Metadata Best Practices for Trans and Gender Diverse Resources

Trans Metadata Collective (TMDC)
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1. Background/Intro/Methods

1.1: Introduction

This document is the result of a year of work and collaboration by the Trans Metadata Collective (TMDC; https://transmetadatacollective.org/), a group of dozens of cataloguers, librarians, archivists, scholars, and information professionals with a concerted interest in improving the description and classification of trans and gender diverse people in GLAMS (Galleries, Libraries, Archives, Museums and Special Collections). The Collective's primary goal was to develop a set of best practices for the description, cataloguing, and classification of information resources as well as the creation of metadata about trans and gender diverse people, including authors and other creators. More information about the Collective, its history, and its members may be found in Section 4.

Due to the lack of attention paid to trans and gender diverse issues in GLAMS and among the creators of metadata standards, the TMDC realized the need for this document. Often, metadata is created about us, our communities, and/or our works by people who aren't familiar with trans and gender diverse issues. Commonly used controlled vocabularies and classification systems under- and mis-represent trans and gender diverse people and subjects. Furthermore, trans and gender diverse people can be misnamed or misgendered in metadata. This can out trans and gender diverse individuals and put them at risk of harm or violence.

The structure of this document takes significant inspiration from the Cataloguing Code of Ethics[1] and the Collective's charge follows and echoes that of Archives for Black Lives in Philadelphia (A4BLiP):

> A4BLiP encourages white archivists and non-Black archivists of color who are combatting anti-Black archival description to first take time to familiarize yourself with anti-oppressive terms, concepts, and norms in order to deconstruct the white supremacist values that permeate American society, and by extension, the archival field.[2]

The rest of this document is divided into 4 main sections and several subdivisions. Section 2, General Guidelines & Principles is the most accessible easily-distributable section of this document, offering a top-level overview of TMDC's recommendations. Section 3, Domain-Specific & Technical Details serves as an in-depth explanation of the recommendations found in Section 2, and includes recommendations for Subject Headings and Authorities and Name Authority Records, as well as detailed instructions on the implementation of these recommendations, especially in library settings.

Section 4 offers a list of authors and their backgrounds, reviewers and contributors to this document. The individuals listed in the "Authors" section have elected to appear in it in alphabetic order. There are several individuals who did not wish to be listed due to concerns of outing or personal danger. We would like to extend our thanks for their participation and wisdom. Section 5 Appendices is given over to sources and bibliographies, a list of trans and gender diverse Library of Congress Subject Headings, and a glossary of terms used in this document.

Finally, and most importantly, this document is not meant to be a cure-all or panacea aimed at curing all ills. It does not free its users from other moral, legal, and ethical guidance. Information is meant to be accessible and should be especially accessible to those who the information pertains to. We urge you to center and prioritize the needs of the trans and gender diverse communities and individuals that your institution serves through respectful (and paid) collaboration and consultation.

1.2: Scope & Limitations

This document is designed to serve as a resource for workers in cultural heritage institutions who create metadata about trans and gender diverse people, communities, resources and/or topics. As the Collective is primarily made up of authors working in libraries and archives, significant portions of this document are based in those contexts. However, the authors have made a conscious effort to supplement this document with museum, gallery, and special collections-relevant advice and have invited supplementation of this advice from reviewers of this document.

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[1] Cataloging Ethics Steering Committee. "Cataloging Code of Ethics." Report. Cataloging Ethics Steering Committee, January 2021. https://alair.ala.org/handle/11213/16716.

[2] Antracoli, Alexis, Annalise Berdini, Kelly Bolding, Faith Charlton, Amanda Ferrara, Valencia Johnson, and Katy Rawdon. "Archives for Black Lives: Anti-Racist Descriptions." Philadelphia, USA: Archives for Black Lives in Philadelphia (A4BLiP), October 2019.

In this document we use the term “trans and gender diverse” as an umbrella phrase. We use it to refer to individuals and communities who do not identify with the gender they were assigned at birth. Our usage of the term equally includes gender expressions and schema that fall outside of the binary conceptions of man and woman central to Eurocentric culture.[3] We want to emphasize that people understood in white Eurocentric[4] gender systems as “trans” may (or may not) identify themselves that way and may have alternative cultural conceptions and terminology for their gender. We aim to be respectful of people’s self-identification in our guidelines and recommendations, and a person’s communicated self-identification or preference overrides any recommendation below.

This document assumes that you have some understanding of transness and gender diversity. If you don’t, take some time to educate yourself in this area, including both subtle and overt manifestations of transphobia.[5] Resources and additional sources are available at the bottom of this document.

The term “resources” is used in this document to refer to anything for which metadata is assigned in a GLAMS context. Examples include: books, audiovisual materials, archival collections, artifacts, etc. The best practices in this document apply to resources about:

- transgender people
- non-binary people
- trans and gender diverse people
- trans and gender diverse peoples’ experiences
- gender identity
- gender (if the resource is inclusive of trans and gender diverse identities and experiences in a significant way)

The best practices about naming are also applicable to trans and gender diverse authors and other creators of resources. Not *every* recommendation below can be applied to every person, resource, or community in the above list, and we have attempted to capture applicability and nuances below.

Finally, we realize that not everyone has the authority, power, or funding to implement everything recommended below perfectly. Perfect is not always possible, and sometimes you just have to do your best. Each of the sections below are aimed to provide tools towards justice.

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[3] This convention follows the forthcoming volume by Adolpho, Kalani, Stephen G. Krueger, and Krista Mccracken. *Trans and Gender Diverse Voices in LIS*. Sacramento, CA: Library Juice Press, 2022.

[4] We are using ‘Eurocentric’ deliberately here. As Clair Kronk, a peer reviewer of this document, pointed out: "Western" is a white nationalist fiction that never really existed as a unified "identity"; I think Eurocentric is more specific in this regard, especially since it can easily confuse when people are physically western on the planet, but not "Western" in terms of arbitrary classification (such as in Central and South America).”

[5] Be aware that transphobia is not always blatantly obvious. Red flags: “rapid onset gender dysphoria,” “gender critical,” “gender ideology,” ideas about protecting women & girls (in the context of bathrooms & sports), ideas about biological sex, etc.

2. General Guidelines & Principles

- **Make the process of metadata creation transparent**
    - Make descriptive standards, rationale, and context publicly available.
    - Solicit active collaborations with trans and gender diverse communities in ongoing process changes (and clearly communicate compensation).
    - Communities should ideally be able to say whether they want this type of inclusion first.
    - Provide clear channels for feedback and workflows to assess and implement those suggestions.
    - Implement versioning to track changes in description over time in digital and paper records, including copies of old descriptions for accountability. If changes are being made to a record about a person, follow the guidance below.

- **Use culturally and contextually appropriate labels for trans and gender diverse communities and subjects**
    - Different cultures and languages have terms for genders that may not translate into the primary language of description. Include terms in the original language (original script and transliterated) alongside added translations and descriptions.
    - There are a multiplicity of trans communities. Collaborate with the specific community that is impacted.[6]
    - Prioritize terms used within a community, which may include reclaimed or self-ascribed slurs or otherwise sensitive language, and retain community terms alongside controlled vocabularies or otherwise authoritative terms.
    - Practice respectful and reciprocal collaboration with communities when possible to avoid uncritical application of terms. Follow community protocols as part of this process.[7]
    - Accept that some terms, after consultation, may not be able to be shared publicly.
    - Indicate term changes over time and be clear about if a particular term is from the source, or if a more recent term has been applied in your metadata.

