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"Don't just slap on gay:" Validating and developing findings from the largest qualitative interview of (and community-based participatory action by) queer knowledge workers

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Abstract

Galleries, Archives, Libraries, Museums, and Special Collections (GLAMS) play a vital role in preserving society's traditions and history and use knowledge organization systems (KOSes) developed and maintained by knowledge workers to organize items and preserve information about the items and their creators. Large KOSes are built over centuries and change slowly, thereby containing outdated and offensive terminology. Understanding how members of those communities who work in GLAMS as knowledge workers utilize, maintain, and develop KOSes can contribute to inclusive and effective approaches in knowledge organization as well as cultural heritage representation. This long paper draws from findings from community-based participatory action research and qualitative interviews with more than 50 queer-identifying GLAMS knowledge workers to advance inclusive and effective knowledge organization practices.

1.0 Introduction and Previous Literature

Galleries, Archives, Libraries, Museums, and Special Collections (GLAMS) play a vital role in preserving society's traditions and history. To organize their collections and preserve information about the contents, items, and creators of those collections, GLAMS use knowledge organization systems (KOSes) of varying complexity. Large and complex KOSes are built over the course of centuries and change slowly, and thereby contain outdated and offensive terms for marginalized groups. Historically, members of these groups weren't consulted about appropriate labels and often still aren't. Understanding how members of marginalized groups who work in GLAMS as cataloguers, archivists, registrars, or metadata workers (henceforth: knowledge workers) choose labels when the correct word is absent and how they decide which labels should be used instead, can contribute to inclusive and effective approaches in knowledge organization as well as cultural heritage management.

The project discussed here originates from two sources: (1) my experience as a cofounder of and coordinator for the Trans (2022) and the Queer Metadata Collectives (2024)—henceforth: TMDC and QMDC—and (2) my comprehensive review of a century of literature about critical cataloging from 1933 to the present day (Watson 2021a, 2021b, 2023), both undertaken as part of my dissertation research. As the TMDC/QMDC were collective efforts which created shared documents (2022; 2024) and discussed elsewhere (Watson 2024a, 2024b) they will not be discussed in depth here, but are important background to the discussion below. Critical Cataloguing (CritCat) is a descriptor for a variety of critical

approaches to the cataloguing, classification, and creation of metadata for resources in GLAMS and in other information systems. It places an emphasis on "radical empathy" (Caswell and Cifor 2016; Fox and Swickard 2019, 19) and "outreach work" (Gross and Fox 2019; Buccicone and Leaman 2021), and recognizes the importance of "information maintenance as a practice of care" (The Information Maintainers et al. 2019). As a result of these experiences and this review I arrived at a hypothesis which argued that members of marginalized or intersectional communities were the best-placed individuals to consult about the description of their community, their work, or themselves (as subjects). Though seemingly straightforward, this claim ran contrary to nearly a century of professional GLAMS scholarship and three centuries of taxonomic literature, which instead centers WEB3CH2A2MS perspectives (white, ethnically European, bourgeois, Christian, cisgender, citizen, heterosexual, able-bodied, allosexual, monogamous, male settlers; pronounced *web-sham*). WEB3CH3AMS is a term developed by Hope Olson (2001) and expanded by Michelle Caswell (2019) and myself (2021a; 2021) to refer to the unnamed centre of knowledge organization systems. Resultingly, my doctoral dissertation—which focused on the topic of "how to fix marginalization in systems"—and projects related to the dissertation involved more than 1000 people, utilized historiographical, community-based participatory action (CBPAR), qualitative interview (Qi) and focus group research and culminated in a 1300+ page document (700 of text, 600 of appendices). This paper focuses specifically on the topic of KOSes viewed through the CBPAR and Qi research.

