euphemistic and inaccurate descriptions of people and events.

Examples:

- Avoid using terms such as "exploration" and "discovery" to describe already-inhabited places.
- Elevate the description of enslaved individuals in white family papers and make clear the role of the family in their enslavement.
- Replace and avoid language that perpetuates Lost Cause mythology.

Place outdated or offensive terms in quotation marks if they are considered necessary for providing historical context and aiding discoverability. (See the following section on Transcribed Descriptive Elements for more information.)

Center subjects' humanity and experiences.

Examples:

- Highlight the lives of the people enslaved by white families when describing collections.
- Identify the University of South Carolina as an historically white university to contextualize the experiences of people of color in its history.

Give preference to active vs. passive language.

Be conscious of passive language that may subtly distance or detach the responsible party (the person committing the action) from their consequences. While the passive voice may be useful at times, particularly to indicate actual uncertainty, use active verbs to clearly indicate responsibility when known.

Example: In the context of violence committed by white authorities against people of color, consider how the passive voice can obscure who the violent actors were. For instance, "several protesters were killed and others wounded in a racial disturbance..." removes any indication of who caused the violence. Such phrasing may even imply that the demonstrators were to blame, or that the violence "just happened." When rewritten as "law enforcement officials shot at demonstrators, killing [number] demonstrators, and injuring several others [number or estimate] ..." clarifies the responsible parties and the scope of the action.

Remove invisible norms.

Apply terms relating to identity and appearance purposefully across subjects, resources, and collections. Apply descriptors equitably to all subjects described, not just those that fall outside of what was historically considered the "norm": white Protestant males.

Example: In a collection where racial identity is important, identify white individuals as such.

Table 1. Terms to Use and Avoid

This table is a starting point; it is neither exhaustive nor prescriptive. The highlighted style guides on page seven can help with identifying more specific terms. The Inclusive Terminology Glossary, a continually updated resource, is also recommended.

In some cases, an individual or group may prefer a term that should otherwise be avoided. In these instances, respect self-identifying language.

Terms to avoid	Terms to try instead
AIDS victim	person with AIDS, person living with AIDS
afflicted with ..., suffering from ..., confined to a wheelchair	with ..., has ..., uses a wheelchair
Afro-American, negro, colored	African American, Black (as applicable)
alien, illegal, illegal immigration	asylum seeker, refugee, undocumented immigrant, undocumented immigration
blind to, deaf to, crippled by	Choose a descriptor that is not a reference to a disability.
Caucasian, White	white ("White" with a capital w is associated with white supremacist movements.)
dwarf	person with Dwarfism
First World, Third World, developing, less developed, underdeveloped, Global North, Global South	Prefer a specific geographic or regional place name.
gypsy	Roma, specific Traveller group
handicap	disability, accessible (as an adjective)
the homeless	homeless/unhoused people, people without homes/housing, people experiencing homelessness
the incarcerated	incarcerated person, person in prison
Indian, American Indian, native	Native American, Indigenous person (prefer a specific group name)
mentally retarded, special needs	intellectual disability, cognitive disability
Mrs. Husband's Name e.g., Mrs. John L. Manning	full personal name e.g., Sally Bland Clarke
the old, the aged, the elderly, old person	older people/person, elderly people/person, seniors
Oriental	specific nationality or other identity used by the person or group
the poor	low-income, people experiencing poverty
primitive, savage, uncivilized	Do not use terms that imply any group of people is less evolved than others.
runaway slave	escaped from slavery
slave	enslaved person
slaveholder, slave owner/master	enslaver
tribe	Tribal nation (when part of an official designation), Indigenous Peoples, community, nation (prefer a specific group name)

Example: Description Field

Letter, 1825 February 12, Charleston, S.C., James L. Petigru to Richard I. Manning, digitized manuscript from the Williams, Chestnut, Manning Family Papers, described in the digital repository

> *Original Description*:
> Letter from James L. Petigru to Richard I. Manning, **relating the situation of Mr. Shaffer of Augusta who purchased Bristow**, not knowing he had been convicted in South Carolina of cattle stealing, sentenced to death, "conditionally remitted in case of his owner sending him out of the State," Bristow **hired to Mr. Whitner "as a hand for the steam boat,"** arrested by the sheriff in Charleston, and requesting RIM to have Bristow released "and remit the punishment of death…on condition that he shall never be found within the State of South Carolina hereafter".
>
> *Revised Description*:
> Letter from James L. Petigru to Richard I. Manning **regarding the situation of an enslaved man named Bristow who was purchased by Mr. Shaffer of Augusta, Georgia**. He had been convicted in South Carolina of cattle stealing, sentenced to death, and "conditionally remitted in case of his owner sending him out of the State." Shaffer sent Bristow to Charleston, South Carolina, **to temporarily labor as an enslaved hand on a steamboat for Mr. Whitner**. Upon arrival, Bristow was arrested by the sheriff in Charleston. In the letter, Petigru claims that Shaffer had no knowledge of Bristow's conviction and **requests Manning return Bristow to his enslaver** "and remit the punishment of death … on condition that he shall never be found within the State of South Carolina hereafter." **The full names of Bristow, Shaffer, and Whitner are unknown.**
>
> *Explanation*:
> In the original description, the focus is on Shaffer, and the term "hired," although commonly used at the time, does not accurately describe the situation. The revised description centers on Bristow's experience. "Hiring" is replaced by a more accurate description of Bristow's "employment," and Shaffer is clearly labeled as an enslaver rather than a victim. Lastly, it is made clear that the partial names used were the only ones available to the metadata creator.