- **Correctly name and identify trans individuals**
    - Trans and gender diverse individuals may use different names in different points or contexts in their life. Rely on self-identification and self-description where possible, including direct consultation with individuals or communities.
    - Understand that additional framing or contextualization may be required with self-ascribed slurs or pathologizing language.
    - It is not necessary and not recommended to record information about someone's gender identity or previous names when resources have nothing to do with gender identity. However, you may want to consider recording this

[6] For example, if you have a collection focusing on non-binary people, collaborating with a group of binary-identified trans people is not sufficient, or if a collection is about trans people from a specific cultural community, it is not going to be appropriate to collaborate only with white trans people.

information if it provides contextual information for trans and gender diverse resources.
    - If changes need to be made, make sure to update all references in public-facing channels and retain previous information at an administrative level if necessary.
    - For information about names in LC/NACO authority records, see section 3.4 Name Authority Records (NACO).

- **Be explicit about transphobia in collections, items, and metadata**
    - Identify both perpetrators and victims, including the usage of active voice and subject headings to “embed responsibility.”
    - Work to proactively identify sensitive language and content, including coded language, rather than relying solely on patron reports.
    - Correct offensive or inaccurate language provided by other metadata creators, unless it falls under the criteria detailed below.
    - For sensitive language that is self-ascribed or directly in the material itself (e.g. title, caption, text), include a contextualizing statement and/or content warning in each place the material is described or may be encountered by users.

- **Identify trans-related content and metadata through regular assessment and prioritize for remediation**
    - Plan proactively for periodic assessment and remediation, including the identification of materials related to trans and gender diverse communities and individuals, especially when they are parts of larger collections where they are not the focus. Collections and materials related to Indigenous cultures globally often exhibit a high degree of gender diversity.
    - Avoid using automation for batch replacement of terms, and instead use it as a tool to aid assessment, alongside qualitative analysis around the rationale and impact of existing description.

3. Domain-Specific & Technical Details

3.1 Subject Headings and Authorities:

3.1.1 Using existing LCSHs

This section serves as an overview of Library of Congress Subject Headings (LCSH) that can be used for trans and gender diverse resources. LCSH is the most widely-used subject heading language in the world, and most commonly used in archival and library contexts. It is often supported by additional subject headings; for example, in Canada, GLAMS often use Canadian Subject Headings alongside LCSH. This section will largely focus on the use of LCSH.

There is a full list of relevant LCSH in Appendix 5.2. Because LCSH is not very inclusive, this section includes our comments about some of the headings and in some cases advises avoiding particular headings. There are also suggestions of combinations of headings that can be used when no appropriate heading exists.

If there is no LCSH for the specific term used in the work, try to include that term elsewhere in the record. This could include:

- Adding a variant title (MARC tag 246) for a subtitle containing the term;
- Including a formatted contents note (MARC tag 505), summary (MARC tag 520) or general note (MARC tag 500) that includes the specific term;
- Adding the term as an uncontrolled index term (MARC tag 653). Uncontrolled index terms are subject terms that do not belong to a controlled subject heading system or thesaurus;
- For DACS compliant finding aids, these terms can be included in the scope and content note (MARC tag 520) or biographical and historical note (MARC tag 545). Abstracts are not encoded in MARC.

For more information about LCSH, including how subject headings are used and assigned, see the Library of Congress' Subject Headings Manual; particularly helpful is H 180 Assigning and Constructing Subject Headings. There are also instruction sheets for various formats and topics.

In this section, words and phrases in bold are authorized LCSHs. A term preceded by "--," is a subdivision.

3.1.2 Identities in LCSH

LCSH acknowledges four broad categories of trans identities (see below), and a small number of narrower ones.[8] However, there are more than four terms that trans and gender diverse people use to refer to themselves. This is one of the major limitations of LCSH, but there are ways to overcome this:

[8] See Section 5.2 for all available headings.

- You may want to consider using an additional controlled vocabulary that covers gender identity terms more comprehensively (see section 3.2.9 Cataloguing with Other Vocabularies).
- If the term used in the work is not available as a subject heading, consider using the heading that is the "best fit", including the concept headings outlined in section 3.2.3. While this is less than ideal, including subject headings will help users find resources about transness and gender diversity.
- You may also want to consider proposing the term as a new heading (see section 3.2.8.1 Proposing a new heading).

The four broad categories of trans identities that LCSH recognizes are:

Transgender people and **Transsexuals**[9]
These are two separate headings, but because they're related we'll consider them together here. Although the term "transgender" is now predominant, some people currently identify as transsexuals. The term "transsexual" was coined earlier than the term "transgender" and was the predominant term until the 1980s. Definitions of "transsexual" and "transgender" will vary across time, place, and person. In very broad strokes, "transsexual" tends to centre the body and/or physical changes (i.e. biological sex), whereas "transgender" tends to centre the broader concept of gender, which includes its social, cultural, and embodied aspects. It is also common for people who identify as transgender to make physical changes, usually through hormones or surgery. The scope notes and sources in the subject authority records for these headings are out-of-date. LC has established **Transgender people** as a broader term of **Transsexuals**, however many trans people consider these to be distinct identities.

LC defines "transsexualism" as "the condition where an individual's gender identity does not match [their] physical sexual characteristics". Transsexualism is no longer considered a condition in the medical sense but could be considered to be the state of being transsexual. Many people who feel that their gender does not align with their physical sex characteristics do not use "transsexualism" to describe this. The equivalent heading for the state of being transgender is **Gender nonconformity** (has a UF reference for Transgenderism).

The scope notes and sources in the subject authority records for these headings are out-of-date. Use the subject heading that matches the term(s) used in the resource. If the resource just uses "trans", consider adding both **Transgender people** and **Transsexuals**, keeping in mind the distinction made above and the needs of your users. Limit the use of **Transsexualism** to resources using that term and consider using **Gender dysphoria** for resources discussing transsexualism as a medical diagnosis. Also consider adding gender-nonconforming headings if the resource uses "trans" as an umbrella term inclusive of those identities.

[9] As of October 2023, the Gender and Sexuality SACO Funnel is working on a project addressing the appropriate use of the term "transsexual" within LCSH.

Gender-nonconforming people
LCSH uses this heading as an umbrella term to cover several experiences of gender. Primarily, this term is used for people who experience and express gender in a way that goes against the norms of the culture in which that person lives. This includes genderqueer, gender-creative, non-binary, and gender-variant people, but is not limited to only these terms or identities. Not all gender-nonconforming people are transgender, and not all transgender people express or experience gender in a nonconforming way. Further, while a person may experience gender in a way that one culture may deem as nonconforming, their gender expression may not be nonconforming within the context of their own culture. Special care should be taken when applying this term for works about people from non-Eurocentric cultures.

Two-spirit[10] people
LCSH uses this term for "North American [Indigenous peoples], especially men [sic], who assume the dress, role, and status of the opposite sex [sic]."[11] This is an inaccurate interpretation of the term based in colonialism and enforcement of a gender binary. However, the term itself is acceptable. "Two-Spirit" is sometimes used in Indigenous North American communities to refer to sexual and/or gender identity and may also express a spiritual aspect to this identity.[12] "The term, Two-Spirit, was introduced at the third annual international LGBT Native American gathering in 1990. Elder Myra Laramee shared the name and it was quickly adopted as a spirit-name. Today, Indigenous LGBTQQIA+ and Two-Spirit are terms chosen by some Indigenous people to describe an aspect of their identity."[13]

Cataloguers should use this heading ***only*** when North American Indigenous people self-identify as Two-Spirit. Queer, trans, and gender diverse Indigenous people may identify in other ways. For example, many Indigenous communities have their own terms for specific genders; one should not apply Two-Spirit as a catch-all term.

These terms are also used in headings for more specific identities (e.g. **Transgender prisoners**; **Gender-nonconforming children**; **Older transsexuals**)

3.1.3 Concepts in LCSH
LCSH identifies three broad concepts relating to gender diversity. These concept headings can also be used when a heading for a specific identity does not exist.

