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Catalogue and Index

Periodical of the Metadata & Discovery Group,
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Editorial

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Welcome to C&I 202,

We have another bumper issue for you, as we explore the challenges and intricacies of creating, working with, and fighting to change subject headings and controlled vocabularies.

Firstly, though, we include the letter sent by the MDG committee in support of our Chair, Dr Diane Pennington, to her MP Alison Thewliss, urging her to fight against Diane's deportation.

Opening the thematic papers, Karen Snow offers a defence of subject cataloguing in LIS education, and some insights into what teaching LCSH specifically can be like. Further arguments for controlled vocabularies are given by Preston Salisbury and Joy DuBose, who also look at specific examples of why vocabularies need to be constantly evolving, and examine why they may frequently fail to do so.

Janet Ashton and Caroline Kent then provide an update on the adoption of FAST headings by the British Library, and we see how the more intuitive format of the scheme, when compared with LCSH, has allowed its application as part of a number of projects working across the library's collections.

The next two papers present initiatives aiming to tackle the ethical challenges of using controlled vocabularies. Jennie-Claire Crate describes her involvement in the international Subject Headings Working Group that contributed towards the important Code of Ethics for Cataloguers, unveiled in January this year. Then Laura Daniels, Jacqueline Magagnosc, and Margaret Nichols relate how a screening of "Change the Subject" led to the forming of a Critical Cataloging Working Group at Cornell University Library, and how they have worked towards removing harmful and offensive terms from their catalogue.

CILIP SPECIAL INTEREST GROUP

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Next we focus on two subjects in detail. Rebecca Waldorf and Jonathan Furner explore sizeist bias in LCSH, and provide solutions for addressing it. Paula Jeannet then addresses the sensitive issue of representing racial identity in archival metadata for collections of photographs, illustrated by a fantastic selection of images from the holdings of the David M. Rubenstein Rare Book & Manuscript Library at Duke University.

Rounding off the themed articles for this issue, we present papers on two specialist controlled vocabularies. The Board of the Homosaurus International LGBTQ Linked Data Vocabulary give us an overview of how the Homosaurus works, and explain why a thesaurus of queer subjects is needed to supplement larger schemes such as LCSH. Then Bina Vaidya and Gita Thapa describe the need to provide a standardised scheme of Nepali subjects, and their efforts to bring such a work into being.

We finish as usual with book reviews, in this issue provided by Anne Welsh and Karen Pierce. We'd like to take this opportunity to extend huge thanks to Karen, who has stepped down as co-editor, for her work on C&I over the last six years, recognised in her being awarded the Alan Jeffreys award last year. Her place has been taken from this issue by Martin Kellher, Metadata Manager at the University of Liverpool, but we expect to see more articles from Karen in issues to come!

Enjoy!

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Dear Ms Thewliss,

We write to you as committee members of the Metadata and Discovery Group, a Special Interest Group of CILIP, the UK's Library and Information Association, concerning the impending deportation of our Chair, Doctor Diane Rasmussen Pennington.

As described in our Mission Statement, our aim is to be the keystone organisation in the UK for those who create, disseminate, enrich and maintain metadata to facilitate discovery and access to knowledge, information or data. Amongst other things, we engage with the development of metadata standards, work with regional groups to provide training, host a biennial conference, publish a quarterly online open access journal (*Catalogue and Index*), and work to ensure that resource description is progressive and ethical.

In 2020, Diane's expertise and leadership ability led to her unanimous election as Chair of our committee.

Education in cataloguing and metadata is increasingly rare even in dedicated librarianship courses, yet the need to understand the technical and conceptual underpinnings of the increasingly complex information landscape is more pressing than ever. Diane is one of the few academics in the UK with the skill and knowledge to deliver this essential training to the next generation of information specialists.

Quite apart from the devastating impact that her absence would clearly have upon her students, and more broadly upon the metadata education landscape in the UK, we can attest that her loss would directly affect our professional body's ability to deliver leadership and facilitate training in a vital and fundamental aspect of librarianship.

We urge you to fight her deportation as both a gross injustice and a huge blow to librarianship across the UK.

Of ouija boards and teaching Library of Congress Subject Headings

Karen Snow, Associate Professor & Ph.D. Program Director, School of Information Studies, Dominican University

Teaching subject cataloging generally, and Library of Congress Subject Headings (LCSH) specifically, is both exciting and exasperating at once. Despite the rigidness of controlled vocabularies, at times the subject analysis process itself is, for lack of better words, squishy and idiosyncratic, especially when faced with describing resources that defy easy categorization. In his seminal work *The Subject in the Dictionary Catalog from Cutter to the Present*, Francis Miksa admitted his discomfort and frustration teaching subject cataloging, stating "More than once I have found myself apologizing to students for the topic as if it were akin to using an ouija board" (F. Miksa, 1983, p. xi). I am sympathetic to his plight. When I shift from teaching descriptive to subject cataloging in my classes, I, too, find coaxing what can be an enigmatic process into concrete terms to be a delicate balancing act. However, hands-on practice does help make abstract discussions of determining "about-ness" become more concrete.