2.0 Methods

Following ethics review and approval in the fall of 2023, I began data collection in two stages: (1) a semi-structured qualitative interview (Qi) process and (2) a series of working focus groups comprised of Qi members. For reasons of space, this article focuses only on (1). Recruitment took place on professional listservs and social media platforms frequented by cultural heritage professionals, and respondents completed a screening questionnaire to ensure they meet my inclusion criteria of (1) working or volunteering in a cultural heritage institution (GLAMS); (2) spent at least 20% of their time on knowledge organization work; and (3) publicly identifying as a member of the queer community. The criteria were selected to be deliberately broad, and written to be inclusive of community-based, non-degreed, and Indigenous knowledge work. Although this approach substantially increased the project's scale and complexity, it proved beneficial in retrospect; participants from non-conventional backgrounds frequently contributed novel and distinctive perspectives. My initial recruitment call received 123 responses in less than a fortnight, a level of engagement extremely unusual in qualitative studies, which tend to be based on a small pool of 10 to 20 interviews on the grounds that this range is sufficient to reach saturation. A review of ProQuest dissertations focusing on knowledge work confirmed this unusual response: Wagner's dissertation (2022) interviewed 13 cataloguers; Woods (2021) interviewed 15 library catalogers; Dobreski (2019) interviewed 12 library catalogers; Escobar (2019) interviewed 15 LGBTQIA young adults; and Joudrey's (2006) dissertation was based on responses from 18 students.

I recognized this recruitment success as a unique opportunity, and aimed to make the most of it by conducting as many interviews as possible, even at the risk of having less time to complete thorough and iterative rounds of coding. Over the course of 2024, I sent interview invitations to 100 of 123 respondents and received responses from 75 of those. Ultimately, I conducted and compensated 64 qualitative interviews. Of these, 55 interviews (86%) were completed in full—meaning that every stage of the research process (initial contact, invitation, consent form, formal consent, interview, transcription, transcript checking, and final consent) was finalized in time for inclusion. However, in early 2025—following the inauguration of Donald Trump to his second term as U.S. president and the chaos that followed—five interviewees contacted me to withdraw their participation, citing fears of legal, political, or social repercussions due to the risk of involvement in this project as perceived as too EDI-aligned (Equity, Diversity, and Inclusion). In accordance with their wishes, all data associated was destroyed. As a result, discussion draws on 50 finalized transcripts (representing 78% of completed interviews) as the empirical basis for its analysis. To reimpress upon the reader the scale: this study "lost" the equivalent of 25-33% of a standard (n=15-20) qualitative research study participants and still remains one of the largest investigations of cataloguers undertaken. This decision shaped both the scope and constraints of my dissertation as well as what will be discussed here, but ultimately, this project constitutes one of the largest qualitative interview studies of GLAMS workers ever.

Participants who completed the study received and signed electronic consent forms, which were stored securely and separately from data. Throughout the project, participants remained pseudonymous unless they explicitly chose otherwise. In transcripts and quotations below, those who consented to named attribution are identified by first and last name; those who chose pseudonymity by a single name. Audio recordings were kept on a password-protected, encrypted, offline drive and deleted after participant-verified transcription. I estimated that Qi participation *in toto* (consent form, interview, transcript checking) would take about 90 minutes; so to recognize the labour of my participants (as well as holding my requests of their time and labour to a higher standard), I remunerated them for their participation in both the Qis and the focus groups, if applicable. Interview remuneration was pegged to the average half-hourly pay of professional catalogers in North America based on job listings ($35 CAD / ~$25 USD), and regardless of their participation in one or both stages of the project participants were paid immediately upon completion of either, rather than the typical practice of "holding out" remuneration until completion of transcript checking. 100% of transcripts were returned.

In alignment with my research design, I adopted a phronetic iterative coding approach, which integrates inductive openness with theoretically informed categorization, grounded in the concept of *phronesis*—practical wisdom or ethical reasoning (Tracy 2018; Tracy and Hinrichs 2017). This approach is particularly well-suited to research with normative, applied, and emancipatory aims, such as investigating cataloging practices and their consequences for marginalized identities (Tracy 2020) and enables the researcher to remain attentive to participant experience while engaging critically with theoretical frameworks in an evolving, cyclical analytic process. Following established protocols for phronetic iterative analysis, I structured the coding into two principal stages: primary (open)

coding and secondary (focused/thematic) coding. In the primary phase, I took an inductive stance, attending to emergent meaning and foregrounding participants' own language and conceptual framing with *in vivo* codes (Creswell and Creswell 2017) and in the secondary phase I took a more deductive and thematic approach reorganizing the initial codes in light of relevant theoretical and empirical literature (Braun and Clarke 2006; Tracy 2020). Secondary coding began after approximately 20% (n = 11) of my interviews had been completed (~50% of usual participant interviews); throughout, I employed constant comparative method to refine codes iteratively as new data emerged (Tracy 2020, 90).