These are:

Gender identity

[10] Two-spirit with a lower case S is used here as it follows LCSH. The correct formatting is Two-Spirit in all other contexts.
[11] https://id.loc.gov/authorities/subjects/sh95004103.html
[12] https://apihtawikosisan.com/2012/03/language-culture-and-two-spirit-identity/
[13] https://twospiritmanitoba.ca/about-us

This term refers to a sense of one's own gender. While it's most often used when referring to trans and gender diverse people, cisgender people also have a gender identity.

Gender nonconformity
LC uses this heading to cover "the various manifestations of cross-gender orientation, such as cross-dressing, transsexualism, male or female impersonation, intersexuality, etc., treated collectively."[14] Remember that different cultures have different ideas about gender and gender roles, so what looks like nonconformity to the Eurocentric gender binary may actually be conformity with the gender schema of another culture. If in doubt, use **Gender expression** or **Gender identity**.

Gender expression
This term refers to behaviour, appearance, and other ways of communicating one's gender. Examples of gender expression include clothing and pronoun usage. While it's most often used when referring to trans and gender diverse people, cisgender people also use gender expression.

There are also headings about gender identity and gender nonconformity in specific areas. For example, **Gender identity in sports**. See Appendix 5.2 Trans LCSHs for a full list.

3.1.3.1 Lived Experience

There are some LCSHs that address unique aspects of trans and gender diverse people's lives. These are:

Gender euphoria
Gender dysphoria
Gender transition
Gender transition--Hormone therapy
Gender reassignment surgery
Gender-neutral toilet facilities
Social work with gender-nonconforming youth
Social work with transgender people
Social work with transgender youth
Top surgery (Gender reassignment surgery)
Voice, Change of

3.1.3.2 Arts, Culture & Media

LCSH constructs headings for people and concepts in the arts, culture and media in a fairly standard way and has established some of these headings related to trans concepts and identities. There's a full list in Appendix 5.2 (Trans LCSHs).

[class of persons] in [area of arts/culture/media] for example:
Transgender people in motion pictures

[concept] in [area of arts/culture/media] for example:

[14]https://id.loc.gov/authorities/subjects/sh2007003716.html

Gender identity in advertising

[class of persons'] writings, [nationality] for example:
Gender-nonconforming people's writings, American

3.1.3.3 Religion

Some headings exist for **Gender identity** and **Gender nonconformity** in specific religions. These are established by the subdivision **--Religious aspects** further subdivided by the name of the religion. For example,

Gender identity--Religious aspects--Buddhism

There are also headings for Christian and Jewish transgender people and transsexuals but no headings currently exist for trans people of other religions.

Other headings related to religion include:

Bible--Transgender interpretations
Church work with transgender people
Gender identity in the Bible
Gender identity in the Qur'an
Gender transition (Jewish law)

3.1.3.4 Law

Trans and gender diverse people interact with the law and legal systems in a few ways: laws regulate aspects of our lives such as name changes. In some jurisdictions laws protect us from discrimination while in other places, they actively discriminate against us. The established trans and gender diverse legal headings are:

Gender identity--Law and legislation
Gender transition (Jewish law)
Gender transition--Law and legislation
Legal assistance to transgender people
Gender expression--Law and legislation
Names, Personal--Law and legislation
Restrooms--Law and legislation
Transgender people--Employment--Law and legislation
Transphobia--Law and legislation

--Law and legislation is free-floating only under headings of certain types (e.g. animals)[15]. You can also propose new headings with this subdivision if they're needed for cataloguing (see Proposing a New Subject Heading). These would also take the form **[Topic]--Law and legislation**.

[15]"Legal materials: Law and Legislation and Other Subdivisions" *Subject Headings Manual* (H1705) https://www.loc.gov/aba/publications/FreeSHM/H1705.pdf

The subdivision **--Legal status, laws, etc.** can be used with any classes of persons heading. For example, **Two-spirit people--Legal status, laws, etc.**

Consider also adding a heading for the area of law being discussed. Laws regulating the lives of trans and gender-diverse people are not usually solely about gender identity but deal with areas such as clothing, bathroom access, name changes, sports, and schools.

3.1.3.5 Transphobia

Use these heading for works discussing transphobia and discrimination against trans and gender-diverse people. For resources that are transphobic, see the recommendation "Be explicit about transphobia in collections, items, and metadata." in section 2.

Transphobia (includes discrimination)

Also the following subdivisions under classes of persons
--Abuse of
--Crimes against
--Violence against
--Social conditions (use in addition to **Transphobia** under narrower groups for transphobia/discrimination against a particular group, e.g. for a work on transphobia directed at children add **Transgender children--Social conditions**)

Transphobia in medical care
Transphobia in schools
Transphobia in the military
Trans-exclusionary radical feminism

3.1.4 Topics Requiring Special Attention in LCSH

There are some LCSH terms that require extra consideration before using them. These headings may use harmful terminology or exclude groups of people. This section explains the major issues with these headings and suggests alternatives. There may be situations where some of these are appropriate; use the contextual information here along with your cataloguer's judgment and knowledge of your particular institution's needs and policies.

3.1.4.1 The "T" in LGBT+

Sexual minorities is the LCSH for LGBT (or a similar acronym). This is unsatisfactory because it's not a commonly used phrase and because it conflates sexuality and gender, essentially erasing trans and gender-diverse people. Not every work that uses LGBT includes gender diversity.[16] If a resource using "LGBT" covers trans and/or gender-diverse topics, add the relevant identity and/or concept headings (see above). Be flexible with the 20% rule (i.e. only assigning headings for topics that comprise at least 20% of the work)[17] - if

[16] Be aware that some things that seem like LGB issues, may still impact trans or gender diverse people. For example, equal marriage legislation (a straight couple may be barred from marrying because the couple may have matching gender markers on official documents).
[17] "Assigning and constructing subject headings", Subject Headings Manual, H180 https://www.loc.gov/aba/publications/FreeSHM/H0180.pdf

there's less than 20% of an LGBT work covering trans topics, consider adding trans headings anyway to make the information accessible. As of July 2023, LC is considering changing this heading.

3.1.4.2 Coming out and disclosure

Like queer people, trans and gender-diverse people come out and are outed. Unfortunately, LCSH has chosen the headings **Coming out (Sexual orientation)** and **Outing (Sexual orientation)**. There is a distinction between coming out (telling people one's true gender) and disclosing (telling people one's trans status). To describe the latter concept, use the headings **Self-disclosure** and **Gender identity**.

While the qualifier is inaccurate, having the terms "coming out" and "outing" indexed as subject headings will be helpful to users. Consider adding headings to address the trans aspects as well as adding a note indicating that the work discusses coming out/outing in the context of gender identity.

Consider **Gender transition** and/or **Gender expression**
Consider also: **--Family relationships, --Psychology, --Professional relationships** under classes of persons headings.

3.1.4.3 Passing

In a trans context, "passing" is used to describe a person's ability to be perceived as their correct gender. It can also be used to describe a situation where a trans person is perceived to be cisgender. This can be by the trans person's choice or by others' perception. It is most commonly used to refer to trans people whose gender expression aligns with the dominant ideas about gender. There is criticism of this term because it implies that trans people are being deceitful when they express their authentic gender.[18] It also implies that not being visibly trans is something that a trans person must do correctly[19] - if you don't pass, you've failed.
While the heading **Passing (Identity)** exists, the meaning provided in the scope note does not apply in the context of trans and gender diverse people since it talks about individuals presenting themselves as something they're not through concealing aspects of their identity.[20] However, until a heading for passing in the context of gender identity is established, we recommend using the existing heading for resources that use the term "passing" in an explicit and significant way. For resources that more generally discuss how individuals choose to present their gender to others or how gender is socially perceived, use **Gender expression**

3.1.5 LCSH to Avoid

Generally avoid the heading below:

[18]https://www.glaad.org/reference/transgender
[19]Bergman (2009) in Trans bodies, trans selves (2014), 136.
[20] https://id.loc.gov/authorities/subjects/sh95008487.html

Sex

LC uses this to include sexuality, sexual behaviour, and gender. In addition to the heading **Sex**, the word "sex" is used in most headings where the word "gender" should be used (e.g. **Sex role**)[21] This usage conflates physical sex characteristics with gender identity which is inaccurate, invalidating and potentially harmful (most transphobia is based on the idea that physical sex characteristics determine one's gender).