The Importance of Teaching Controlled Vocabularies

Despite the existential challenges of teaching subject cataloging, it is critical that all library and information science (LIS) students are exposed to it and, in particular, the importance of controlled vocabularies such as LCSH, regardless of their LIS career path. Gross and Taylor (2005), and their follow-up study Gross, Taylor, and Joudrey (2015), argued convincingly that despite greater reliance of keyword searching in catalogs, the inclusion of controlled vocabularies has a positive impact on catalog search results. The latter study found that "an average of 27% of hits would be lost if the subject headings were not present in the records" (Gross, Taylor, & Joudrey, 2015, p. 31). In other words, even if users do not intend to utilize controlled vocabularies, they benefit from the presence of controlled vocabularies nonetheless. Therefore, it is important for all LIS students to have an understanding of subject cataloging and controlled vocabularies, and the ways in which this knowledge can make browsing and searching the catalog more effective.

Anecdotally, it is clear that most LIS students do not enter an LIS program of study with this knowledge and experience. I cannot begin to count the number of times students have commented during the LCSH unit of my introductory cataloging course that they had no idea that subject searching using controlled vocabularies was even an option, much less an effective search strategy. Library of Congress reference librarian Thomas Mann, an LCSH evangelist, argues that "Teaching library research without LCSH is like teaching medicine without anatomy" (Mann, 2000, p. 118). But even Mann admitted that he never heard of LCSH prior to attending library school: "When I had my first cataloging class in library school, I was simply astonished that such an amazing system for categorizing books had been there all along, and that I had gone through so many years of using libraries without anyone at all telling me about it" (Mann, 2000, p. 118). Fellow cataloging educator, Shawne Miksa (daughter of Francis), noted the same trend in her classes, and additionally was surprised when she found out that a student continued to use unstructured keyword searching when helping library patrons despite the student's knowledge of structured subject searching using controlled vocabularies (S. Miksa, 2008). Keyword searching is a hard habit to break, I suppose.

Teaching Cataloging Ethics Using LCSH

Teaching LCSH also reveals ethical dimensions to cataloging that are not as obvious when discussing descriptive cataloging standards such as *Resource Description & Access* (RDA) (though there are certainly ethical issues in descriptive cataloging, I assure you). I have no doubt that cataloging educators, past and present, discuss the ethical implications of subject cataloging work in their classes. However, very little about ethics in subject cataloging has been mentioned in the cataloging education literature, which focuses primarily upon why cataloging courses are important (and how many are still offered), standards and concepts taught, and effective pedagogical approaches. My recent work with the Cataloging Ethics Steering Committee to create the *Cataloguing Code of Ethics* (https://sites.google.com/view/cataloging-ethics/home) has reinforced my belief that subject cataloging, especially controlled vocabularies such as LCSH, must be taught using an ethical lens. Cataloging educators must emphasize that standards are created by humans who are fallible and have conscious and unconscious biases - there is no such thing as a "perfect" subject heading list that everyone can happily agree upon. I have found that students, both novice and advanced, struggle very little with this ambiguity and, in fact, relish opportunities to connect their studies to social justice issues. They enthusiastically engage in discussions about problematic subject headings and the challenges associated with respectfully representing historically marginalized communities (such as the recent controversy surrounding the LCSH *Illegal aliens*).

I try to impress upon my students that they do not have to be passive participants in the library world when they encounter cataloging standards or situations that are ethically problematic. In my advanced cataloging class, for example, students can choose as their final assignment to submit a proposal to the Library of Congress to create or modify an existing LCSH. I have them do this through the *Cataloging Lab* website (https://catalogінglab.org/) so they benefit from the wisdom and expertise of those more seasoned in submitting proposals. Students not only learn a lot about the subject heading proposal process itself, but they may also leave a lasting mark on LCSH if their proposal is approved.

I find teaching LCSH to be rewarding, not despite the challenges it presents, but because of them. Lurking beneath the appearance of well-considered rules and orderly controlled vocabulary lists are questions that often defy simple answers. That is what makes cataloging intellectually stimulating and fun. Now, where did I put that ouija board?

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Controlled vocabulary and authorities: problems everywhere

Preston Salisbury and Joy DuBose, Mississippi State University

Subject authority control is an essential part of everyday cataloging. Though most catalogers may not be aware of it, it goes on behind the scenes so that subject headings are accurate and precise. It does this through the use of a controlled vocabulary. Controlled vocabularies have advantages and disadvantages. Using a controlled vocabulary can improve access to items if users are aware of the controlled vocabulary and of the terms used within that controlled vocabulary. Unfortunately, this also requires controlled vocabularies to adjust with their user base as needed; to update terms as users use different terms.

