Exploring User-Informed Approaches to Enhancing Library Metadata for the LGBTQ+ Community

Introduction

Researchers from the University of Tennessee, the University of Missouri, and Dominican University request $392,110 for a three-year Applied Research Grant that responds to IMLS' National Leadership Grants for Libraries Goal 2 to build capacity of libraries and archives to improve community well-being and strengthen civic engagement, and specifically Objective 2.1, efforts that increase equity and access. As members of a marginalized group, LGBTQ+ individuals face particular barriers when accessing public services, including access to information through the library. This project seeks to employ a user-based approach to understanding and meeting the needs of this group of library users. Specifically, this project addresses the following research questions.

RQ1: How do adult LGBTQ+ library users understand and make use of current library catalogs and metadata?

RQ2: How could this metadata be enhanced to better reflect the language, needs, and uses of LGBTQ+ library users? The results of this project will offer further insight into the understanding and needs of LGBTQ+ library users, something that remains lacking even amidst increased interest in this area. Furthermore, the project will yield actionable advice for researchers and librarians seeking to increase access for this group of users.

Project Justification

Despite decades of progress, members of the LGBTQ+ community continue to face challenges and discrimination in many areas of social services in the United States (Medina & Mahowald, 2023). Though U.S. libraries strive to provide information to their diverse constituencies, there remain barriers to use for a number of marginalized communities, including LGBTQ+ individuals. Library catalog data poses one such barrier, and its potential for bias, misrepresentation, and inequity of information access have been well-documented. Library data standards have long been designed to meet the needs of users from the assumed dominant social groups (primarily white, male, heterosexual, and cisgender), describing those in non-dominant groups inaccurately, offensively, or ignoring them altogether (Berman, 1993; Olson, 2002). This results in library catalogs populated by harmful and impenetrable terminology for those outside historically dominant populations. The unique difficulties this creates for members of the LGBTQ+ community have received increased interest in recent years. For example, Watson (2020) found that library subject metadata has been slow to reflect LGBTQ+ identities, even though these topics have long been discussed in published literature. Accordingly, calls to rectify the exclusion of LGBTQ+ perspectives and revise the language used in the library catalog have also intensified in recent years (Adler, 2017; Cataloging Ethics Steering Committee, 2021; Clarke & Schoonmaker, 2018). Common approaches include efforts to update the widely used subject vocabulary Library of Congress Subject Headings (LCSH) (Watson, 2020; Cronquist et al., 2021), or supplement current library data with terms from community-based vocabularies such as the Homosaurus (Cifor & Rawson, 2022). While these approaches hold promise, there will never be complete consensus on controlled vocabulary, particularly for the terminologically diverse LGBTQ+ community (Snow et al., 2023). Furthermore, most current interventions remain expert-driven and may carry unexamined assumptions about the expected usability of the results. To address these gaps, our research group, the ICU (Inclusive Catalog Use) Lab, has been carrying out funded, user-based research related to these topics since 2021. In a recent study, we found personal identity terminology among a sample of 200+ LGBTQ+ library catalog users was complex and highly varied, leading us to conclude that any attempt to codify such terminology for use in library catalogs will be fraught (Snow et al., 2023). Likewise, we learned through interviews with 15 LGBTQ+ catalog users that participants were confounded by libraries' use of the common subject term *Sexual minorities*; many participants noted not only its inaccuracy in describing LGBTQ+ people, but it is also a term they would never think of using to find library resources (Moulaison-Sandy et al., 2023). In addition, currently ongoing work by our lab is poised to reveal more about the unique ways this group of users thinks about genre metadata. As shown by our lab's findings, there exists an important opportunity for greater user involvement in dismantling barriers to access posed by library data. The research project we propose here is our next step in establishing a more comprehensive understanding of LGBTQ+ library users and their needs.

Project Work Plan

This proposed project is led by PI Brian Dobreski (Assistant Professor, University of Tennessee) and co-PIs Heather Moulaison-Sandy (Director of Graduate Studies/Associate Professor, University of Missouri iSchool) and Karen Snow (Doctoral Program Director/Professor, Dominican University), founding members of the ICU Lab. The project will last three years (August 2024-July 2027) and will proceed in three phases. Throughout the entirety of the project, PIs members will be supported by an advisory board representing specific areas of subject and research expertise as well as the interests of potential stakeholders. Confirmed advisory board members include Denice Adkins (University of Missouri), Amber Billey (Homosaurus), Lynn Connaway (OCLC), and cooperating site representative Rachel Fischer (CCS).