Consider using headings such as **Gender expression** or **Gender identity** or **Sex (Biology)** (for resources about physical sex characteristics etc.)

Headings using the word "sex" are difficult to avoid and there are such a variety, that it's difficult to make general recommendations for alternatives. Strategies can include using broader terms, using two headings to bring out both aspects of a more complex heading, and using subdivisions such as **--Psychology** and **--Social conditions** under classes of persons and **--Psychological aspects** and **--Social aspects** otherwise. As of July 2023, LC is considering changing the terminology in LCSH from "sex" to "gender" where appropriate

3.1.6 Gaps in LCSH and suggested alternatives

These are suggested rather than prescribed alternatives. Not all of the following subject headings will map perfectly to every situation. Cataloguer's judgment should be used before applying them, and cataloguers should take care to familiarize themselves with trans and gender diverse terminology just as we take care to familiarize ourselves with any subject or topic that we are assigning for, with the added conscientiousness needed for subjects in which real people are involved. Resources are available at the bottom of this document if you need to familiarize yourself with trans and gender diverse terminology.

3.1.6.1 Topics Currently without Authorized Subject Headings

<u>For gender markers/name changes, consider:</u>

Recording and registration

Names, Personal

For changes involving government-issued ID include headings for types of documents that would be changed: e.g. **Birth certificates, Identification cards, Drivers' licenses, Passports** as well as **Gender identity--Law and legislation**

<u>For pronouns, consider:</u>

The subdivision **--Pronoun--Social aspects** under the headings for individual languages (e.g. **English language**)

Subdivision **--Language** under classes of persons

[21]Exceptions include: **Gender mainstreaming**, **Gender-blindness**, and **Gender in conflict management**.

3.1.7 Changing LCSH

3.1.7.1 Proposing a new subject heading

Most LCSH are created by LC or members of SACO (the Subject Authority Cooperative Program). Proposals for new subject headings are reviewed monthly. Lists of proposed headings can be found at https://classweb.org/tentative-subjects/ and comments about them can be sent to listcomments@loc.gov.

SACO Funnels are groups within SACO that contribute subject headings with a particular focus.[22] The Gender and Sexuality SACO Funnel Project creates proposals for new LC authority records and revisions to existing authority records "used in the cataloging of resources about, for, and by transgender, gender diverse, intersex, asexual, and other queer, non-heteronormative or non-heterosexual people". In addition to Library of Congress Subject Headings, the group also makes proposals for other Library of Congress controlled vocabularies such as the Library of Congress Demographic Group Terms. If you have an idea for a new subject heading or a revision to an existing one, it's best to get in touch with the Gender and Sexuality Funnel.
https://www.loc.gov/aba/pcc/saco/gender-sexuality-funnel.html

However, it is possible for people outside of LC and SACO to propose new topical LCSHs. Linked below is a Google Doc outlining the steps involved in proposing a new LCSH.

If you are interested in proposing a topic, you'll need to have a literary warrant (i.e. a book or other resource about that topic). A good place to start is with headings that follow an established pattern such as those in the Arts, Culture & Media or Religion sections of this document or sub-groups of trans or gender diverse people. Other areas requiring attention include terms other than **Gender non-conforming people** for non-binary identities and terms in the "Topics without headings" section of this document.[23]

For further information on how to propose new topical LCSH, please see the document linked here: How to Propose a New Topical LCSH (https://bit.ly/NewLCSH).

3.1.7.2 Improving existing subject headings

Ideally, existing headings in LCSH will be updated to more accurately reflect the trans experience. Though changing headings can be more difficult than getting new ones approved, the Library of Congress is open to changing existing headings when a clear case can be made showing that terminology has changed (especially when it's reflected in reference sources). As with proposals for new headings, change proposals are generally submitted by SACO libraries or funnels.

Some examples of headings needing updating:

- Updating the heading **Sexual minorities** to more up-to-date terminology, such as LGBTQ people[24]

[22] https://www.loc.gov/aba/pcc/saco/funnels.html
[23] As of July 2023, the SACO Gender & Sexuality Funnel is working on this.
[24] ibid.

- Updating the qualifiers in **Coming out (Sexual orientation)** and **Outing (Sexual orientation)** to be inclusive of the trans experience[25]
- Changing terminology from “sex” to “gender” when appropriate[26]

Violet B. Fox’s Cataloging Lab is a collaborative resource designed to promote cooperation in proposing revisions and additions to the Library of Congress Subject Headings. Non-cataloguers interested in bringing about changes to headings can work with cataloguers on the research required for successful proposal submission. Headings can be suggested via https://catalogінglab.org/suggest-a-heading/

3.1.7.3 Contacting LC

You can also email the Library of Congress with comments about LCSH at policy@loc.gov. If you have documentation, it’s helpful to attach or include it in the email.

3.1.8 Cataloguing with Other Vocabularies

Because LCSH uses literary warrant as a basis for the establishment of subject headings, there have historically been bodies of knowledge excluded from LCSH because they didn’t exist in monographs and other “scholarly” bodies of literature. While the 1980s saw up to 30 LGBT thesauri created in libraries, those thesauri were unique to the collections of the institutions that created them and saw little use outside of those particular collections. Today, there are several LGBTQ-specific vocabularies that are available for wider use in cataloguing, and a few are detailed below. The PCC now recommends that other vocabularies be used to supplement LCSH to reduce reliance on a single controlled vocabulary that is subject to political pressure from the U.S. Congress.[27] This section includes thesauri that provide more current, specific descriptive terms for trans and gender diverse people and topics, as well as historical terms that can be used as context allows. This section also includes additional resources for using both LCSH and other vocabularies to bibliographically describe trans and gender diverse people and topics.

This document largely focuses on English-language resources, but there are a number of non-English vocabularies. For example, see Catalonian Department of Culture’s TERMCAT - Vocabulari Terminològic LGBT (Lèsbic, Gai, Bisexual i Transgènere.

Gender, Sex, and Sexual Orientation

The Gender, Sex, and Sexual Orientation (GSSO) ontology includes a vast amount of information related to gender identity, gender expression, romantic identity, sexual identity, sexual orientation, sexual behaviour, sexual abuse, and various related topics. Its primary function as a vocabulary is to describe LGBTQ+ people and LGBTQ+ related health topics in biomedical and health science. Cataloguers, archivists and other metadata professionals

[25] ibid.
[26] ibid.
[27] https://listserv.loc.gov/cgi-bin/wa?A2=PCCLIST;3dea297e.2206

using MeSH and struggling with that vocabulary's limitations in the description of LGBTQ+ topics might consider complementing those terms with those from GSSO.

GSSO GitHub: https://github.com/Superraptor/GSSO
GSSO Website: https://www.ontobee.org/ontology/GSSO

Homosaurus
Homosaurus is a linked data controlled vocabulary of LGBTQ+ terms that has been authorized for use in MARC records since 2019. It is a vocabulary meant to supplement more general vocabularies such as LCSH when doing subject assignment. Homosaurus terms can be used for resources about LGBTQ+ subjects that are more specific than LCSH can account for, or for subjects that LCSH does not otherwise have an appropriate heading for. Homosaurus includes historical terms that are meant to be used only in an historical context or when the person being described uses that term themselves.

Homosaurus: https://homosaurus.org/

Colbert's Bibliography of GLBT Controlled Vocabularies and Classification Schemes
Jay Colbert's bibliography "relies on Dee Michel's inventory (prepared for the Round Table in 1990) as well as [Colbert's] own research and the research of Matt Johnson." For unpublished titles, Colbert gives the information which Johnson provides about where a copy may be obtained. For secondary literature, abstracts are provided where available.