The Library of Congress Subject Headings (LCSH) may be the most used controlled vocabulary within the library world. While developed at and for the collection of the Library of the Congress of the United States of America, they are used throughout the English-speaking world, and even influence the development of controlled vocabularies for other languages, such as their use in an adapted form by the National Library of Latvia (Stūrmane, Eglīte, and Jankevica-Balode, 2014, 21). However, the use of LCSH in a variety of areas with varying populations serves to increase some of the problems with a controlled vocabulary. For example, the subject heading for the indigenous peoples of the United States and Canada remains “Indians of North America” although it is widely recognized that “Indians” is not a proper term for this population. However, given that there are different accepted terms in the United States and in Canada (“Native Americans” and “First Nations”, respectively) the solution is not as simple as changing the subject heading to a frequently used term. Further problems have come to light during the Covid-19 pandemic. Here we examine some of the problems caused by subject controlled vocabularies, libraries not having controlled vocabularies, the lack of cataloging training, and the lack of understanding with authorities in general.

The Covid-19 pandemic has brought other controlled vocabulary problems to light. This can be seen clearly in the terms “epidemic” and “pandemic”. These terms do not have the same meaning - pandemics are intended to represent a larger geographical spread than epidemics, which may occur in a single city. It is also true that both terms entered English at roughly the same time. There has never been a Library of Congress Subject Heading for “Pandemics” however; only for “Epidemics”. This was fine as long as searchers were primarily using the “epidemic” as their term of choice. However, while usage of epidemic and pandemic on Google searches is relatively equivalent during normal times, searches for “pandemic” have been on the rise, particularly in times of epidemics or pandemics. In 2005, at the time of the SARS outbreak, searches for “pandemic” were double searches for “epidemic”. In 2009, at the time of the H1N1 (Swine Flu) pandemic, searches for “pandemic” exceeded “epidemic” by three or four to one. March of 2020 found these search teams more used than any other time since Google Trends began collecting information in 2004, but at the peak of both terms, “pandemic” was being used almost five times as much as “epidemic”, and it has proved to have staying power, now outstripping “epidemic” by a ten-to-one margin. In adding a cross-reference for “pandemics” to the subject authority record and adding a subject heading for Covid-19 , the Library of Congress did somewhat address this problem. However, the cross-reference will only work if libraries keep their authority records up to date. Furthermore, they have not updated other headings containing “epidemics” in the same way; “Epidemics in literature” still has no similar cross-reference.

However, controlled vocabulary problems and changes are not the only difficulties in dealing with subject headings. Another problem is the overall lack of training of catalogers. Fewer librarians are going into the cataloging field. That means that many times public, small, and rural libraries may have to depend on those that are less trained, or not trained at all, for their cataloging needs.

One example of this is a library system that is part of the Mississippi Library Partnership consortia. This system had a trained cataloger who trained a replacement and then retired. The replacement trained a replacement and then left. This second-generation replacement is now in charge of training other catalogers of the branch. As one can imagine, a great deal of information was lost during this process. Besides leading to general cataloging problems, the system has a small batch of local history books that require original cataloging. Original cataloging can be difficult for trained catalogers, much less those that are new to the field. To help with the problem, the consortium is now developing and providing training for these catalogers. One area focuses on subject headings, what they are and what are they used for. This is due to the fact one of the trainees mentioned she did not understand subject headings or how to create one. While this training does not take the place of a cataloging class, it is hoped that this will allow these catalogers to catalog more efficiently with fewer problems. In this instance there was a consortium available to provide training, and experienced catalogers to provide help. However, what about a library system that does not have these securities?

Some smaller libraries, which frequently serve marginalized populations, might find themselves even more marginalized by LCSH. This is not the fault of the marginalized library or the Library of Congress, but it remains an unfortunate side effect of existing systems. Updating subject headings either by changing the approved term or by adding a cross-reference requires an update of the authority record. While several vendors offer the service of updating authority records, this still requires some effort on the part of the local librarian. It also requires paying for a service that will be difficult to justify to a library board that might have little-to-no idea of what an authority record does. When dealing with shrinking budgets, it is hard to make the case that funds be re-directed from purchasing materials to an added feature which makes those materials more discoverable by patrons. By making sure items are found more easily, patrons will be happier, and staff will be able to serve their patrons better.

However, a general lack of authority understanding can also cause a great deal of problems. If a library system is not familiar with, or unaware of, authorities, they may not load them into their online catalog. In that case there are no authorities for subject headings, names, etc. to match up to. Catalogers who are unaware of authoritative names for subjects may instead use more common names and keywords. Some examples of this can be found in the world wars. The authoritative name for World War 2 is “World War, 1939-1945”. If the authorities are loaded in a library system’s catalog, both the authoritative and the common name can be searched and found. However, if they are not, then catalogers may not know to use “World War, 1939-1945”. Instead, there could be a mixture of World War 2, World War II, and the Second World War, among others. None of these would be linked to each other and could cause patron confusion and for some materials to be lost. Another example is World War 1. The authoritative name also has dates, “World War, 1914-1918”. Without proper authority files, there could be a mixture of subject headings that, instead of helping patrons find materials, confuse them instead.

