

# **RBMS BSC Task Group on Addressing Diversity, Equity, and Inclusion in Bibliographic Standards and Bibliographic Description**

Final Report  
2021-06-02

## **Charge**

The task group is to assess existing work on best practices for creating institutional statements on harmful language and bias in cataloging, and to identify what work is in scope for BSC and what work should be undertaken in collaboration with other groups, both within RBMS and externally.

## **Members**

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## **Overview and work conducted**

The task group held six virtual meetings during the period of March to May 2021, along with extensive asynchronous work and separate subgroup meetings. Initial work involved conducting a review and evaluation of existing institutional statements on harmful language and bias in metadata description,<sup>1</sup> mainly to provide an at-a-glance list of existing efforts to avoid redundancies and establish commonalities. The list was informed largely by an existing compilation of statements by Violet Fox, as published on the Cataloging Lab.<sup>2</sup> From there, the

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<sup>1</sup> BSC DEI Task Group's compiled spreadsheet of [Review of existing DEI resources](#)

<sup>2</sup> Cataloging Lab's [List of statements on bias in library and archives description](#)

task group was able to identify affinities with efforts from other institutions and groups such as the PCC, OCLC, SAA, and the Cataloging Ethics Steering Committee, that could be areas for collaboration or determined as out of scope for BSC. This evaluation also helped the task group to further identify and refine issues specific to the special collections community, as well as unmet community needs that should inform focus areas for BSC to prioritize in future work as outlined.

## Recommendations

### 1. Statements on harmful metadata

The BSC must be an advocate and guide for the creation of institutional statements on the presence of harmful metadata in resource descriptions, whether the data stem from legacy descriptive practices or from the transcription of offensive text from the resource itself. In order to empower institutions to take on this work, we recommend that BSC issue a statement underlining the importance of DEI work, define the scope of harmful metadata statements and develop best practices that are specific to rare materials cataloging. Practical guidance from BSC on how to write these statements is especially important to the rare materials cataloging community. Such guidance could include a template with boilerplate terminology that institutions could adapt to their own needs and recommendations on how statements should be displayed. This documentation, as well as examples of existing institutional statements on harmful metadata, could be included in a DEI toolkit developed and maintained by BSC.

### 2. Remediation of metadata; eliminating bias in current cataloging practices

#### Transcription of offensive language from the resource

The preservation of titles, captions, and other information as they appear on resources, even when they include offensive or harmful language, is an important part of the accurate presentation of historical materials; accurate transcriptions facilitate research and access. Because the transcription of harmful language is unavoidable when cataloging some historical special collections materials, it is important for institutions describing such materials to provide transparency to end users regarding transcription practices. One way that the BSC can educate catalogers and end users is by developing a best practices document on the transcription of offensive text, with a special focus on title (often the most prominent element in a catalog display) and the creation of contextual notes. The creation of such notes is a key part of preserving transcribed text while also clarifying the historical and cultural context in which harmful language was used in a resource. We recommend that the BSC create or compile examples of contextual notes or markup that may be used when offensive language must be transcribed in a description. We also recommend that institutions alert users to the presence of transcribed harmful language via a "trigger

warning" or similar statement in the catalog or library website; BSC best practices could provide guidance on the format, display, and placement for these statements.

### Controlled Vocabularies

Within bibliographic description, controlled vocabularies play a crucial role in identifying and indexing harmful materials (through genre/form terms), highlighting contributions from marginalized communities and their members (through relationship designators), and describing individuals and communities in subject access points. They also offer terminology to describe individuals and communities in authority records, when appropriate. However, controlled vocabularies inherently reflect the biases of their creators, and can both amplify harm and minimize and/or silence the voices of marginalized communities. We recommend that BSC maintain an annotated list (possibly within a DEI toolkit) of controlled vocabularies relevant to the above. The list may point to entire resources, such as Homosaurus, but may also highlight relevant hierarchies in more broadly scoped vocabularies, such as the Art and Architecture Thesaurus, or the RBMS Controlled Vocabularies (RBMS CV). We also encourage BSC to identify ways for its membership to participate in RBMS CV initiatives in this area, realizing that many members may have developed expertise due to collections housed at their institutions. Finally, we recommend a BSC-sponsored event, such as a webinar, bringing together editors of relevant vocabularies such as RBMS CV, Homosaurus, and others to discuss scope and application of the vocabularies in these areas. BSC should consider reaching out to the Diversity Committee as co-sponsor.