Please be aware that this document is credited to the author's former name. Per the author, the correct citation is:

Colbert, J.L. [ORCID: 0000-0001-5733-5168]. "GLBT Controlled Vocabularies and Classification Schemes." ALA, August 2017.
https://www.ala.org/rt/sites/ala.org.rt/files/content/Accessibility/GLBT%20Controlled%20Vocabularies%20and%20Classification%20Schemes.pdf

Ganin's QueerLCSH
Netanel Ganin's QueerLCSH is a comprehensive list of LCSH, LCDGT, and LCGFT for LGBTQ+ topics. As of 2022-12-01, Ganin's QueerLCSH is no longer being updated.

QueerLCSH: http://www.netanelganin.com/projects/QueerLCSH/QueerLCSH.html

LGBTQ+ Life (EBSCO)
LGBTQ+ Life provides indexing and abstracts for current LGBTQ+ focused scholarly literature, as well as for historical primary sources. This is not an Open Access resource.

LGBTQ+ Life's About section: https://www.ebsco.com/products/research-databases/lgbtq-life

TransLCSH.com
A list of Library of Congress Subject Headings (LCSH) that can be used for trans and gender diverse resources. Initially created as an appendix to this document. It does not include headings established with free-floating or geographic subdivisions, but It is useful to consider

these headings alongside the recommendations for their usage in the best practices document (especially section 3.1, Subject Headings & Authorities).

TransLCSH: https://translcsh.com

3.1.9 Additional Subject Headings & Authorities References

For additional resources from the Subject Headings & Authorities Working Group see:

- 5.1. Glossary of Terms in this Document
- 5.3.1 Annotated Bibliography, Subject Headings and Authorities
- 5.2 Trans LCSHs

3.2 Name Authority Records (NACO)

3.2.1 Scope

This document discusses issues related to name changes and recording gender in name authority records (NARs) created as part of the Name Authority Cooperative Program (NACO). If your institution uses a different system or policy please use ones relevant there.

3.2.2 People who Can Change NARs

The following people are able to make transition/gender related changes to someone's NAR. If you would like to be added to the below list, please contact brimwats@mail.ubc.ca or bschaefer@osgoode.yorku.ca.

Beck Schaefer
bschaefer@osgoode.yorku.ca
Cataloguing Assistant
Osgoode Hall Law School Library, York University (Toronto, Canada)

Michelle Cronquist
cronquim@email.unc.edu
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Rachel Newlin
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Cataloging Librarian
Schaumburg Township District Library

Deb DeGeorge
debdegeorge@gmail.com
Rare Books Cataloger
Washington D.C.

Laura Daniels
lew235@cornell.edu
Assistant Director, Metadata Production
Cornell University Library

NACO Funnels[28] and Cataloging Lab[29] are other avenues to create and update NARs.

3.2.3 Recording Gender

As per the PCC Ad Hoc Task Group on Recording Gender in Personal Name Authority Records revised report (April 7, 2022): "Do not record the RDA gender element (MARC 375) in personal name authority records. Delete existing 375 fields when editing a record for any other reason."[30] A subsequent task group, called the PCC Task Group on Gender, was formed in August 2022 and is working on implementation of the earlier group's recommendations as well as considering issues related to gender in other areas of authority and bibliographic records.[31]

The following instructions apply to recording gender in NARs outside of the 375 and apply regardless of the person's gender identity.

- Don't record information about gender in name authority records.[32]
- If you must: question why you think it's necessary. Gender information is not particularly useful or relevant. Sharing gender information can be a violation of privacy and can out trans and gender diverse people, potentially putting them in danger. Additionally, the gender information you record may be inaccurate now or in the future. For a fuller explanation, see the annotated bibliography (Thompson, 2016; Billey & Drabinski, 2019; Billey, 2019).
- If you still must:
    - Provide a direct quotation from the person explicitly identifying their gender in a 670 (source data found). An explicit statement would be something like "I am _____" or "I identify as _____". Pronouns, information about a transition, etc. are not explicit identifications of gender. If an explicit statement of gender is not widely publicly available, do not contact the author to ask them what their gender is.
    - Get the individual's informed consent to include their gender information in their NAR. Let them know the reason that you want to include this information, how it will be used, and how public it will be. While non-public note fields shouldn't display in library catalogues they do display in sources such as id.loc.gov. Make a note in the NAR that you have the person's permission to record their gender.

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[28] https://www.loc.gov/aba/pcc/naco/nacofunnel.html
[29] https://cataloginglab.org/kbtopic/names-naco/
[30] https://www.loc.gov/aba/pcc/documents/gender-in-NARs-revised-report.pdf
[31] https://loc.gov/aba/pcc/taskgroup/TG-on-Gender-charge.pdf
[32] See 2022 PCC Report on Recording Gender in Personal NARs https://www.loc.gov/aba/pcc/documents/gender-in-NARs-revised-report.pdf

3.2.4 Recording former names

3.2.4.1 The Author's Wishes

Respect the wishes of the author regarding the use of their former name(s) in NARs. A request from an author to change their NAR is sufficient.[33] Reach out to the author where possible if you are aware that they have changed their name. The PCC Standing Committee on Training has a couple of FAQs about contacting creators and contributors:

Authority Control FAQs for Cataloguers Contacting Creators and Contributors
Authority Control FAQs for Authors and Creators

While the FAQs don't specifically address trans-related issues in NARs, the recommendations do prioritize the privacy of authors and other creators. Communication with authors should be about name changes and other information relevant to a NAR (i.e. birthdates, middle initials, etc.) Do not ask about or mention someone's gender/gender identity when reaching out to them. If you know or suspect someone is trans, avoid using their former name in your communications with them. In most cases, you can use a phrase like "previous name" or refer to the resources they've created. It is important to let authors and other creators know that we cannot guarantee that former name(s) in an authority record will be hidden, but we will try.

If you do not know the author's wishes, follow these principles:

- Someone's full body of work should be accessible using their current name.[34]
- Former names that they have previously published under should be used as little as possible and kept private.
- Former names that the author has not published under should not be included.

Be sure to include relevant information from your communication with authors in the 670. This will include the author's wishes around name usage (e.g. "author requests that former name not display in public catalogue"). Consider making a 667 for specific instructions from authors (e.g. "Do not add a 400 for former name as per author's request. Former name was used on publications until 1984." or "Author requested former name be kept in the authority record, do not remove".)

3.2.4.2 Technical details (MARC & RDA)

While variant access points (such as former names) are not core elements under RDA, they are considered a best practice under NACO.[35] The variant access point is currently the mechanism that connects a person's works together when they publish under more than one name.

MARC does have coding which will suppress the display of a variant access point in OPACs and discovery layers. The control subfield ($w) of the see from tracing fields (4XX) consists of "Up to four character positions (designated as $w/0, etc.) that indicate whether special

[33] NACO participants manual, p. 93.
[34] https://publicationethics.org/news/vision-more-trans-inclusive-publishing-world
[35] NACO participants manual, p. 60.

instructions apply to the display of the heading in the 4XX or 5XX field and whether a tracing is restricted to the reference structure of a particular type of authority."[36] The fourth character position (/3) is for reference display and the use of "a" in that position indicates that the reference is not displayed.

For example:

100 1\ $a Name, Current
400 1\ $w nnea $a Name, Former

"nne" in a 4XX indicates that the heading is an earlier established form of the heading, this could be because it was formulated under AACR2 or because the person's name has changed.

the addition of an "a" indicates that this reference should not display in OPACs and discovery layers

"nnea" is currently used for AACR2 forms of name that are no longer valid access points under RDA and for former authorized access points with open dates when the date in the authorized access point has been closed. This coding should also be used when a person's former name is included in a 400 field. It is important to note that this coding will not prevent a former name from displaying on sites such as id.loc.gov, authorities.loc.gov and viaf.org. It is not appropriate to use "nnea" as a way to keep a person's former name completely private. However, when a former name is used in an authority record, "nnea" should be used to reduce the amount that the former name displays.