To help alleviate these issues, librarians throughout the world that use LCSH need to increase their participation in the controlled vocabulary process, while at the same time keeping in mind that there will not be a single solution to these problems. Increased collaboration (such as the partnership between Mississippi State University and other libraries in the state) can help keep the authority records up to date as well as providing more training on the purpose of authority records. Perhaps the greatest help to librarians is to insist that the decision makers take into account the needs faced by the majority of libraries. All libraries face needs in the lack of money, time, and personnel. Changes within the cataloging world, while well-intentioned, serve to increase the gap between the libraries that have more and those that do not. Libraries that are more provided for are more likely to invest in an extra layer of discoverability that includes more features. This means that controlled vocabularies may play a greater role in discoverability in more deprived libraries. It is imperative that poorer libraries are given a seat at the table in maintaining the vocabulary.

The Subject Authority Cooperative Program (SACO) was created to allow libraries to help with LCSH. Participating in the SACO program does allow for libraries to suggest changes, and the existence of e-mail lists allows librarians that do not participate in such programs to communicate with those who do and suggest changes. However, the reality is that submitting proposals to change subject headings is time-consuming and cannot be high on the priority list for many librarians, particularly in the middle of a global pandemic. This is both a positive and a negative. If it is too easy to add to and change a controlled vocabulary, the purpose of a controlled vocabulary is lost. Still, the purpose of cataloging in general, and controlled vocabularies in particular, is to improve access. If these vocabularies are instead inhibiting access, there is a definite problem. A problem which exists even when setting aside the existence of subject headings which might marginalize certain populations.

While some progress is being made there are still more problems. These observations do not cover all of the potential problems in subject authority control and the application of that control to the patron search project. However, a few observations and recommendations for future study and application can be made. Education on search strategies (both for patrons and for library staff) remains of paramount importance. Collaboration is key: smaller libraries frequently lack the time and personnel to maintain their authority files. Collaboration with a larger library can help with this and ensure that records remain up-to-date. Custom vocabularies are useful, but in developing these it is important to bring all voices to the table. This includes the voices generally overlooked in development (i.e., people of color, women, and the socioeconomically disadvantaged). Doing these things will enable controlled vocabularies, including LCSH, to serve patrons going forward.

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FAST and the British Library: where we are now

Janet Ashton and Caroline Kent, British Library

Since 2015, the British Library (BL) has been using the Faceted Application of Subject Terminology (FAST) in parts of its catalogues, as a supplement to Library of Congress Subject Headings (LCSH) and to older subject schemes used over the years by the Library and its predecessor organisations. In our 2017 article for *Cataloging and Classification Quarterly*, "New approaches to subject indexing in the British Library", we outlined the Library's reasons for choosing FAST and detailed the work done so far to assess its effectiveness and its reception by our catalogue's users. This new article will update you on developments since, including on FAST's role in the lockdowns and emergency measures of the last year.

At the time of the last article, we had recently surveyed users on their views of the benefits and limitations of the scheme. Their views reflected those of our own staff who had been trialling FAST: it was simple to learn and apply, and of course free to access, offering distinct advantages over more complicated schemes such as LCSH in terms of efficiency and economics. The addition of the genre/form facet was especially appreciated. Conversely, there were concerns about sustainability as long as it remained a Beta product for OCLC, and some worries over potential loss of precision, and the impact on the user Search experience this might have.

From here, we took a view of how to move forward, based on the preceding responses from cataloguers and British Library stakeholders, and our own internal deliberations.

Governing and sustaining: the FAST Policy and Outreach Committee

To address the issue of future governance and sustainability, we sought assurances from OCLC about continuing support of the system, including timely updates to the scheme. For example, where headings are added to the Library of Congress's Name Authority File (USNAF/NACO), or are updated or changed, we sought to be sure that these changes would feed through to FAST as soon as possible, to avoid adding erroneous terms to our indexes, and to avoid having to double-check on NACO itself. The same applied to LCSH changes: we needed to be sure that FAST would reflect these as soon as possible, since it is based on the full LCSH vocabulary, if not the structure. Feedback from the broader community supported the BL view that an OCLC commitment to the ongoing support and development of FAST into a product was essential for us to consider the possibility that FAST might replace LCSH in all of our workflows.

To support any such a commitment by OCLC, the library community including the BL wanted to contribute actively to FAST, for example through making proposals for new or changed terminology, and hoped to review or contribute to the scheme developments and principles and to training and related documentation. The BL made it clear that it was willing to work with OCLC and other prospective implementers, to develop these schemes and materials. To that end, the FAST Policy and Outreach Committee (FPOC) was established by OCLC and interested libraries and organisations in 2018 to guide the future of the scheme. The current BL representative and Committee co-chair is Alan Danskin, Collection Metadata Standards Manager. The Committee meets monthly, usually by videoconference, though there have also been meetings at conferences and at the Library of Congress, attended also by other interested parties where necessary. It is currently seeking to expand with a view to broadening experience and application of FAST, by asking for new volunteers.