One significant limitation must be acknowledged: a reviewer of the dissertation noted the absence of a rigorous coding verification stage, which is correct and largely due to the time constraints of a doctoral program. This is perhaps already obvious and/or has been indicated by my choice to interview more than 50 participants when saturation could have been reached at the standard ~20. The interviews are currently being recoded with multiple coders and an intercoder agreement protocol, but here I eschew and defer discussion of specific systems or strategies adopted to future work and below I instead focus on how the two most significant methods (Qi and CBPAR) influenced each other.

3.0 Findings

Nearly three-fifths (n=28) of knowledge workers reported working in libraries (19 in academic libraries, eight in public libraries, and one in a special library). Eleven were based in archives—five in community archives and six in traditional archival (usually university) repositories. Of the remaining 11 participants, six work in special-collections units and seven in museums or galleries. Twelve participants reported completing NACO name-authority training, and nine had completed SACO subject-heading training through the Program for Cooperative Cataloging. Years of practice varied widely, but the grand total was 390 cumulative person-years, with a mean of approximately 7.5 years in the field. Participants were predominantly located in North America; 6 in Canada, and 41 in the United States, with representation from every major U.S. census region (Midwest 8, Northeast 13, South 9, West 7). The four remaining participants were located in Europe or did not specify a country.

Table 1 Descriptive statistics of the 50 participants

Person-Years of Experience	
1-3 years = 7 participants	totalling **~10 years**
3-5 years = 4 participants	totalling **~16 years**
5-10 years = 23 participants	totalling **~161 years**
10-15 years = 11 participants	totalling **~143 years**
15-25+ years = 3 participants	totalling **~60 years**
Average (mean): 7.5 years	Grand Total: ~**390 years**

Geographic Location	
United States = (41)	
Northeast: 13	Midwest: 8
Southern: 9	Western: 7
Canada = 6	
Europe / Unspecified = 4	

Participant Contexts		PCC
Archivist total = 11	5 – Community Archives 6 – Traditional Archives	NACO-trained = 12 SACO-trained = 9
Librarian total = 26	8 – Public Libraries 19 – Academic Libraries 1 – Special Library	
Museum/other = 11	7 – Museums/Galleries 6 – Special Collections	

A wide range of sexual, gender, romantic, and relationship orientations were reported and are summarized below; participants were not limited to picking one identity off of a list and were able to state as many identities per category as they liked. For analysis and reporting I combined responses of trans identities oriented towards one aspect of the gender spectrum (i.e. “Transmasculine” “transmasc” “transman” and “masc” combined) and also combined Bi/Pansexual respondents. This was my choice, and not necessarily reflective of how participants would have combined themselves; for example, many pansexual people have objections towards being combined (or “lumped in”) with bisexual people.

Seventeen respondents located themselves on the asexual spectrum (acespec): fifteen specifically as asexual and two as demisexual. Among those claiming an allosexual identity (allospec) the largest single category was queer (25), followed by bi- or pansexual (13), lesbian (7), and gay (5). Just under one-third of the group specifically identified as cisgender (18). A further twelve described themselves as non-binary, two as agender, and eleven as trans. Within the transgender subset, three participants used labels such as trans woman, feminine, or femme; seven used trans man, masculine, or masc; and one preferred transsexual. Seven additional respondents chose rarer terms (e.g. unsure, faggot, genderfluid, genderqueer, “Queer to all”, “it’s a process”). Those labelled as “unspecified” might have assumed I would guess their gender orientation from their pronouns (i.e. Fiona: “I would describe myself as panromantic and asexual. And I use she/her pronouns.”) or that I would use “Queer” as their gender marker (i.e. Kate: “I think queer is pretty all encompassing”). Ten participants described their relationship style as polyamorous or ethically non-monogamous (ENM); five identified as aromantic; four indicated another romantic identity such as panromantic; two affirmed monogamy and a substantial number

(31) did not specify. As several participants listed multiple labels, label subtotals for sexual (67), gender (58), and relationship orientations (52) are larger than the study cohort (50).