### Copy Cataloging

Copy cataloging culturally sensitive or harmful material is a tricky prospect, and the main issues that this group brainstormed concerned the management and supervision of copy catalogers who may encounter such materials. It is our stance that copy catalogers must be appropriately prepared and empowered by their supervisors to make changes in records where necessary, and that time spent on such changes must be declared necessary, justified, and appreciated. If it is not appropriate for a copy cataloger to make such changes, arrangements must be made to ensure the material is handled by an appropriate staff member. BSC could support these activities by developing a series of best practices, training materials and talking points between supervisors and copy catalogers. Additionally, BSC could liaise with relevant technical services interest groups to provide guidelines for the evaluation of workflows and best practices for keeping statistics so that the time spent by copy catalogers updating and editing records to remove harmful language is properly tracked and accounted for in performance reviews. We also recommend an environmental scan on current institutional practices in this area to further inform additional needs.

### Effective collaboration with systems or collection development units

There are a number of cases that evidence the benefits of effective collaboration with systems or collection development units towards achieving more diverse and inclusive

descriptive practices. The Change the Subject initiative,<sup>3</sup> joined by many libraries across the country to replace the display on local discovery interfaces of offensive and outdated controlled terms in favor of less biased wording, is a proof of concept for situations where either national policies or local metadata workflows do not allow for the source data updates. Collection development and cataloging prioritization is another area that impacts local descriptive practices and legacy metadata remediation. An effective collaboration with curatorial teams should provide an appropriate framework to ensure that an inclusive approach to cataloging is included within collection development ethics. To this end, we recommend BSC to liaise with RUSA, Core and RBMS Curators and Conservators Discussion Group to: (1) develop guidance in identifying where systems can remediate systemic racism and non-inclusive terminology, notably where content standards limit our efforts; (2) develop talking points for catalogers and curators to discuss prioritization of diverse collections; and (3) issue a statement on the importance of engagement with communities from whom our collections derive in cataloging of those materials. Finally, as institutions work on Diversity and Inclusion audits, it would be relevant to include questions about engagement between catalogers, systems and collection development; we recommend BSC develop recommendations for these questions.

#### Data remediation tools, scripts, examples

As a result of legacy cataloging practices, descriptions of historical materials may contain metadata that is harmful or offensive. Remediation of this legacy data is a critical component of reparative metadata practices. Remediating data at scale requires tools such as software and scripts. We recommend that BSC assist with making scripts and other tools readily available to the rare materials cataloging community by compiling or providing relevant links in a DEI toolkit or elsewhere on the RBMS website. Many institutions and associations are already engaged in data remediation. The BSC should consider collaborating with other groups working on MARC remediation and conduct an environmental scan of the DEI-focused remediation efforts in which rare materials institutions are engaged. To assist catalogers with developing the technical skills needed for data remediation, we recommend that BSC develop or promote webinars or courses on programming and metadata wrangling geared toward rare materials catalogers.

#### Western bias in BSC standards

Cataloging standards and vocabularies for some categories of non-Western materials already exist (e.g., Descriptive Cataloging Guidelines for Pre-Meiji Japanese Books, Art & Architecture Thesaurus). Broadening existing BSC standards to more fully include non-Western materials would unnecessarily duplicate these standards, likely require additional expertise (for example, in the relevant languages, formats, and subjects) and may, in fact, cause further (albeit inadvertent) harm to members of these communities. Alternatively,

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<sup>3</sup> Dartmouth's Change the Subject documentary film: <https://www.library.dartmouth.edu/digital/digital-collections/change-the-subject>

BSC should consider adding language to existing and legacy standards to more explicitly acknowledge their predominantly Western focus. Existing BSC standards should also point to available standards that better represent non-Western materials either within the text or via an appendix. In addition, examples included in BSC standards should be diversified to include non-Western materials as well as a greater diversity of Western materials, including modern works that represent more diverse cultural experiences. Future groups may also wish to consider areas for possible expansion of existing and future standards, such as including additional instructions for transliteration from non-Latin scripts and languages, or adding controlled vocabulary terms for more non-Western genres, bindings, or papers.