Using FAST on British Library printed monographs

While development work is ongoing with external collaboration, use of FAST continues to expand within the British Library. It is more important than ever as a tool in both routine and project work, across all manner of material. From the beginning of the project, it has been policy to exclude all legal deposit printed monographs from FAST application in the BL, due to the Library's own contractual commitments to its users and partners, though this is slowly changing as the users and partners themselves become more familiar with the scheme and more aware of the measures put in place by the Library to mitigate concerns. Although the Library does not formally add FAST to legal deposit printed monographs users will already see it on some of these records in addition to LCSH. This is because many records on the Library catalogue are derived from other sources, and in some cases, for example records from OCLC, libraries add terms from both standards, and OCLC itself batch converts LCSH to FAST headings and adds them as well if they are not already present. This will affect largely but not exclusively books which are also published in the United States. The first staff to use FAST regularly at the Library were full-time, experienced cataloguers with years of experience of LCSH. FAST was used in the Digital Content cataloguing team, and on mainstream printed monographs published in European languages.

The FAST training and application for printed language materials was undertaken specifically as a trial and the exact languages covered depended on the skills of individual cataloguers taking part. Thus in the printed collections you will find FAST headings in the BL catalogue on books in Norwegian, Swedish, Danish, French, German, and several Hispanic and South Slav languages. The observations and questions of experienced cataloguers, some of whom have now moved into management roles with the possibility of taking their skills and advocacy for FAST to a wider audience, proved invaluable and informed everything we have done since. The aim is for FAST training to expand, and this has recently expanded more quickly than originally hoped, in a serendipitous opportunity afforded by remote cataloguing processes established to support working from home in the 2020 and 2021 public lockdown periods.

Uses of FAST in other BL collections

From the beginning, project leaders were particularly aware of the potential of FAST where serial publications are concerned. As these are subject indexed at the serial rather than issue level, analysis does not require the granularity of most monographs, and the risk of losing precision is much smaller. This, and the fact that FAST contains the extremely useful "Periodicals" form heading, suggested that a switch to FAST would be beneficial. Electronic serial titles therefore comprised one of the strands indexed alongside purchased monographs in the first phase of the project, and use soon expanded to include other types of serial or serial-like publication. The Library implemented FAST early on in an electronic social science database of titles, many of which are serials or series, where the indexers work from a simple set list of subject and genre terms pre-agreed with the Collection Management staff leading the project. Whilst not all staff were experienced cataloguers, they were able to use specialist knowledge for subject analysis, without the need for extensive and complex training in the scheme chosen, instead focusing on their knowledge and then applying a quick but effective set of pre-chosen terms from FAST. One significant benefit of this approach is the use of a consistent vocabulary in the catalogue.

Making similar use of specialist knowledge, in one of the largest and most significant of its uses to date, FAST was also adopted early on as the preferred subject scheme for cataloguing interns and cataloguing staff on short term contracts, with limited time allocated for training. This involved subject experts in projects that create records for older, backlogged material which had never been catalogued due to lack of resources. This material is purchased or donated, and belongs to sections of the Library with an international focus, for example south-east Asian collections. The participants create records by filling in specially designed spreadsheets from which data are transformed to MARC21 and loaded to the main catalogue. The spreadsheets are designed using simple element sets rather than full MARC21. In general participants had no familiarity with LCSH, but found FAST to be intuitive and felt confident with its use quickly. A significant benefit for time limited projects and backlog reduction is that training for short-term staff can concentrate on the principles of subject analysis, without the need for extensive scheme training and complex strings and subject heading arrays. This use is still very much ongoing, and has become a permanent strategy for such material. Subject experts do tend to find that precise terms for their specialisms can be missing – for example, FAST lacks terms for smaller literatures or for famous individuals pertaining to the history and culture of countries less familiar to the Anglosphere – but this is an issue it shares with LCSH and other schemes. We get around this by using "place holder" entries for people or concepts not yet in the file, particularly in instances where a pattern can be copied, as in literary form headings. If this approach isn't possible, for example in dealing with a completely new concept, cataloguers are asked to use broader terms instead.

FAST and authority control

Although there is not yet a mechanism by which cataloguers can directly contribute new headings to FAST, it is still possible to send these through SACO and NACO and await their transfer to FAST. Where new personal or corporate names are concerned, for example, this process is relatively straightforward for NACO contributors: an authority cataloguer candidates the name, and, assuming it is accepted, it appears on the Library of Congress's Name Authority list, and then, in due course, on FAST. SACO LCSH proposals take considerably longer from submission to acceptance, but there is still the possibility of putting such proposals through in order to ensure the transfer of a similar concept to FAST. The British Library has not established any formal workflow to allow all FAST cataloguers to submit proposals as this would be too much of an overhead on the very small number of people who are familiar with SACO, NACO and FAST, but those who are NACO-trained are able to submit headings as needed in their own work, just as they would when working on descriptive cataloguing or using LCSH.