Transcribed Descriptive Elements

Transcribed elements come directly from the resource and may also be called creator-supplied or original text. Transcribed elements commonly appear in the title, alongside the descriptive elements in the transcript, and in quotes embedded in locally supplied elements.

Where metadata standards require transcription, record the text as it appears. When the text includes outdated or offensive terms, consider clarifying the source by enclosing it in quotation marks and/or adding a note stating the source (applying this recommendation may depend on the descriptive standards and metadata platforms used).

In especially egregious cases, consider also adding a contextual note after consulting with collection curators and subject matter experts. In shared bibliographic records, namely those shared among Partnership Among South Carolina Academic Libraries (PASCAL) participants, such notes should be added in the WorldCat record to avoid potential overlay.

Transcripts

Do not remove or otherwise censor offensive language in the physical or digitized resource itself. Likewise, when directly transcribing textual or linguistic content (as with oral histories, for example) maintain the original text as it appears in the resource. Transcripts of audiovisual and printed content are representations of the original materials and are important access points for people with disabilities or in any situation where the original content cannot be accessed.

Consider adding a content note to alert users to the presence of outdated or offensive language. (See the section on content advisories for more information.)

Titles

The title is always required, regardless of descriptive standard or resource type. It should be transcribed as it appears on the resource without alteration or redaction. For titles containing offensive language, consider stating the source in a note, even when it is not required.

For resources lacking titles, devise one following the recommendations for locally supplied descriptive elements. Exercise caution in devising titles for visual materials especially; do not base them on the assumed identities of the persons depicted. When including offensive language from the resource in the devised title, clarify the source using quotation marks and/or adding an explanatory note.

Other transcribed elements

Offensive terms may also appear in a resource's table of contents, publication information, and statement of responsibility. Transcribe the text as it appears and clarify the source using quotation marks and/or adding a note (this recommendation may depend on the descriptive standards and metadata platforms used).

Quoted text in other descriptive elements

When providing descriptive elements such as a summary or biographical note, archivists and librarians may choose to quote from an original or outside source. Consider excluding or modifying (with square brackets) quotations that include offensive language or misrepresent people and events.

Examples: Title Field

Thoughts on the religious instruction of the negroes of this country, monograph held by the South Caroliniana Library, described in the library catalog

> *Title*:
> Thoughts on the religious instruction of the negroes of this country.

Suggested Note:
Title transcribed as it appears on title page.

Explanation:
The title is transcribed directly from the resource following Resource Description and Access (RDA) guidelines for bibliographic records. Identifying the source of the title helps users understand where the title comes from and why the outdated term "negroes" still appears.

Golliwog parade: piano solo, music score held by the South Caroliniana Library, described in the library catalog

Title:
Golliwog parade : piano solo

Suggested Local Note:
Cataloging agency recognizes "golliwog" as an outdated and racially offensive term.

Explanation:
The title is transcribed directly from the resource following RDA guidelines. The note serves to acknowledge the offensive nature of the term "golliwog." Such notes should only be applied locally until further notice after consulting with collection curators.

Example: Quoted Text in the Description Field

The American Indian: his life and customs, monograph held by the Irvin Department for Rare Books and Special Collections, described in the library catalog

Description:
"Thus runs the story of the life and customs of the American Indian as he was in the days of Columbus" -- p. 16.

Explanation:
In providing this optional summary note, the cataloger has chosen to quote directly from the resource. The text, while not reflective of current terms, provides a sense of the resource's content and tone. Enclosing the statement in quotation marks helps clearly identify the source.

Controlled Vocabularies: Subjects

Library of Congress Subject Headings (LCSH) and Genre/Form Terms (LCGFT) are used throughout the USC Libraries to provide access to resources. LCSH and LCGFT are controlled vocabularies that bring together terms representing concepts and disambiguate similar terms representing different concepts. These large, complex vocabularies cannot be updated as quickly as language evolves and, as general vocabularies, cannot meet the needs of all collections, especially those with unique materials, user communities, and research needs. Furthermore, LCSH retains terminology and conceptual

underpinnings that reflect its origin in a society and profession that excluded non-white communities, cultures, and systems of knowledge. To effectively describe collections in ways that eschew these harmful ideas, metadata creators must continually address outdated subject headings, making use of freely available alternative vocabularies and actively participating in improving subject headings.

Revisit and revise outdated and offensive controlled headings.

Replace incorrect subject headings (LCSH or otherwise). If an accurate LCSH does not exist, replace the incorrect heading with one from an alternative vocabulary.

As LCSH and alternative vocabularies are updated, ensure local instances of controlled terms are also being updated.