### 3. Supporting staff

#### Labor ethics

Major concerns with labor ethics include reliance on term-limited positions, such as diversity residencies, internships, and grant-funded projects, or reliance on free labor and volunteers to create equitable descriptions. To address these problems, BSC should advocate for the creation of long-term and permanent positions. Further, BSC could consider partnering with institutions and external funders to build sustainable programs. Term-limited positions will likely continue to exist, but BSC could create a set of guidelines to ensure that these positions support long-term career paths. These recommendations should also include an examination of equity issues, including pay and benefits (e.g., financial support for interviews, relocation, and conference participation). BSC should consider developing conference programs on critical cataloging and to foster understanding of the work performed by catalogers. BSC should investigate establishing partnerships with organizations such as the Digital Library Federation Working Group on Labor in Digital Libraries, Archives, and Museums.<sup>4</sup> Finally, BSC may also want to consider encouraging rare materials catalogers to serve as RBMS mentors to better support early-career librarians.

### 4. Consulting/working with communities

One of the most important aspects of working with communities affected by problematic metadata is to have a clear avenue for community engagement and feedback. Both patron experience as well as the cultural expectations of the communities that our collections represent need to inform metadata remediation projects as well as new metadata creation. Feedback from these communities must be considered as a crucial form of community engagement. We need to gather concrete data from users in order to better understand how people search and see themselves in our libraries' collections. We also need to draw a distinction between collections that are harmful in their descriptions and those that obscure the presence of underrepresented/marginalized groups. A commonly used approach to hear from library users and the wider community is to provide a prominently-linked feedback form

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<sup>4</sup> DLF Working Group on Labor in Digital Libraries, Archives and Museums: <https://www.diglib.org/groups/dlf-working-group-on-labor-in-digital-libraries/> (accessed 5/25/2021)

on a library's website. A library working group, committee or designated person monitors the submissions, evaluates feedback and responds to the user's suggestions. The length and format of the feedback form matters; we need to make it as easy as possible for users to flag problems. The burden of justifying or providing a rationale for why a term is problematic or triggering should not be placed on the user. That intellectual heavy lifting should be done by the librarians requesting feedback, not the user who is flagging a problematic term or phrase.

In order to have a conversation with community stakeholders about how to address the systemic issues of bias and racial equity within our current collection description infrastructure, we need to collaborate with our public-facing colleagues, such as reference and subject librarians. Within ALA, we recommend that BSC reach out to RUSA and the RBMS Instruction and Outreach Committee to think about how to engage directly with library patrons to encourage open feedback about problematic content within the library catalog. Further, we should collaborate with organizations representing colleagues from other library units about how to integrate technical services departments into broader library-wide and institutional DEI initiatives. We need to think with our peers in reference services about cataloging and metadata remediation as a form of community outreach.

Outside of ALA, we recommend that BSC reach out to the OCLC Research Library Partnership since they are currently working on a grant-funded project entitled "Reimagine Descriptive Workflows" that seeks to "convene a diverse group of experts, practitioners, and community members to determine ways of improving descriptive practices, tools, infrastructure, and workflows in libraries and archives. This series of collective, community-centered efforts will explore opportunities for reforming our systems and to chart a path toward implementation of antiracist and inclusive language in metadata descriptions at scale and at a community level."<sup>5</sup> Collaboration represents an opportunity for BSC to learn from OCLC's efforts, to gain a better understanding of the problem space, to create scalable pathways to address harmful descriptive practices and to identify further research and learning opportunities. BSC should also explore opportunities for partnership with the PCC's recently-formed Advisory Committee on Diversity, Equity, and Inclusion.