OCLC's website also now features a portal through which cataloguers can submit the system numbers and details of LCSH and NACO headings which are not yet on FAST, in order to speed up the process of transferring them for use. In the summer of 2019, the single BL FAST cataloguer who is also both SACO and NACO trained spent time experimenting with this portal, and had some success despite initial teething problems on the technical side which were resolved by personal discussion with OCLC development staff. This portal provides a slightly clunky but reasonably useful interim measure, pending a mechanism for larger-scale contributions by institutions such as the British Library.

FAST becomes Business-as-usual

In 2018, managers agreed that mainstream, permanent cataloguers who work on the legal deposit collection of electronic grey literature would begin to apply FAST to their records. This is in part an efficiency measure, since a huge number of these items are received by the Library. Their content is significant, but their format has in the past meant the material, seen as more ephemeral than published legal deposit books, either printed or electronic, has not received the same focus as mainstream published legal deposit (LD) content. However, with the current aim of one hundred percent subject coverage across the collections, increasingly blurred distinctions in terms of format and publishing boundaries, and minimising diverse approaches to metadata creation in the Library where possible, FAST was seen as a solution. Further, this collection area does not have the same need for external discussion with the Library's partners as would have been the case had we adopted it on mainstream LD monographs. A number of cataloguers received training to do this in the first instance, and the training was later given to others in order to expand the pool of staff able to work on indexing this significant collection.

Not long after the training of the second group, the Library entered COVID-19 lockdown. This came suddenly, and meant of course that many cataloguing staff accustomed to working on printed items that cannot leave the Library's sites found themselves without their usual work to do. The department quickly identified a number of projects to occupy them and make use of their skills, including by expanding the group working on grey literature still further. This entailed adapting the training slides and exercises so they could teach themselves FAST at home without a tutor, emailing any queries they might have before embarking on using it.

FAST was also adopted as the standard to be used on the records for nineteenth century books digitised by Microsoft. Cataloguers amend these records through an electronic portal known as Zooniverse, adding subject and other relevant data by consulting the digitised copy. This has been an important strand of work for people unable to access print materials, and will provide remote access to very large swathes of the Library's legacy collections.

A possible legacy of this expansion of FAST will be that more cataloguers come to use it on purchased monographs in the future, with one cataloguer already doing so, finding it a more comfortable and intuitive system than LCSH.

There have also been a number of other projects that have used FAST in lockdown, with or without direct cataloguer involvement. A notable one was FAST-en, which matches parts of British Museum shelfmarks to FAST headings and assigns the latter to the historic catalogue record. This is a partial compensation for the fact that the old British Museum subject headings were not digitised and added to the records since many terms in use in this old scheme are today considered unacceptable. While FAST itself uses some vocabulary that does not translate well outside a US context the matching of terms has been done by present-day cataloguers who do their best to circumvent these and take account of sensitivities in ways impossible when dealing with the decisions made long ago in nineteenth century cataloguing.

Smaller scale use of FAST has involved language cataloguers identifying older items in a language they know on a particular theme within the collections and assigning FAST to these. Themes have included Travel, Descartes and other topics, and the objective as ever is to expand subject coverage in areas where there was none before.

Talks are also ongoing about the ways in which FAST can be used to assign management information to purchasing decisions for collection analysis purposes. This could take the form of selectors choosing headings at item level, or – possibly more likely – of acquisition staff assigning a pre-determined heading or headings to entire collections as they ordered them. Subject areas which might appropriately receive such treatment could be works on aspects of library and information studies, history of science, or black history, and any headings would clearly be at a broader and more general level than the granular ones assigned in cataloguing.

FAST and external collaborations

For several years, the British Library has been offering the opportunity for training in a number of standards to groups of cataloguers and other librarians from institutions wishing to pay for this. The training arose as a response to gaps in provision of RDA, LCSH and Dewey courses nationally – and also internationally, as one group of staff who requested RDA training were librarians working for EU institutions.

Following a request from external archive staff, this training has been expanded in 2020 to include a tailored FAST course that comprises a self-guided module in subject analysis, followed by a taught session on using the standard itself. This is delivered through Zoom, and feedback has been very positive. This Zoom-based course has now also been used for British Library staff, and can be adapted as needed with examples to suit other external organisations and institutions. FAST also forms a case study in a draft course about subject analysis in general, which – like the tailored course – takes cataloguers through a process that starts with the principles of analysis and moves on from this to try practical examples of translating analysis into headings and assigning them to specific real-world items using a chosen standard.

We are also now starting to discuss FAST as part of our wider bibliographic partnerships.