Phase one: User Studies with LGBTQ+ Library Users

In the first phase of this project, we build on our previous work examining LGBTQ+ users and library catalog use by performing a series of in-depth user studies. Partnering with public libraries in Illinois through two consortia, Cooperative

Computer Services (CCS), a group already exploring the use of Homosaurus in their catalog (Fischer, 2023), and Reaching Across Illinois Library System (RAILS), we will recruit 50 current and potential adult users of the public library who identify as LGBTQ+. The combined coverage area of these consortia is especially conducive to our study as it encompasses a range of settings, communities, and demographics combined under a single catalog interface. User studies will take place via Zoom for increased accessibility. During the study, users will be led through a talk-aloud procedure in which they perform certain tasks using the CCS shared online library catalog. Researchers will observe further details about catalog use beyond initial searching, including how users sort and filter results, as well as which elements of metadata are made use of. Subjects will receive compensation for their participation. During this phase, regular meetings with advisory board members will be held to assist in the development of the protocol, concurrent activities in the field to avoid redundant work and to offer insight into emerging results.

Phase two: Analysis and metadata enhancement

In the second phase, we draw on the results of the first phase alongside earlier findings from our lab's previous works on LGBTQ+ library users to develop a detailed picture of how users understand and engage with library data in the context of the catalog. Of particular interest will be how these users identify and understand LGBTQ+ related library resources. During this phase, researchers will work with advisory board members to develop both a clear set of user behaviors and needs, as well as a set of metadata recommendations for the library catalog to help address them. Working from this set of recommendations, researchers will identify a sample of records in the CCS shared catalog for enhancement. These enhancements may involve the relabeling or prioritizing of existing data, the inclusion of new data, and may draw on other public sources of information beyond library catalogs. The resulting set of enhanced records will be made openly available.

Phase three: Focus groups with users and librarians

In the third phase, we close the loop by returning to LGBTQ+ library users to gain feedback on the metadata enhancements in the record set generated during the previous phase. In cooperation with CCS and RAILS, researchers will recruit current and potential adult users of the public library system who identify as LGBTQ+ for a set of focus groups. Focus groups will be conducted in person in locations within the consortia coverage areas (i.e., Illinois). Each focus group will contain 5-10 participants, and researchers will host at least 8 such focus groups. During the focus groups, participants will be shown catalog searches and records using both the current CCS metadata as well as with the enhanced record set. Participants will be invited to share their reactions and suggestions on further improving the metadata and library catalog to better serve their needs. Additionally, one or more focus groups will be held with library staff from CCS and RAILS member libraries to incorporate their reactions and suggestions as well. All focus group members will receive compensation for their participation. Based on feedback from this phase, researchers will produce an updated version of the enhanced record set.

Project Results

The overarching goal of this project is to continue the work of the ICU Lab to understand how marginalized users, in this case LGBTQ+ community members, interact with library catalogs. We seek to find user-driven, effective ways to supplement current access to library resources as a way of supporting improved catalog use. When this research is completed, we will better know 1) how LGBTQ+ users search, 2) how catalog metadata could be enhanced to help these users, and 3) actionable advice for libraries interested in implementing these enhancements. Throughout the project, various deliverables will be used to communicate findings and recommendations to stakeholders and interested audiences. These include research articles in relevant journals (Phase 1-3), public presentations to practitioners during an American Library Association Annual Conference or similar event (Phases 1 & 3), open data sets of enhanced records along with documentation (Phases 2 & 3), freely available metadata recommendations for library catalogs (Phase 3), and a short informational video with accompanying documentation on successful search strategies aimed at LGBTQ+ library users and those assisting them (Phase 3). For LGBTQ+ library users, this work and its findings stand to reduce barriers associated with library use and increase equitable access to information. For libraries, this project will offer insight and practical suggestions concerning how to better leverage their vast amounts of data in providing access for the LGBTQ+ community. For researchers, our work will offer a methodological template that can be drawn from in understanding and assisting other marginalized groups.

Budget Summary

We request a total of $392,110 for this three-year project with costs broken down into the following categories: (1) Salaries and Wages $41,431; (2) Fringe Benefits $7,573; (3) Travel $4,364; (4) Supplies, Materials, and Equipment $13,500; (5) Subawards and Contracts $184,577; (6) Student Support $18,954; (7) Other Costs $32,500; and (8) Indirect Costs $89,211.