Table 2 Participant identities

Sexual Orientation (67)	**Gender Orientation (58)**
Ace-spectrum (17)	**Cisgender** = 18
Asexual = 15	**Agender** = 2
Demisexual = 2	**Nonbinary** = 12
Allo-spectrum = (50)	**Transgender** = 11
Bi/Pansexual = 13	Transwomen / transfeminine / transfemme = 3
Gay = 5	Transmen / transmasculine / transman = 7
Lesbian = 7	**Other** = 7 (Genderfluid / Faggot / Unsure / "It's a process" /
Queer = 25	"Queer to all three")
	Unspecified = 8
Relationship/Romantic Orientation (52)	
	Aromantic = 5
	Monogamous = 2
	Polyamorous / ENM = 10
	Other = 4 (Panromantic / Biromantic / "Queer to all 3")

4.0 Discussion: An 'Accidental' Validation of CBPAR

As stated in the Introduction, concurrently and alongside my dissertation field research (2023-2025) I was also engaged in coordinating the Trans Metadata Collective (2021-2022) and the Queer Metadata Collective (2022-24), efforts involving ~100 (TMDC) and ~1000 (QMDC) knowledge workers with a concerted interest in improving the description and classification of queer, trans and gender diverse people in GLAMS and other sociotechnical systems. Due to the overlapping chronology of these efforts, it is worth acknowledging the co-emergent nature of Q/TMDC recommendations, which is to say that there is a blurred boundary between "interviewee/participant" and "collective member" which complicates attribution. My estimate is that roughly one-fifth of participants also belonged to either the TMDC or the QMDC, and—given the scale of both initiatives—some undoubtedly moved between adjacent community spaces, influencing each set of recommendations indirectly.

However, one of the most compelling findings of the Qis is how, through standard academic research methods, I found myself arriving again and again at the same conclusions and recommendations as the Q/TMDC. The reason this is compelling (and, I think, significant) is that it affirms the legitimacy and methodological rigor of community-based approaches to knowledge production. What I mean is this: when a problem is identified, the usual academic approach is to first conduct research in order to examine and understand it from many angles, to develop and discuss proposals, run small-scale pilots, etc. This model assumes that one must conduct academic research in narrowly defined ways that adhere to institutional expectations, strict methodological standards and are subject to peer-review. It is only after this process, when the work is wrapped up in the formal language of

academia that it requires "knowledge translation," or “transfer” that might then ‘activate’ a community. However, I believe that this study has (unintentionally) stumbled upon the fact a CBPAR can and will arrive at many (if not all) of the exact same conclusions / recommendations that an academic research project would.

More formally stated: conventional academic frameworks emphasize a linear progression: research must first be conducted within institutionally sanctioned paradigms, articulated through formalized scholarly discourse, be subject to peer review, and only then can it be rendered legible to community audiences through “knowledge translation” (Government of Canada 2012; Bowen and Graham 2013; Fredericks et al. 2015; Chia-Kangata et al. 2020; Wine 2020). This model presumes a hierarchical flow of knowledge and often construes community engagement as a secondary or ‘extra’ phase. I am arguing that this study demonstrates CBPAR can yield recommendations that are *substantively similar or identical* to ones emerging from formal academic research. This is a challenge to the presumed epistemic boundary between scholarly and community knowledge production. A good example of what I mean is provided by Lisa’s interview, when she recounted the story of how she addressed spine labels for LGBTQ+ books at her library, which I’ll quote in full for the importance of my point:

> INTERVIEWEE (Lisa): A very well-meaning straight ally previously had labeled a lot of books as LGBTQ with a genre label sticker on the spine. And part of me liked that, because it brought more LGBTQ+ fiction to the forefront...The part that I didn't like so much is that [the label] highlights so much; like, is it safe for somebody? Is that that safe for someone—a kid, or children—to take that off the shelf and bring home? [TO ME] it felt like [THE LABEL] highlighted [QUEERNESS] in a way that maybe was not very well-intentioned. As a librarian, I didn't love that these books were called out as a genre [EITHER]. Because to me, as a queer person, that felt very othering. And I wanted the public library to be a safe space and I wanted people to be able to access those books. So what I did instead is I ended up taking those genre labels off...I took those off the books and ended up putting up little informational help sheets near the OPACs we had in the YA room as, hey, here's how you find LGBTQ+ materials in our catalog. Here's how you search these things. If you need help finding something, come and ask us. This is a safe space. We will help you find everything. Everything you check out is private. To me, that was on the forefront of dealing with a public day in and day out, a safer way to highlight that collection rather than sticking a big rainbow sticker on the spine.

Lisa was the only interviewee to mention spine labels in her interview (perhaps because I wasn’t specifically asking about classification) so it did not meet my internal threshold (of usually n+3) mentions to pass it on to a working group or to develop it as a formal recommendation myself. However, I did make note of it in my coding as an “Important Story” to return to in writeup, but only re-encountered it when the QMDC Classification group ended up addressing labels and made a recommendation that matches Lisa’s actions:

> [A]lternatives... allow for collocation without separation. Creating a subject guide, collection tag, or applying local subject headings can also help gather resources

> without having to group on the shelf. Signage or other communication is better than collocating by classification. Some libraries may not "minoritize" these materials by classifying them separately and instead may put stickers on queer resources to identify them. Putting stickers on queer resources increases one's ability to find items in a universalised system, but could make people feel uncomfortable or unsafe using resources. Based on interviews with librarians serving youth, teen, and young adult populations we **highly recommend *NEVER*** physically labelling [queer] materials in teen-and youth-specific collections due to safety concerns. For adult collections, we also recommend that libraries avoid physically labelling these materials to best serve the safety and comfort of users. Metadata workers should weigh these decisions in consultation within their institutions and their local queer communities (The Queer Metadata Collective et al. 2024, 23; emphasis in original).

To offer another example: in some cases, Qi questions were inspired by unresolved or open questions which emerged from my TMDC work. For example, a common question the TMDC received following the publication of the *Recommendations* runs something along the lines of "what do I prioritize" or "what is the most important thing (on this recommendation list) to do?" The answer to both questions (and what I answered) is along the lines of "it really depends upon what you are trying to achieve." Beyond that, my recommendation has been/would be that the inquirer (person or institution) should pay a trans metadata worker to review their system / situation and develop recommendations to address it. But sometimes this question came in the form of "*who* should I prioritize." For example: while in Vancouver, I served as a Co-Coordinator and board president for Out On The Shelves, a community-owned and operated 2SLGBTQIA+ library. The "who should be prioritized" question came in the form of an Indigenous author, who was described by his nation in a particular way (a term similar to "Two-Spirit") but the author himself, on his website and social media repeatedly disavowed that label. In this instance, the TMDC *Recommendations* would be useful, but not definitive, as they do not offer an ordering of their recommendations. Furthermore, even though the *Recommendations* are in no particular order, TMDC's suggestion to

> Use culturally and contextually appropriate labels for trans and gender diverse communities and subjects…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 (The Trans Metadata Collective et al. 2022, 5; bolding in original).

does occur before the recommendation to

> 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 (The Trans Metadata Collective et al. 2022, 5).

To develop this discussion further: at first blush, the shared TMDC and QMDC recommendations to "Use Culturally & Contextually Appropriate Labels" and consult with

specific communities and the recommendation to "Correctly name and identify trans individuals" seem remarkably similar, but they can be distinguished by *who* is doing the labour. The former recommendation places the onus on the knowledge worker to do the appropriate investigation and research whereas the latter recommendation places the onus on (recompensed and respectfully treated) community members. Neither recommendation necessarily predominates over the other, but I (and I suspect, other Collective members) would prioritize a community's recommendation unless there was a reason to not (i.e. the creator's express wishes).