In cooperative metadata environments, make changes and additions to shared records whenever possible (editing a record in WorldCat rather than only in the local catalog, for example). Changes and additions using subjects from local vocabularies (or from alternative vocabularies lacking an official source code) should be made locally rather than in the shared record.

Use alternative vocabularies when relevant LCSH are inaccurate, insufficiently specific, obsolete, or offensive (see Table 2).

There is conceptual overlap among LCSH and the various alternative vocabularies. When the LCSH is adequate and appropriate, apply it rather than an alternative term.

Supplement insufficient LCSH, leaving them in place and assigning an additional subject heading or headings from an alternative vocabulary.

Assign subject headings from alternative vocabularies that are the most relevant to the resource being described. For example, when a supplemental heading is needed for an LGBTQ+ concept, apply one from *Homosaurus: An International LGBTQ+ Linked Data Vocabulary*.

Assign genre/form terms from alternative vocabularies to bring out specific resource types beyond those included in LCGFT, such as material types that are specific to a cultural group or prejudicial works in any format.

In cases where no controlled vocabulary term is adequate, create a local subject heading. Development and application of local subjects should be based on research on the topic and analysis of user needs based on community engagement.

Improve the national subject authority file through Subject Authority Cooperative (SACO) participation.

Propose changes to subject headings that are inaccurate, obsolete, or offensive.

Propose new headings for subjects that are not yet represented.

Participate in SACO training workshops and use the resources and community of the Cataloging Lab.

Table 2. Recommended Alternative Vocabularies

Refer to these vocabularies when supplementing LCSH and LCGFT. Use the source code to identify terms whenever possible.

	Published or updated	Source code	Example
Disability			
Disability Language Style Guide National Center on Disability and Journalism	2015	--	Disability Access Symbols *Assigned when LCSH **International Symbol of Access** is too specific but broader term **Signs and symbols** is too broad.*
LGBTQ+			
Homosaurus: An International LGBTQ+ Linked Data Vocabulary Digital Transgender Archive	2022	homoit	Gender affirming surgery *Assigned to supplement LCSH **Gender reassignment surgery**.*
Race and ethnicity			
African Studies Thesaurus African Studies Centre Leiden	2012	ascl	Fyer language *Assigned to supplement LCSH **Ron language** for a work about a specific language belonging to the Ron language family.*
American Folklore Society Ethnographic Thesaurus American Folklore Society; American Folklife Center of the Library of Congress	2018	afset	hand sewing *Assigned to supplement broader LCSH **Sewing**.*
Indigenous Peoples Subject Headings Project Phillips Library, Peabody Essex Museum	2022	--	Cherokee *Assigned to supplement offensive LCSH **Cherokee Indians**.*
Genre/form terms			
Controlled Vocabulary for Rare Materials Cataloging Rare Books and Manuscripts Section, Association of College and Research Libraries	2022	rbmscv	Anti-immigrant works *Assigned to identify prejudicial works of a particular nature. There is no such term in LCGFT.*

Examples: Controlled Vocabularies: Subjects

(Subjects displayed in MARC21 format to illustrate indicator and source code usage.)

Mineral resources of the Negro Bill Canyon Wilderness study area, Grand County, Utah, monograph described in the library catalog

> *Current Library of Congress subject headings include*:
> 650 #0 $a Mines and mineral resources **$z Utah $z Negro Bill Canyon Wilderness**.
> 651 #0 $a Grandstaff Canyon Wilderness Study Area (Utah)
>
> *Suggested revised subject headings*:
> 650 #0 $a Mines and mineral resources **$z Utah $z Grandstaff Canyon Wilderness Study Area**.
> 651 #0 $a Grandstaff Canyon Wilderness Study Area (Utah)
>
> *Explanation*:
> In the Library of Congress Subject Authority File, both **Negro Bill Canyon Wilderness Study Area (Utah)** and **Negro Bill Canyon Wilderness (Utah)** redirect to **Grandstaff Canyon Wilderness Study Area**. The heading changed from **Negro Bill Canyon Wilderness (Utah)** to **Grandstaff Canyon Wilderness Study Area (Utah)** in 2022, and the subdivision form is **Utah--Grandstaff Canyon Wilderness Study Area)**. The subject in the bibliographic record should be updated to match the current authorized heading.

Introduction to Handbook of American Indian languages, monograph described in the library catalog

> *Current Library of Congress subject heading*:
> 650 #0 **$a Indians of North America** $x Languages.
>
> *Alternative controlled heading from the Indigenous Peoples Subject Headings Project added to supplement*:
> 650 #4 **$a Indigenous peoples $z North America** $x Languages.
>
> *Explanation*:
> "Indians of North America" is a valid Library of Congress subject heading, but many Indigenous people consider it a biased term. In the alternative vocabulary Indigenous Peoples Subject Headings Project (Phillips Library, Peabody Essex Museum), **Indians of North America** is cross-walked to **Indigenous peoples--North America**. (While **Indigenous peoples** is established in LCSH and subdivisible by geographic location, it conflicts with the subject **Indians of North America**.) Adding “Indigenous peoples--North America—Languages” as a heading can supplement the LCSH, which is retained in anticipation of it being updated.