Conclusions and the future

The British Library has now been experimenting with FAST for more than five years. In these years, its use has expanded continually to encompass many varied strands of current and retrospective cataloguing and collection analysis, and has received particular attention due to the COVID-19 lockdowns and staff absence from site. Exciting international projects are addressing issues that originally worried both staff and users, and we have worked hard to reassure stakeholders of FAST's value as a discovery tool, and impart practical knowledge of the scheme.

At this point, with enquiries and interest increasing by the day both inside and outside the Library, we confidently anticipate further expansion in regular workflows and in many retrospective and enhancement projects, as well as further developments in internal and external training, and other potential collaborations to come.

Further reading

OCLC's FAST site: https://fast.oclc.org/

Ashton, Janet and Caroline Kent: New approaches to subject indexing in the British Library: https://www.tandfonline.com/doi/full/10.1080/01639374.2017.1354345

Danskin, Alan. FAST Forward? Sustaining and extending subject indexing at the British Library: https://cdn.ymaws.com/www.cilip.org.uk/resource/collection/32B46020-D067-4D33-99A7-4FE34BCDC01A/catalogue_and_index_issue_192_september_2018_danskin_fast_forward.pdf

FAST Policy and Outreach Committee Regulations: https://www.oclc.org/content/dam/oclc/fast/fast-policy-and-outreach-committee-regulations.pdf

Collaborative working across the Atlantic – participating in the Subject Headings Working Group of the Cataloguing Code of Ethics

Jennie-Claire Crate, Senior Library Assistant - Digital Curation & Metadata, University of Kent

The Cataloguing Code of Ethics[1] was published in January 2021 and represents the culmination of a year of work by a steering committee and six working groups to respond to a need for a set of ethical principles and guidance on professional ethics for metadata workers. This article reflects on my experience as a member of one of the six working groups and explores the group's methodology and output as well as the next steps planned to incorporate the Code of Ethics into metadata processes at the University of Kent.

In April 2019, a call for volunteers to participate in an international, collaborative piece of work on ethical considerations in cataloguing was circulated via the JISCMail CILIP CIG mailing list. I had recently returned to metadata work from a long career break and wanted to get back into some sort of committee activity to help me get back up to speed with current thinking in cataloguing and to meet other cataloguers. I also wanted to extend the work to address bias in reading lists at the University of Kent that had recently been undertaken by library colleagues.[2] I had been examining instances of description and classification in our library catalogue that were outdated, and potentially offensive and harmful to our users, but wanted to be able to address these issues with professional confidence and in a way that was going to be sustainable. The call for participants in a set of six working groups investigating the ethical implications of metadata work interested me as it presented a new way of working and sharing thoughts and best practice with colleagues not just outside my own institution, but outside the UK. Applying to join one of the groups online was straightforward and in mid-June I found out that I had been assigned to the working group looking into the application of subject headings and controlled vocabularies.

The need for a code of ethics specifically for cataloguers had been discussed at the Cataloging and Metadata Management Section (CaMMS) Forums at American Library Association (ALA) Midwinter Conference in 2016. Professional codes of ethics for librarians already existed, including those published by IFLA,[3] the ALA,[4] and CILIP's Ethical Framework,[5] but none of these specifically addressed the ethical responsibilities encountered by cataloguers when describing and classifying library stock. CaMMS formed the Cataloguing Ethics Steering Committee in 2016, and invited participants from CaMMS, CILIP's Metadata and Discovery Group (MDG) and the Cataloguing and Metadata Standards Committee of the Canadian Federation of Library Association (Fédération canadienne des associations de bibliothèque CFLA-FCAB). Recognising the scale of the task, the six-person Steering Committee then created working groups to investigate specific areas of interest, with their mission statement specifically requesting input from "individuals drawn from diverse geographical, ethnic and library sectors".[6] Starting in August 2019, cataloguers from the UK worked alongside metadata workers from Canada and the United States to produce a report on their area of focus, including a literature review and case studies, with the report to be submitted to the Steering Committee in November 2019. The Steering Committee then considered the content of these reports and condensed them into a draft Code of Cataloguing Ethics, which was shared with the cataloguing communities of these three countries for comment. A second draft of the Code of Ethics followed, before the final version was published in January 2021.