The fact that several participants *also* recommended these two strategies helps to validate the Q/TMDC *Recommendations* and CBPAR more generally and to build upon it. A story from Rhys Elia, Archivist for Special Collections at the University of Buffalo demonstrates this well. When I asked them what strategies they would recommend to non-queer colleagues and they described their approach with archival processors:

> INTERVIEWEE (Rhys Elia): We encourage our archival processors this way: "you don't have to have the same lived experience, but if you really feel like your experience is so different from the materials or the people represented to the point where you have to think about whether you have the expertise [to process the material] you should either be able to consult an expert if needed or consult sources, and you should know what sources you should be consulting, essentially." Like, don't just like go to LCSH and slap on "gay" or something. [Instead, ask yourself if] you need to add something." An example: we have the papers from a [TRANSWOMAN POET] who was a very early on user of neopronouns. They're kind of very flexible about gender and that kind of thing in general. So…just being like, "okay, this is a transwoman poet, LCSH would not represent all the ways that gender informed her work." And so [in that case] I encouraged the processor who was working on it—a straight cis guy—to be very thoughtful. I was like, "sit around and like do some research, read her work, like, look at our blog posts like that kind of thing and see what other things we can bring into both the like descriptors, the terms and that kind of stuff." So basically just, you know, if it's really different from your life, make sure you're spending some time and ask somebody else to look at it.

Rhys told this story again in a focus group with the additional detail that the 'straight cis guy' did an excellent job at developing a thoughtful and nuanced finding aid.

As a result, I became very interested in exactly what order terms should be preferred and began coding and collecting stories of how participants had "dealt with" deceased creators in their knowledge work. Multiple participants (n=19) responded to either my question about "what they had done when they knew the right term [as a queer person] but the system they were using did not have it" or in response to my question about if they had ever seen themselves represented in a GLAMS and through my interviews, coding and research for QMDC I developed what I referred to as "The Chain of Trust," which advises users to "prioritise terms used within a community, which may include reclaimed or self-ascribed slurs or otherwise sensitive language," even if those terms aren't found in controlled vocabularies and then recommends the process for uncontactable subjects:

> In the event that the creator is deceased or no appropriate cultural contact is found, consider consultation with the following sources or groups (if possible) in this order of preference: (1) public statements by the individual; (2) correspondence; (3) partner(s) at time of death; (4) chosen family members; (5) community members; (6) children (adopted or biological); and (7) *if all other options are exhausted*: family of origin (The Queer Metadata Collective et al. 2024, 12)

By structuring a clear sequence of consultation fallbacks beginning with the creator's documented preferences and moving through their intimate and relational network before (reluctantly) suggesting family of origin, the Chain of Trust operationalizes and encourages a preference for community warrant over external controlled vocabularies for subject description and is designed to give knowledge workers the best possible chance of finding a term that the creator themselves might "see themselves existing" (Caswell et al. 2016).

5.0 Future Work and Conclusion

This long paper has discussed early considerations from how the utilization of two methods (qualitative interview research and community-based participatory action research) for two large-scale projects influenced and informed each other in relation to queer knowledge workers, GLAMS, and knowledge organization systems. As stated earlier, this is definitely the largest study of queer knowledge workers and likely one of the largest studies of knowledge workers generally. Due to reasons of space and in order to improve the rigor and applicability of findings, the discussion here omits early findings from the project as a whole. Future work will touch on further results from these projects (and also include discussion of the five focus groups which followed the qualitative interviews). These publications will likely include recommendations for how to better handle and improve the metadata, cataloging, and classification of queer individuals, communities and their works. Additionally, terminology developed by participants will be used to improve subject vocabularies such as the Homosaurus. Other findings will include recommendations for creator input into the revision and maintenance of these standardized systems and recommendations for how to improve subject description and systems generally.

AI Statement: No "Artificial" "Intelligence" nor generative large language models were used in the ideation, creation, development, editing, presentation or publication of this research.

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