3.2.4.3 OCLC Technical Details

The TMDC currently does not have best recommendations or practices for NARs in OCLC and invites any contributions towards the development of these resources.

3.2.5 Other information in NARs

In addition to the name and gender fields, information about someone's gender identity and history may be found in other places in the authority record. This information should be avoided, as it has the potential to out someone, and can include:

- An associated group that is trans. Be aware that not all trans groups have trans in the name, so it is best to determine what a group is before recording it in a NAR.
- A field of activity, group, or occupation that is limited to one gender that the author was involved in prior to transitioning.
    - E.g. recording Nuns as an occupation in the record for a man who was a nun prior to transitioning
- Name qualifiers.
    - In some cases it is necessary to qualify a name to create a unique heading. In lieu of birth/death dates and fuller forms of name, a name may be qualified by

[36] https://www.loc.gov/marc/authority/adtracing.html

other characteristics such as occupation. Avoid using anything in the qualifier that could out someone.
        - E.g there are a handful of NARs that use the qualifier “Writer of transgender fiction.” However, “Writer of [Title]” is also an acceptable qualifier and should be used instead.
    - Information in the Source data found field (670).

If you feel that potentially outing information is necessary to distinguish two people with similar names, consider recording it in a 667 rather than a 37X.

N.B. For writers of books that reference transness or gender diversity in the title, there will be reference to transness in the NAR (source citation, 670 $a). Keep in mind that this information pertains to what the person has written about, *not* who they are. It is also public information (the person has published this book and it can be assumed that they are okay with being identified as the author of it). If you routinely add 372s (field of activity) to NARs, it is reasonable to add a 372 indicating that transness or gender diversity is someone’s field of activity.

However, avoid applying terms for personal identities (e.g. transgender people). Instead, employ terms for concepts (e.g. gender identity). Since controlled vocabularies are recommended for the 372, see the subject headings section of this document for more details on trans terminology in controlled vocabularies. It is also likely that gender diversity is not someone’s sole field of activity–they are likely writing about transness from a specific disciplinary perspective (e.g. sociology) or in a specific context (e.g. in films). If you are adding a 372 for transness, add one for this other field as well.

3.2.6 Changed NARs & former names in bib records

Avoid juxtaposition between current and previous names in a public display as this will usually out someone as being trans.[37] Library users encounter authors’ names in the catalogue and on the work itself. Within a catalogue record, the name can be found in the NAR and in various descriptive fields, primarily the statement of responsibility. Differences between the NAR and the rest of the bib record will be most jarring because the different forms of name will be visible on the same screen. These differences will also be seen more frequently because they are online and accessible to a wider audience; this is especially true with shared records and linked data. Because a book is only intellectually linked to its bib record (i.e. both contain pieces of data that a user can match in order to locate the book), the discrepancy is both less jarring and will be seen less frequently.
How?

- Use the same form of name throughout the bib record (the most likely scenario is to replace any former names with the current name in brackets)
    - RDA justification (see below) for use of brackets around current name
- Prioritize purchase of new editions etc. with current names
- Change the name on the book

[37] https://publicationethics.org/news/vision-more-trans-inclusive-publishing-world

3.2.6.1 Technical details (RDA)

From RDA 2.2.4 Other Sources of Information:
“If information required to identify the manifestation does not appear on a source forming part of the manifestation itself (see 2.2.2.1 RDA), take it from one of the following sources … When instructions specify transcription, indicate that the information is supplied from a source outside the manifestation itself by means of a note (see 2.17 RDA) or by some other means (e.g., through coding or the use of square brackets). Indicate that information is supplied for any of the following transcribed elements: … Statement of responsibility relating to title proper, Parallel statement of responsibility relating to title proper”

Application of this rule depends on the interpretation of the phrase "required to identify." Is the current name of the author required to select and access the work? Is/are the former name(s) required? There is an allowance to choose a statement of responsibility from a source outside the item being catalogued as a last resort if "required to identify," then adding a note indicating the source of information for the statement of responsibility.

If the cataloguer judges that having someone's chosen name in the statement of responsibility is "required to identify" and/or a former name is not required and there is a statement of responsibility for that work in another source (i.e. chosen name linked to work), then the cataloguer could replace the entire statement of responsibility in the record. This means the name in the record would be different from the name on the work; however, this is unlikely to prevent library users from being able to find a physical book. Ctaloguers should utilize or develop methods and policy appropriate to their institution for this process (staff notes, notes in catalogue records, etc.). Include other departments or staff necessary to implement these methods and policies.

3.2.6.2 OCLC Technical Details

The TMDC currently does not have best recommendations or practices for changed NARs in OCLC and invites any contributions towards the development of these resources.

3.2.7 Context

PCC Ad Hoc Task Group on Gender in Name Authority Records
Revised Report on Recording Gender in Personal Name Authority Records (2022)
https://www.loc.gov/aba/pcc/documents/gender-in-NARs-revised-report.pdf

Report of the PCC Ad Hoc Task Group on Gender in Name Authority Records (2016)
https://www.loc.gov/aba/pcc/documents/Gender_375%20field_RecommendationReport.pdf

NACO is a program of the Program for Cooperative Cataloging (PCC). In 2016 an ad hoc task group released a report with recommendations for recording gender in NARs. The report was revised in 2022 and now says: “Do not record the RDA gender element (MARC 375) in personal name authority records. Delete existing 375 fields when editing a record for

any other reason."[38] The PCC is currently reviewing other issues related to gender and previous names in name authority records.

NACO Participants Manual, page 46
https://www.loc.gov/aba/pcc/naco/documents/NACOParticipantsManual.pdf
In addition to following the PCC's recommendation to not record gender in MARC field 375, the manual states that "gender information may optionally be recorded in the 670 field(s) of NACO records, based on cataloguer's judgment and only if the information is explicitly presented in the source of information."[39] See section 3.4.3 of this document for our recommendations about recording gender in other areas of a NAR.

3.3 Classification - General Principles

As of August of 2023, this is a new section and only offers brief recommendations and general principles for classifying resources using the Library of Congress Classification (LCC) or Dewey Decimal Classification (DDC).

The aim of the recommendations is to integrate trans resources into the library's full collection rather than creating a distinct "trans" area at the general call number. The rationale for this approach:

- It acknowledges that trans and gender-diverse people are more than just our gender/gender identity and that we lead multi-faceted lives.
- It brings transness and gender diversity in specific areas to the attention of people who may not seek them out.
- It may protect trans resources outside the general classification number from censorship challenges.

Use general trans classification numbers only for general/comprehensive works or biographies focusing on trans aspect of a person's life. Avoid using these numbers for transphobic resources. In LCC, the range HQ77.7-HQ77.965 covers transness. In DDC, the classification number is 306.76.

For a specific aspect of transness, class with that aspect. Prefer a classification number for how the subject relates to transness or LGBTQ people ("sexual minorities").

For example:

LCC: Z711.92.T73 (library services to trans people)

DDC: 331.5 (trans workers)

If such a classification number doesn't exist, use a number related to the non-trans aspect of the subject.

For example:

LCC: MT1 (classification for music education) for the book *Honoring Trans and Gender Expansive Students in Music Education*

[38] https://www.loc.gov/aba/pcc/documents/gender-in-NARs-revised-report.pdf
[39] https://www.loc.gov/aba/pcc/naco/documents/NACOParticipantsManual.pdf, p. 46

DDC: 302.231 (classification for digital media) for the book *The Two Revolutions : a History of the Transgender Internet*

In DDC standard subdivisions represent another problem. For example:

-081 people by gender or sex
-0811 men
-082 women
-083-084 age groups
-085 relatives
-086 miscellaneous social attributes (socio-economic status, marital status, sexual orientation, etc.)
-087 disability, illness and gifted people
-088 occupation & religion
-089 ethnic and national groups

In DDC, the standard subdivision -08 can be used to show that a resource relates the subject to a particular group of people. The standard subdivision for people by gender or sex (-081) includes “gender identity” while the one for people by miscellaneous social attributes (-086) includes “transgender and intersex people” as well as people by sexual orientation. -081 is preferable, however -086 will keep everything relating the subject to LGBT people as a broad group closer together which may better serve library users. Use cataloguer’s judgment, taking into account your local context as well as the nature of the resource. For resources about trans women prefer -082 (women) and for those about trans men, prefer -0811 (men).