Pride across the southeast, an account of South Carolina's first pride march in 1990, held by the South Caroliniana Library, described in the library catalog

> *Current Library of Congress subject heading*:
> 650 #0 $a Gay liberation movement
>
> *Alternative controlled heading from Homosaurus added to supplement*:
> 650 #7 $a Gay pride $2 homoit
>
> *Explanation*:
> "Gay liberation movement" is not offensive, per se, but the term has fallen out of use. The alternative heading "gay pride" improves discoverability by better reflecting modern usage.
>
> *[A caveat: there is no set formula for determining when and if a term has fallen out of use. In this instance, the decision was based on the age of sources cited in the LC subject authority record, the definition of "gay liberation" in Homosaurus, and informed conversations with colleagues. In other words, metadata librarian's judgment.]*

Controlled Vocabularies: Names

General Concepts

Identify corporate bodies, families, and persons consistently within and across platforms.

Use authorized headings where they exist.

If no authorized heading exists, use the form of name preferred by the author based on their works. The key is following patterns and being consistent.

> Examples:
> - Access point for a person with a surname: Carlos, Wendy
> - Access point for a person without a forename: Confucius
> - Access points for corporate bodies:
>   - Humanities Council SC [body is not subordinate to a larger one]
>   - University of South Carolina. Libraries [library is subordinate to the larger institution, the university]

Also consider asking a librarian trained in creating and editing authorized headings to create a new authorized heading.

Revisit legacy descriptions where possible to name members of historically marginalized communities. In instances where a person's full name cannot be found, add a descriptive note.

> Example: Identified only as John.

Recording Names of Living Persons

A person's full body of work should be accessible using their current name.

Use former names as little as possible.

Where creators use pseudonyms in lieu of their real names, identify them by their pseudonyms.

Use the same level of formality for describing people, regardless of gender.

When providing biographical information, ask the question, "Do I need to include this information to identify this person?" In most cases, metadata creators can omit details like private phone numbers and residential addresses.

Recording Names of Deceased Persons

In addition to observing the above recommendations, note the following:

Be cautious in applying gender labels to deceased persons, as their self-identification may not be known.

Name enslaved persons where possible, distinguishing enslaved persons from enslavers. Legacy descriptions have traditionally focused on plantation owners, when in fact plantation records may be the best and only source of information on enslaved African Americans. Provide biographical details where possible to re-center narratives and increase access.

Recording Names of Corporate Bodies

Record corporate body names as they appear in transcribed fields. In instances where the corporate body has changed names, consider adding a note with the current name.

> Example:
> Creator: South Carolina State Hospital for the Insane
> Resource Title: Annual report of the South Carolina State Hospital for the Insane
> Note: Organization is currently known as the South Carolina State Department of Mental Health

(See Appendix C for a full example of a revised name authority record.)

Classification: Library of Congress

(See Appendix B for Dewey Decimal Classification.)

Library of Congress (LC) Classification is the most widely used classification system for physical resources held across the USC Libraries. The problems with LC Classification are fundamental; its system of organizing information reveals that its creators considered non-white people to be topics of study rather than readers themselves (Adler, 2017). This implicit bias has extended to other marginalized groups, as evidenced by their placement in the classification schedule and the terms used to label related topics.

This is most visible in the classification of Cutter numbers where the letter portion is determined by the first letter or letters of a name, title, population group, or other topic. When a name or other term changes, the letters in the call numbers are no longer appropriate--representing outdated or offensive labels. Two especially problematic Cutters that were used throughout the classification schedule to represent “Negroes” and “Orientals” have been canceled but call numbers with these Cutters persist in the catalog and on the shelves.

Be purposeful when classifying materials by or about people belonging to marginalized groups.

Check the classification schedule before accepting or assigning a class number and Cuttering for names or topics.

Consider the effect that a resource's location in the organization of materials could have on its potential access and the effect that outdated or offensive labels built into a resource's call number may have on a library user.

Local call numbers should make sense for local collections and users.

They should not create a barrier to access due to their location on the shelf list or the letters used to represent people.

Remember that local call numbers do not need to match those of other libraries.

Do not use canceled class or Cutter numbers for new materials.

These numbers can often be found in the Library of Congress Classification Approved Monthly Lists and Library of Congress Subject Heading Approved Monthly Lists. In the classification schedule, canceled numbers are enclosed in parentheses.

Reclassify materials with canceled class or Cutter numbers,

beginning with those for "Negroes" and "Orientals."

Improve Library of Congress Classification.

Use the resources and community of the Cataloging Lab to identify problems, discuss solutions, and advocate for official changes to the LC Classification schedule.

Example: Library of Congress Classification

The Negro in Brazilian society, monograph described in the library catalog

> *Current call number*:
> F2659.**N4** F413

Suggested revised call number:
F2659.**B53** F413

Explanation:
The class number F2659**.N4** is canceled in the Library of Congress Classification schedule and has been replaced by F2659**.B53**. The library's copy should be reclassified to reflect this change.