We also recommend BSC explore collaborating with ALA affiliate groups such as ARLIS, BCALA, APALA, REFORMA, and SALALM. The BSC should identify which metadata remediation concerns are being addressed by particular committees or sections within these affiliate groups and seek opportunities for collaboration. Specific committees for outreach considerations include the ARLIS Cataloging Advisory Committee; ARLIS Diversity & Inclusion Committee; BCALA Programs Committee; APALA Program Planning Committee; REFORMA Technology Committee; SALALM Cataloging and Bibliographic Technology Subcommittee of the Library Operations & Services Committee; SALALM Access and Bibliography Committee.

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<sup>5</sup> OCLC. "Equity, Diversity, and Inclusion Initiatives: Reimagine Descriptive Workflows": <https://www.oclc.org/research/areas/community-catalysts/reimagine-descriptive-workflows.html> (accessed 2021-05-26)

## 5. Developing programs

The BSC has an existing subgroup, the Program Planning Group, charged with developing programs for conferences. Due to the shift of RBMS 2021 to a virtual format, the Program Planning Group's charge has expanded to include developing webinars on topics related to rare materials cataloging. While scheduling for RBMS conferences will be limited to designated conferences, webinars may offer flexible scheduling. Hence, future BSC task groups should consider collaborating with the BSC Program Planning Group to develop programming.

Another recommended avenue for collaboration within RBMS is to work with the Diversity Committee to co-organize a webinar series, a virtual participatory discussion session or series, or to co-host a participant-driven session or seminar at a future RBMS conference on the topic of metadata remediation and eliminating bias in current cataloging practices. For instance, these sessions can showcase examples of reparative description projects already underway within the RBMS community and provide an opportunity to learn from our peers. Further, these sessions would offer an opportunity to discuss and reflect on the work yet to be done. The BSC and Diversity Committee could work together to create a Google Form and request submissions on reparative description projects. Project examples can be found in the task group's Review of Existing Resources spreadsheet. The BSC and RBMS could showcase a few of these projects in a webinar series, discussion session, or a future RBMS conference. The Sunshine State Digital Network Metadata Working Group provides a great example of a successful webinar series on the practice of conscious and reparative metadata editing that can provide some inspiration to the BSC.

In order to support BIPOC colleagues who are early in their careers or are students, we recommend that BSC collaborate with the RBMS Scholarships Committee and the Membership and Professional Development Committee (M&PD) to coordinate targeted internships, mentorship, and conference stipend opportunities for BIPOC individuals with interests in cataloging, metadata and technical services within the rare books community. The Scholarships Committee and M&PD have already established outreach initiatives toward which the BSC could contribute. We also recommend that BSC consider collaborating with the ALA Spectrum, the ARL Kaleidoscope, and the ARL/SAA Mosaic programs to co-organize a webinar series, or a virtual discussion series on metadata remediation and eliminating bias in current cataloging practices. These programs have established internship and mentorship programs in which the BSC members and their respective institutions can participate.

## Next Steps

The above recommendations are far-reaching and deeply intertwined with existing BSC activities and should not be a siloed project. This task group's research has confirmed a great need to address the historical and divisive biases that shaped the library and information field, especially in the non-neutral framework of descriptive standards used in the creation and management of metadata. To that end, BSC should provide leadership to further identify, provide support, and develop strategies to address the special collections community's DEI needs and efforts by charging a new task group.

We recommend that the new task group's charge include exploring the feasibility of centralizing the output of these efforts on the BSC website, possibly developed as a DEI toolkit. This hub could link out to individual efforts that may be directly integrated into existing and future BSC-issued resources where appropriate (such as guidance in introductory sections of DCRM standards or RBMS Controlled Vocabularies, creating a DEI section in the Web Resources portal or a DEI category in the BSC Rare Materials Catalogers Directory).

We further recommend that the new task group's membership be drawn from various RBMS communities including BSC and broader special collections community, along with liaisons from relevant groups such as SAA, RBMS Diversity Committee, PCC, etc. We encourage attention to reducing barriers to participation in these efforts, for example, by preferring virtual or asynchronous work to in-person conference meetings.