4. Authors, Reviewers, and Other Contributors

The initial planning for what would become the Trans Metadata Collective was undertaken by K.J. Rawson, Bri(an) M. Watson, Beck Schaefer, Laura Horak, Magnus Berg, Clair Kronk, Djaz Zulida in 2021. Recognizing the limitations of their perspectives, this planning group launched a broad call for participation on Twitter, GLAMS-relevant listservs, and elsewhere. The response to this call was overwhelming, and over a hundred GLAMS (Galleries, Libraries, Archives, Museums, and Special Collections) professionals expressed interest in participation.

A couple of large-scale meetings were held to discuss action plans, and this larger group broke out into several working groups in order to allow individuals to play to their own expertise. The initial working groups were called Descriptive Practices, Subject Headings & Authorities, Name Authorities & Access, and the Ethical Recommendations Working Group. A Slack workspace was created, and the working groups began meetings to develop individual documents. These documents took a variety of forms, including lists, bibliographies, formal reports and others. On a semi-monthly basis a representative from each working group met in a so-called Coordinating Committee. One by one as working groups “finished” their self-assigned work or goals they were “rolled up” into the Coordinating Committee and this final document took shape. During this year-long process, individuals participated as they were able to—several people were involved in the initial work, and several others were not involved until the final stages.

The individuals listed in the “Authors” section have elected to appear in it in alphabetic order. The ordering of those in the “Reviewers” section are listed unordered. There are several individuals who did not wish to be listed in both sections due to concerns of outing or personal danger. We would like to extend our thanks for their participation and wisdom.

4.1 Authors

- **Jasmine Burns** - metadata librarian at Cornell University. White, nonbinary, queer person residing on unceded territory of the Cayuga Nation.
- **Michelle Cronquist** - special collections cataloger at the University of North Carolina at Chapel Hill.
- **Jackson Huang** - digital collections librarian at the University of Michigan, gender variant Han Chinese settler living on Nisenan territory and working remotely through the historical and ongoing labor of Black Americans and racialized people globally.
- **Devon Murphy** - artist & metadata analyst at the University of Texas at Austin, a white/nonbinary/chronically ill settler based in the American South (currently Tonkawa, Wichita, Coahuiltecan, Comanche land.) My knowledge and understandings come from this positionality as well as from my mentors in Texas and at the University of North Carolina at Chapel Hill.
- **K.J. Rawson**– associate professor at Northeastern University, director of the Digital Transgender Archive, and co-chair of the Homosaurus. I am a queer trans guy who is a white settler living on the traditional land of the Nipmuc people.

- **Beck Schaefer -** cataloguing assistant at Osgoode Hall Law School Library (York University, Toronto, Canada). I am trans and a white settler on the traditional territory of Haudenosaunee, Huron-Wendat, and Mississaugas of the Credit First Nation.
- **Jay Simons** - MA graduate from Carleton University in Public History and current museum worker. They are a queer and non-binary white settler living in unceded and unsurrendered Algonquin Anishinaabeg territory.
- **B. M. Watson** - PhD. student at the University of British Columbia iSchool. Editorial board member of the Homosaurus, Archivist and Historian for the Haslam Polyamory Collection. White, queer, non-binary, crip/disabled settler in Sḵwx̱wú7mesh, Stó:lō and Səl̓ílwətaʔ, and xʷməθkʷəy̓əm.
- **Adrian Williams** - cataloging and metadata librarian at the University of Kentucky. Black, queer, non-binary person residing on unceded Shawnee and Eastern Band Cherokee land.

4.2 Reviewers

- Garth L. Tardy, Metadata Librarian, University of Missouri–Kansas City (cis, white, queer)
- Megan Needels, Project Archivist, GLBT Historical Society. White, nonbinary, queer person residing on unceded Ramaytush and Muweka Ohlone land.
- Beck Gilmer-Osborne, Editorial Content Analyst at Netflix (via Vaco), transmedia artist and archivist. Gender variant, autistic white settler of Scottish and British descent born on Michi Saagiig Nishnaabeg Territory (Southern Ontario) and currently living as an uninvited guest on the ancestral land of the Beothuk (Newfoundland).
- Katie Berwald, non-binary, queer, early career librarian working as a collections assistant at Binghamton University which sits on the traditional lands of the Haudenosaunee people, specifically the Onondaga, Oneida, and Tuscarora Nations.
- Gene Melzack (he/him), professional background in data curation and records management.
- Rachel Newlin, Cataloging Librarian, Schaumburg Township District Library, queer person residing and living on the unceded, traditional, and ancestral lands of the people of the Council of Three Fires: the Ojibwe, Odawa, and Bodéwadmiakiwe (Potowatomi)
- Jay L. Colbert, Metadata & Discovery Strategy Librarian, University of New Hampshire. Editorial board of the Homosaurus. (white, transsexual/trans man/genderqueer, gay).
- Clair Kronk, Postdoctoral Fellow, Yale Center for Medical Informations; Editorial board of Homosaurus; Creator of the Gender, Sex, and Sexual Orientation (GSSO) ontology. (white, trans woman, bisexual)
- K. Adolpho. Kanaka Maoli (native Hawaiian) and white, trans non-binary and māhū.
- Emory LaPrade, Metadata Specialist, William & Mary; white nonbinary queer person living on lands traditionally belonging to the Cheroenhaka (Nottoway), Chickahominy, Eastern Chickahominy, Mattaponi, Monacan, Nansemond, Nottoway, Pamunkey, Patawomeck, Upper Mattaponi, and Rappahannock tribes.
- Adam L. Schiff (he/him), cis gay white man, Principal Cataloger, University of Washington Libraries, NACO and SACO trainer, and author of the SACO Participants' Manual

5. Appendices: Glossary. Recommended Resources. Sources Consulted.

5.1 Glossary of Terms

- **AACR2** (Anglo-American Cataloguing Rules 2nd edition): the cataloguing standard by which cataloguers provided bibliographic description for library catalogues and other bibliographic tools until the formal introduction and widespread adoption of RDA in 2013. AACR2 is still in use by some libraries.
- **Cataloguing**: Within the context of libraries and archives, the creation and revision of bibliographic metadata of library materials such as monographs, video recordings, etc., within a bibliographic tool in order to connect library users with that material.
- **Controlled vocabulary**: An organized index of standardized terms. Controlled vocabularies often used in GLAMS metadata. Library of Congress Subject Headings (LCSH) is an example of controlled vocabulary.
- **Creator**: A person or group responsible for the content in a resource, e.g. author, choreographer.
- **GLAMS sector**: An acronym for the types of cultural institutions that provide access to information. The acronym stands for “galleries, libraries, archives, museums, and special collections.”
- **Linked data**: structured data which is interlinked with other data so it can be read and queried by computers
- **Metadata**: Broadly, data about data. In the GLAMS context, data that describes the primary resources that the institution collects and/or provides virtual access to. Metadata is found in bibliographic records, finding aids, etc. It may be created with reference to standards and controlled vocabularies or in a more locally defined manner. Metadata is used to help users find what they’re looking for and for institutions to keep track of what they have.
- **Metadata worker**: A person who creates and maintains descriptive, administrative, and/or structural metadata within the GLAMS sector.
- **NACO** (Name Authority Cooperative Program): the cooperative project established by the Library of Congress where participating institutions contribute authority records for agents, places, works, and expressions to the LC/NACO Authority File.
- **PCC** (Program for Cooperative Cataloging): an international cooperative effort aimed at expanding access to library collections by providing useful, timely, and cost-effective cataloging that meets mutually-accepted standards of libraries around the world. The PCC has four main programs that coordinate authority and bibliographic

record creation. It also includes committees and task groups that consider a broad spectrum of cataloging issues.