Uncontrolled Keywords

Uncontrolled keywords are descriptive tags that do not match prescribed or standardized vocabulary terms. Instead of selecting from a predetermined list of terms to describe an object, uncontrolled keywords are usually selected by an individual to represent the object to the best of their knowledge. Uncontrolled keywords are often chosen by the author(s) or publisher of the work. For example, authors of scholarly articles may submit keywords with their manuscript, which are then included in the metadata record for the article once published. Authors of dissertations and theses similarly select and provide their own keywords without the assistance of a controlled list.

For consistency in indexing and discoverability, keywords should be transcribed exactly from the source material, with the author or publisher as the authority. Additional descriptive keywords may be included in some rare circumstances to allow for broader and more inclusive metadata. The terms should draw from the resources recommended in this document.

Digital and Digitized Images

The University Libraries' digitized materials contain images and videos of racial violence, death, deceased persons, and other graphic, disturbing, and harmful imagery. The discussion among cultural heritage institutions about how best to present this content is ongoing. Without censoring harmful imagery, libraries must still consider the experience of users who encounter these materials online. See the following section on Content Advisories & Contextualizing Statements for CoMeT's recommended approach.

Content Advisories & Contextualizing Statements

Content advisories are statements that alert users of the potential for psychological harm as they engage with material. The content types that necessitate a warning typically contain harmful language and imagery or cover a potentially upsetting topic. According to the University of Michigan's chart *An Introduction to Content Warnings and Trigger Warnings*, the most common content warnings address hate speech, violence, assault, illness, death, and suicide.

As they relate to describing resources, contextualizing statements can educate users on the influence of time, environment, societal norms, and personal biases on content and, sometimes, even the housing institution's historical and present role and intent in relation to it.

Contextualizing statements may be extensions of broader institutional statements, or they may apply to specific items within collections. The University of California San Diego Library Digital Collections provides an example of a contextualizing statement linked to the library's broader statement (via the Dr. Seuss Political Cartoons description) and woven into descriptive metadata (in the Sylvester M. Lambert Photographs). By noting the cultural significance of death in some Aboriginal communities, the statement forewarns users who might find the content upsetting, and it explains why an alert is necessary. By requiring viewers to consent to view images, the Sylvester M. Lambert Photographs also offer an example of how low-level mediated access can be used to reinforce a content warning.

Through the use of content advisories and contextualizing statements, the USC Libraries will: a) describe the collections more thoroughly and accurately in order to reduce unnecessary harm; b) acknowledge and respect our diverse population of researchers by giving them the tools to make informed decisions regarding their own mental health; c) clearly articulate the role of harmful content in education while maintaining an integrous historical record; and d) facilitate a welcoming environment for more honest and productive dialogue.

Challenges and Considerations

The debate over whether content advisories are a boon or hindrance to educational spaces is an ongoing and contentious one. Opponents associate them with censorship while proponents view them as an extra empathetic layer of information that provides learners with agency through the power of choice (Dilveko, 2015). Even though the subject of content advisories has been a burgeoning corner in academic discussion since around the early to mid-2010s (Rogers, 2022), research in the area is still new. The few studies that are available suggest that harmful content warnings have only slight to no positive effect, all while the demand for and use of them in educational spaces has grown steadily (Bridgland et al, 2023; National Coalition Against Censorship, 2020; Rogers, 2022; Swanson et al, 2019).

These conditions make an organized, purposeful approach to adopting content warnings in descriptive work of utmost importance. As the University Libraries move forward in an earnest effort to implement content warnings, there are a few things to keep in mind.

1. These alerts, where used, must be appropriate, informative, and visible.
2. Metadata creators should have consensus on what falls under the umbrella of harmful language and imagery and the kinds of content the warnings will target. A list for creators' reference is advised.
3. Collaboration should extend beyond the collecting units to include Communications, the Accessibility, Inclusion, and Representation Committee, and other stakeholders.
4. This effort will take time.

Recommended approach

When creating and utilizing advisories or contextualizing statements, CoMeT recommends employing a "multi-tiered approach" inspired by the formats presented in UNC's *Guide to Conscious Editing at Wilson Special Collections Library* and the proposed strategies in Clemson University's *Inclusive Description Task*

Force Report. This approach allows librarians and archivists the flexibility to use as many or as few warnings as they want based on their needs.

Inclusive Description Statement: a broad statement on its own webpage that outlines the institution's values, provides historical and contact information, and explains the library's relationship to and responsibility towards harmful content. This statement should align with University Libraries' Values Statement (more specifically, the "What users may see in our collections" section of the Access, Inclusion and Representation statement) and link to a feedback form. It may also explain the specific guidelines and policies that drive collecting, preservation, and labeling practices. The inclusive description statement should be a collaborative effort that rarely changes.

> Examples: Black Women's Suffrage; College of Charleston; Princeton University Library

Blanket Statements (for collection-level descriptions): brief, adaptable statements that apply broadly to collections. They may be used across multiple collections and departments and are as likely to appear on an exhibit's entry plaque as in digitized collections.