- **RDA** (Resource Description Access): the cataloguing standard currently used in most libraries for the bibliographic description. In comparison to AACR2, RDA is more flexible and more suitable for use in today's digital landscape.
- **Resource**: anything for which metadata is assigned in a GLAMS context. Examples include: books, audiovisual materials, archival collections, artifacts, etc
- **Subject headings**: A term or phrase used to find and organize resources on a particular topic or range of topics.
- **Trans and gender diverse resources**: Fiction or non-fiction about trans and gender diverse people, resources about topics related to trans and gender diverse experience or gender identity, resources about gender that are inclusive of trans and gender diverse identities and experiences.

5.2 Trans and Gender Diverse LCSHs

This appendix is a list of currently-available (**as of July 18, 2023, monthly list 03**)[40] Library of Congress Subject Headings (LCSH) that can be used for trans and gender diverse resources. The most up-to-date list can be found at translcsh.com

This section does not include headings established with free-floating or geographic subdivisions. It is useful to consider these headings alongside the recommendations for their usage in Section 3.2, which includes comments about some headings and, in some cases, advises avoiding others. There are also suggestions of combinations of headings that can be used when no appropriate heading exists.

African American transgender people
African American transsexuals
Bible--Transgender interpretations
Children of transgender parents
Children of transsexual parents
Christian transgender people
Christian transsexuals
Church work with transgender people
Female-to-male transsexuals
Female-to-male transsexuals in art
Gender expression
Gender identity
Gender identity--Law and legislation
Gender identity--Religious aspects--Buddhism
Gender identity--Religious aspects--Catholic Church
Gender identity--Religious aspects--Christianity
Gender identity--Religious aspects--Church of Jesus Christ of Latter-day Saints
Gender identity--Religious aspects--Hinduism
Gender identity--Religious aspects--Islam
Gender identity--Religious aspects--Judaism
Gender identity--Religious aspects--Mormon Church
Gender identity--Religious aspects--Neopaganism
Gender identity--Religious aspects--United Methodist Church
Gender identity disorders
Gender identity disorders--Religious aspects--Christianity
Gender identity disorders in adolescence
Gender identity disorders in children
Gender identity in advertising
Gender identity in art
Gender identity in children
Gender identity in conflict management
Gender identity in dance
Gender identity in education

[40] https://classweb.org/approved-subjects/

Gender identity in literature
Gender identity in mass media
Gender identity in motion pictures
Gender identity in music
Gender identity in science
Gender identity in sports
Gender identity in the Bible
Gender identity in the Qur’an
Gender identity in the theater
Gender identity in the workplace
Gender identity on television
Gender nonconformity
Gender nonconformity--Religious aspects--Christianity
Gender nonconformity--Religious aspects--Hinduism
Gender nonconformity--Religious aspects--Islam
Gender nonconformity--Religious aspects--Judaism
Gender nonconformity--Religious aspects--Lutheran Church
Gender nonconformity--Religious aspects--Neopaganism
Gender nonconformity--Religious aspects--United Church of Canada
Gender nonconformity in literature
Gender nonconformity on television
Gender reassignment surgery
Gender transition
Gender transition (Jewish law)
Gender transition in literature
Gender transition--Law and legislation
Gender transition--Hormone therapy
Gender-neutral toilet facilities
Gender-nonconforming children
Gender-nonconforming children in literature
Gender-nonconforming people
Gender-nonconforming people’s writings
Gender-nonconforming people’s writings, American
Gender-nonconforming woodworkers
Gender-nonconforming youth
Jewish transgender people
Jewish transsexuals
Legal assistance to transgender people
Libraries and transgender people
Libraries and transsexuals
Libraries--Special collections--Gender identity
Libraries--Special collections--Transgender people
Male-to-female transsexuals
Minority transgender women
Older transgender people
Older transsexuals
Parents of transgender children
Parent of transsexuals

Social work with gender-nonconforming youth
Social work with transgender people
Social work with transgender youth
Subject headings--Gender nonconformity
Subject headings--Transsexuals
Transgender artists
Transgender athletes
Transgender children
Transgender college students
Transgender college teachers
Transgender Day of Remembrance
Transgender journalists
Transgender legislators
Transgender librarians
Transgender men
Transgender military personnel
Transgender musicians
Transgender parents
Transgender people
Transgender people in art
Transgender people in literature
Transgender people in motion pictures
Transgender people in popular culture
Transgender people’s writings
Transgender people’s writings, American
Transgender people’s writings, Canadian
Transgender police officers
Transgender prisoners
Transgender singers
Transgender students
Transgender superheroes
Transgender teachers
Transgender veterans
Transgender women
Transgender youth
Transphobia
Transsexual college students
Transsexual librarians
Transsexual parents
Transsexual students
Transsexual youth
Transsexuals
Transsexuals in literature
Transsexuals in motion pictures
Transsexuals’ writings
Transsexuals’ writings, American
Two-spirit people
Two-spirit people in literature

5.3. Sources & Annotated Bibliographies

5.3.1. Subject Headings and Authorities.

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For non-English resource, see also: Catalonian Department of Culture. “TERMCAT - Vocabulari Terminològic LGBT (Lèsbic, Gai, Bisexual i Transgènere),” June 20, 2022. https://www.termcat.cat/ca/diccionaris-en-linia/164.

4.4.2. Bibliographies & Other Sources Consulted

Archives for Black Lives in Philadelphia Anti-Racist Descriptive Resources
https://archivesforblacklives.files.wordpress.com/2020/11/ardr_202010.pdf

Annotated Bibliography for Cultural Assessment of Digital Collections (DLF) [section on Metadata and Descriptive Practice] (slightly dated, but some good gender/queer resources)
https://osf.io/94pgj/

Inclusive Metadata & Conscious Editing Resources (Sunshine State Digital Network)
https://sunshinestatedigitalnetwork.wordpress.com/2020/10/05/inclusive-metadata-conscious-editing-resources/

Language Guides

Humanizing language for those involved with the criminal justice system.
https://www.osborneny.org/resources-for-humanizing-language

Guidelines for Achieving Bias-Free Communication
https://www.adl.org/education/resources/tools-and-strategies/guidelines-for-achieving-bias-free-communication

Example of Content Warnings and other Language considerations
https://www.findandconnect.gov.au/about/policies/language-policy-the-words-we-use/

List of Statements on Bias in Library and Archives Description
http://cataloginglab.org/list-of-statements-on-bias-in-library-and-archives-description/

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Digital Transgender Archive Glossary of Trans-Related Terminology
https://www.digitaltransgenderarchive.net/learn/glossary

The Trevor Project. “Understanding Gender Identities.” The Trevor Project, August 23, 2021. https://www.thetrevorproject.org/resources/article/understanding-gender-identities/.

Name Authority Records

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Billey, A., & Drabinski, E. (2019). Questioning Authority: Changing Library Cataloging Standards to Be More Inclusive to a Gender Identity Spectrum. Transgender Studies Quarterly, 6(1), 117-123.

Billey, A. (2019). Just Because We Can, Doesn’t Mean We Should: An Argument for Simplicity and Data Privacy With Name Authority Work in the Linked Data Environment. Journal of Library Metadata, 19(1-2), 1-17.

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Ethical Recommendations

The below are only reflective of a minority of consulted resources. See Watson, Brian M. “The Critical Cataloging Database.” CritCat.org, 2021. https://critcat.org/ for the full list.

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