> Examples:
> *(Generic) Some content from this collection contains harmful, biased, or disturbing language and/or imagery. This content is not a reflection of the University of South Carolina Libraries' values. In keeping with best practices and the Libraries' mission to provide comprehensive information, this content is available as a vital part of the historical record. For more background on the Libraries' measures and stance regarding harmful content, please see our Values Statement. We are in an ongoing process of addressing outdated and harmful language within our collections and welcome feedback here.*
>
> *(Adapted) Some content from this collection contains harmful language and imagery related to historical antisemitism. Transcripts within this collection also contain descriptions of sexual and racial violence. This content is not a reflection of the University of South Carolina Libraries' values. In keeping with best practices and the Libraries' mission to provide comprehensive information, this content is available as a vital part of the historical record. For more background on the Libraries' measures and stance regarding harmful content, please see our Values Statement. We are in an ongoing process of addressing outdated and harmful language within our collections and welcome feedback here.*

Content Notes (for items within a collection): statements created in consultation with collection curators and subject matter experts concerning specific items. Researchers may see these notes at the item-level within finding aids, transcripts, digital collections, and on exhibit labels.

Examples:
Content note: Cartoon depicts antisemitic propaganda based on stereotyped physical characteristics.

Content note: The following transcript describes sexual and racial violence from pages 43 to 56.

Thumbnail for Digital Items: For Digital Collections at USC Libraries the text "Sensitive or Graphic Content" should replace the thumbnail for specific digital images that appear in the results list. A content note should also appear, both in the full record view and in the brief view on the results page. The note should describe the nature of the content and inform users that they can view it by clicking through to the full record.

Example text:
Content note: Image contains text that is racially harmful. This content is accessible upon clicking through to the full record.

Example from the digital repository:
I'll dance my way right back to dixieland
The front cover of this piece of sheet music depicts stereotyped minstrel imagery. The text "Sensitive or Graphic Content" appears as the thumbnail for the item in the results list, along with the note: "Content Note: Illustration contains racist depiction of African Americans. This content is accessible upon clicking through to the full record."

Identifying Records for Remediation

Plan for identifying and updating records.

The remediation process will be ongoing. Units are encouraged to set up workflows that work best for them. When planning workflows, consider:

- how to prioritize terms and conduct audits to identify records
- where and how problematic terms should be noted, who should be alerted, and who will make necessary updates once identified
- acute issues, such as discoveries made during the normal course of work, or terms reported by users via the feedback form (see Transparency section), email, in-person interactions, or other methods. In these instances, determine:
    - who should be alerted to the issue
    - where and how the problematic term should be noted
    - who will make necessary updates
    - how to document records and terms updated on this as-needed basis (see Documentation section below)

The remediation process will begin with an audit to identify individual records containing terms known or expected to be problematic. Units can decide whether to conduct a full audit before remediating records or approach the process one term at a time.

- See CoMeT's Preliminary Audit Report for a detailed look at the step-by-step audit process.
- See Clemson University's Inclusive Description Task Force Report, Appendix 2, for a list of potential search terms. This list is a starting point, and units are encouraged to expand their audits based on the unique content in their collections.
- Decide how to prioritize terms for remediation. Units can decide what resources are to be dedicated to remediating records. In the case of limited resources, consider prioritizing terms expected or known to be problematic.
- Search relevant databases for selected terms. Automated searches can identify records, but CoMeT does not recommend batch replacing terms without reviewing them. Controlled headings, which are routinely updated, are exceptions.
- Evaluate results to determine if records need updating. Consider the context in which terms appear, as there may be instances where an otherwise problematic term is appropriate (as part of a proper name or title, for example, or a longer word).
- Keep notes on all reviewed records, even when remediation has been deemed unnecessary. This will prevent duplicating effort in the future.

When updating a record, the editor should document the change as described in the Documentation section below. The editor should also check any other locations containing records that describe the same resource. When editing the bibliographic record in the local catalog, review and update other locations where the text may exist, including finding aids, collection landing pages, digital exhibits, and any other related web pages, etc. For bibliographic records shared among PASCAL participants, edit the WorldCat record to avoid potential overlay.

Documentation

Document reparative description work as it occurs.

Keep the documentation in a shared location accessible to everyone responsible for reviewing and editing metadata. As records are reviewed and edited, the individual completing the work should update the documentation. This step in the process is especially important in situations where questions arise about changes made to records.

Document both metadata reviews and metadata edits.

Use a spreadsheet when auditing records containing a specific keyword or within a specific collection. Records may be flagged for additional evaluation or remediation. For each record, include at minimum the following information: unique identifier, title, name of reviewer, date, findings, and proposed action.

Use separate spreadsheets to track edits for each of the metadata platforms (library catalog, digital repository, etc.), as identifiers and metadata elements differ among them. Edits may include revising, removing, and adding metadata, including controlled vocabulary terms and content notes, for inclusive description. For each record, include at minimum the following information: unique identifier, title, name of editor, date, and description of edits.

Preserve previous versions of records.

It is not necessary to record in the spreadsheet the full before-and-after text of the metadata that has changed. For systems that do not provide versioning of records, save the original records in pdf format before editing. Store the original records in the same location as the spreadsheet.

Transparency

With transparency as a guiding principle, inform users of the work being done and invite them to participate, from reading about potentially harmful content, to submitting an online form to report harmful content, to participating in an edit-a-thon or by completing an internship focused on inclusive description.

Inclusive description statement

Publish a library-wide inclusive description statement that alerts users to the presence of harmful language, especially in archives and special collections, and informs them of the steps librarians and archivists are taking to remediate harmful resource descriptions and contextualize harmful language and imagery.

Feedback form

Give users the opportunity to share their reactions to the content they encounter through a feedback form. For ease of access and increased visibility, the feedback form should be accessible via the library-wide inclusive description page and in collection- and item-level resource descriptions. Review reports as they are received and take appropriate action. Follow up with users about actions taken if they indicate that they would like to be contacted.

Documentation as communication tool

Use the documents created while reviewing and remediating records to communicate to stakeholders the work being done.

Community engagement

Engage the student community by organizing inclusive description internships and edit-a-thons, during which students can review records for harmful, offensive, and outdated content. Depending on their level of metadata experience, they may also suggest or make edits.

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Appendix A. Identifying Indigenous Americans

Guidelines are paraphrased from the *Indigenous Peoples: Language Guidelines*, from the University of British Columbia.

People vs. Peoples

"People" is the plural of person. “Peoples” is used for multiple distinct groups of people.

Capitalization

Capitalize: Indigenous, Native (or Native American), Indian Country, First Nations, Aboriginal, Indian, etc.

Using and Avoiding Terms

Some terms are considered more acceptable than others. Be respectful of and defer to how groups name themselves.

Use the specific over the general whenever possible. Be sure to use accurate terms or names preferred by a community. Keep in mind that just because a name or term of an Indigenous group is widely used, it does not mean it is the preferred nomenclature by members of that community. This may take some effort and research to determine.

Be respectful of how an individual identifies. Defer to the preferences of the groups or individuals whenever possible. Some people may find an otherwise widely used term to be problematic or offensive. Some terms or phrases may be considered acceptable when used by community members but offensive or inappropriate when used by non-community members. There is no single way that all individuals or all communities identify, and no single opinion about which terms are appropriate or inappropriate.

Do not refer to Indigenous peoples as “belonging” to a country (such as “America’s Indigenous population” or “Canada’s First Nations...”).

Keep in mind that the term “nation” may not apply to all Indigenous groups. It is an accurate term for many communities, and its use is important in recognizing and respecting the sovereignty of Native nations. However, do not assume it is always applicable, as the concept of nationhood or national groupings may not apply to some communities and may indeed be offensive to specific groups.

Indigenous

“Indigenous” is globally becoming the preferred term when a general term is necessary, or when more specific names are unknown. This should be an acceptable term to use in most cases, though a specific term is better when possible.

Indian or American Indian

Despite no longer being the preferred term, “Indian” is still a common legal term, and it will often be contained in laws or the names of government entities. Some individuals or groups may continue to use “Indian” to refer to themselves, but the term is considered offensive by many. Use only when part of a

proper name, legal term, or when otherwise specifically called for. Do not use it as a general umbrella term, or without an explicit reason for choosing it over others. "American Indians and Alaska Natives" is a common term, especially in the context of federal or state government recognition.

Native

Still in use in some legal contexts or proper names but has mostly fallen out of favor as a general term. Use "Native" (capitalized) as an adjective, not a noun.

Aboriginal

Not usually a term used in the United States. The term is used in Australia and Canada in specific circumstances. Use only when the term is clearly appropriate, and in those cases, use only as an adjective, not a noun. Do *not* use "Aborigine."

In Canada: First Nation or First Nations

Never use the term "Indian" to refer to a First Nations individual. Note that First Nation "technically refers only to those who have Indian status under Canadian law," and that not all Indigenous communities in Canada use this term to refer to themselves.

Do not refer to Métis and Inuit individuals as First Nations.

"Métis." The term is both singular and plural and can be used to refer to individuals or groups).

"Inuit." Note that Inuit is plural. The singular of "Inuit" is "Inuk." Use "Inuit," not "Inuit people," as the term translates to "the people."

"Eskimo" is considered derogatory by the Inuit and should *not* be used.

Reservation or Reserve (Canada)

Refers to a geographic boundary of land set aside by the federal government and is not likely to be synonymous with a group's traditional territory. Should not be used to refer to a community of people.

Refer to the ***Language Guidelines*** for more guidance about land territories and other cultural terms such as "totem pole."

Potential resources for identifying preferred names of Indigenous groups within the United States

Note that the following resources are not comprehensive lists. They include only groups with membership in the National Congress of American Indians or that are recognized by the United States federal government.

National Congress of American Indians Tribal Directory

From the NCAI website: "NCAI was established in 1944 in response to the termination and assimilation policies the US government forced upon tribal governments in contradiction of their treaty rights and status as sovereign nations. To this day, protecting these inherent and legal rights remains the primary focus of NCAI."

Indian Entities Recognized by and Eligible to Receive Services from the United States Bureau of Indian Affairs
Published by the Bureau of Indian Affairs (BIA), this is “the current list of 574 Tribal entities recognized by and eligible for funding and services from the Bureau of Indian Affairs (BIA) by virtue of their status as Indian Tribes.” These are all federally recognized tribal nations.

Note that this list does not include entities with only state recognition, or any other communities.

This list can be especially useful as the entries also include previously listed names alongside the current registered name. It may be worth verifying that the name registered on the BIA list is indeed the preferred one for that community.

Appendix B. Classification: Dewey Decimal

Of USC Libraries, only the South Caroliniana Library uses Dewey Decimal call numbers. At some distant point in the future this may no longer be the case, but in the meantime, it helps to be aware of some of the issues that can arise when describing materials relating to historically marginalized communities.

The limitations of the Dewey Decimal classification system are inherent in its design and are reflective of the biases of its designer Melvil Dewey. Religious works, for example, are classed 200-299. Of the nine subcategories, eight pertain to the Christian religion, with all non-Christian religions relegated to the last subcategory. A similar criticism may be made of the category for ethnic groups (305.800-305.89). In recent decades, activist-minded librarians have taken steps to address some of the Dewey Decimal system's more egregious shortcomings.

Materials about LGBTQ+ individuals

The following Dewey call numbers are demeaning and should be avoided:
132: mental derangements
159.9: abnormal psychology
301.4157: "abnormal sexual relations"
301.424: study of sexes in society
306.74: conflating homosexuality with prostitution
363.49: homosexuality as a social problem
616.85834: neurological disorders

The following call numbers are appropriate and respectful:
306.76: Sexual orientation, transgender identity, intersexuality
306.762: Asexuality
306.764: Heterosexuality
306.765: Bisexuality
306.766: Homosexuality
306.7662: Male homosexuality
306.7663: Lesbianism
306.7681: Transgender identity and intersexuality

When legacy records containing outdated classification numbers are encountered, re-classify using the preferred numbers.

Materials about Indigenous Americans

The use of the call number 970.00497 (corresponds with the Library of Congress subject heading "Indians of North America") has been widely criticized for lacking specificity and implying Indigenous Americans are a vanishing people.

The following call numbers are available as alternatives:
305.897: American native peoples—Social aspects
307.772: Tribal communities
323.1197: For works on the civil rights of Indigenous Americans (use instead of 970.5)

497: North American native languages
920: For biographies of Indigenous Americans (use instead of 970.2)
974-979: For specific states of United States

Catalogers also have the option of adding “97” to Dewey call numbers (371.82997 for Indigenous American schools, for example) to move materials out of the history section and arrange them more widely throughout the collection.

The Dewey Decimal classification system does not reflect indigenous approaches to organizing information, and changes to the classification schedules will have only limited impact in remedying the situation. Catalogers are encouraged to stay informed on this evolving issue.

Appendix C. Example: Controlled Vocabularies: Names

Authorized heading for Florence Rubert Rossi, previously established as Florence Rubert Wray (*displayed in MARC21 format to illustrate indicator and source code usage.)*

010 n 86848702
040 DLC ǂb eng ǂe rda ǂc DLC ǂd OCoLC ǂd ScU
046 ǂf 1916-01-16 ǂg 2010-04-27 ǂ2 edtf
1001 Rossi, Florence Rubert
370 Manhattan (New York, N.Y.) ǂb Little Rock (Ark.) ǂ2 naf
372 Editing ǂa Poetry ǂa Publishers and publishing ǂ2 lcsh
373 Arkansas Writers Conference
373 National League of American Pen Women. Northwest Arkansas Branch
373 University City Poetry Club (Fayetteville, Ark.)
374 Editors ǂa Poets ǂ2 lcsh **[gendered subject headings not used]**
[375 field now deprecated—not used]
377 eng
4001 Graves, Florence Rubert
4001 $w nne $a Wray, Florence Rubert **[reference to previous name is necessary here]**
670 nuc86-78815: Poetry Arkansia 1964, c1964 ǂb (hdg. on RPB rept.: Wray, Florence Rubert; usage: Florence Rubert Wray)
670 Lowcountry tides, 2022: ǂb title page (Florence Rubert Graves)
670 Ancestry.com, January 24, 2024 ǂb (Florence Rubert Graves; Florence R. Graves; Florence Lillian Rubert; Florence L. Rubert; Florence Graves; Florence Lillian Rossi; Florence Lillian Rubert Wray; Florence Rubert Wray; Florence Rossi; Florence R. Rossi; born January 16, 1916 in Manhattan, New York State to Harlem George Rubert and Florence Inez Cadugan; died April 27, 2010 in Little Rock, Arkansas)
670 Findagrave, January 24, 2024 ǂb (Florence Lillian Rubert Rossi; Florence Lillian Rubert; wrote poems, feature articles, book reviews; edited and published other writers' works through Rubert Publications, Canyonland Graphics and the Bella Vista Press; served as an officer with the Arkansas Writers' Conference, Northwest Arkansas Branch of the National League of American Pen Women, and University City Poetry Club, Arkansas; memberships included the Academy of American Poets, American Poetry League, Poets Roundtable of Arkansas, and Ozark Writers and Artists Guild, among others) ǂu https://www.findagrave.com/memorial/51831288/florence-lillian-rossi **[gendered pronouns not used; personal details like street addresses and family members' names not included]**
670 OCLC, January 24, 2024 ǂb (headings: Rossi, Florence Rubert; Wray, Florence Rubert; usage: Florence Rubert Rossi; Florence Rubert Wray)