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[1] The final version of the Code of Ethics for Cataloguers can be viewed at https://docs.google.com/document/d/1IBz7nXQPfr3U1P6Xiar9cLAkzoNX_P9fq7eHvzfSIZ0/edit (accessed 17/03/21)

[2] https://blogs.kent.ac.uk/staff-student-news/2019/05/10/kent-wins-in-talis-awards-2019-for-diversifying-the-library-collection-with-reading-lists-project/ (accessed 18/03/21)

[3] https://www.ifla.org/faife/professional-codes-of-ethics-for-librarians (accessed 18/03/21)

[4] http://www.ala.org/tools/ethics (accessed 18/03/21)

[5] https://www.cilip.org.uk/general/custom.asp?page=ethics (accessed 18/03/21)

[6] The mission statement can be read on the Cataloging Ethics Steering Committee website: https://sites.google.com/view/cataloging-ethics/home (accessed 17/03/21)

The Subject Headings Working Group that I joined was made up of 16 participants, lead by Timothy Keller of Oberlin College and Conservatory in Ohio. The group was almost exclusively made up of North American participants, with me being the only representative from the UK. The Working Group was also almost entirely female in its membership, but lead by a man, a fact that reflects the gender imbalance and glass ceiling within the profession at large.[7] We began by creating a bibliography of relevant books, journal articles and blog posts which we used as the basis for our literature review. This was done by splitting the large topic of subject headings into smaller areas for review - my subgroup looking at the creation of local subject headings; creating ethical vocabularies; the Library of Congress subject headings change procedure; and metadata we surface but cannot control (such as vendor-supplied metadata in discovery layers). Working over Zoom worked well for the group, and meetings were scheduled fortnightly at 7pm BST so that all had the opportunity to attend. It doesn't seem so exciting to be working remotely via video calls in our post-2020 world, but at the time it felt genuinely revolutionary to me! All the working groups were assigned a member of the Steering Committee as liaison, so that we had a point of contact for any queries that came up, but the information the committee had given on the working group deliverables was sufficiently detailed that we didn't need to trouble them for extra information very often. Collaborative editing of documents was carried out in Google Drive, with separate folders for each Working Group, and this generally worked well with the group setting up Google hangouts for midweek editing sessions. We quickly laid out a plan for our report using the template provided by the steering committee and began to make individual contributions as well as giving our comments on the contributions of others.

Our final report, including a literature review, methodology, case studies and bibliography, was submitted to the Steering Committee in November 2019. The original plan was for the Steering Committee to read the reports from the six Working Groups and use them to create a draft document by around March 2020. This timeline was, of course, derailed by the outbreak of COVID-19, which pushed the delivery date of the final version of the Code of Ethics for Cataloguers back by six months to January this year.

Since the publication of the Code of Ethics for Cataloguers and its presentation at a series of webinars in Canada, the UK, and the USA, I have had time to reflect on my experience as part of a Working Group and the document we helped to create. Meeting with metadata professionals from outside the UK was a great way to gain insight into metadata working practices outside the UK Higher Education echo chamber and has definitely broadened my own practice as a cataloguer. I feel more confident to attend webinars and training sessions offered by institutions such as IFLA and ALA Core now that I know where our working practices are similar and where they diverge from one another.

The reports produced by the working groups were substantial documents in their own right, concentrating on very specific areas of ethical concern. Alongside the final Code of Ethics for Cataloguers it would be beneficial to the metadata community to make some of the content of these documents more widely available. Understandably, case studies submitted to these reports may not be suitable for sharing widely (in fact the Steering Committee is currently seeking case studies to support the principles of the Code of Ethics),[8] but the expertise and recommendations in specific areas of ethical interest would be useful to the broader profession. Additionally, the need to distil these large reports into a much smaller final document means that a lot of the fine detail on each area has been necessarily missed.

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[7] Hall, Hazel et al (2015) *A study of the UK information workforce. Mapping the Library, Archives, Records, Information Management and Knowledge Management and related professions in the United Kingdom.* CILIP/ARA.

[8] Call for case studies https://sites.google.com/view/cataloging-ethics/home/case-studies?authuser=0 (accessed 17/03/21)

The Working Groups were made of volunteers that expressed an interest in creating the Code of Ethics, and in that regard we were a self-selecting group, creating a bubble of like-minded people working together. This meant that there were few differences of opinion within the group, avoiding friction and enabling fast working but also potentially omitting dissenting voices. The composition of the Working Groups reflected the inequalities and demographic biases inherent in the library profession at large, being overwhelmingly made up of women. It was also exclusively made up of cataloguers working in North America and the UK, missing the opportunity to include the opinions of some of the groups we were considering. This was, of course, due to the collaborative working between the three national metadata special interest groups, but perhaps when the time comes to revisit the Code of Ethics for Cataloguers it would be worth considering how much value could be added if it were created by a more diverse and truly inclusive group of people.

The ten principles laid out in the Code of Ethics for Cataloguers will certainly present challenges for those that do not consider cataloguing to be an inherently 'political' or non-neutral act, in which it is important to consider not just our own biases but those of our library standards too. Following on from work to 'decolonise' reading lists at the University of Kent, the Metadata & Digital Curation team felt the next logical step was to examine how we describe those resources. With metadata labour largely invisible to our end-users, we wanted to think about how the way we describe our collections influences not just discoverability, but how our users feel about us as an institution. To this end, the team has been working on a set of guidelines for metadata staff called "Ethical cataloguing of marginalised voices" which makes clear statements about how we understand our role as the creators and curators of the library's metadata, and gives clear guidance on the practicalities of incorporating inherently biased standards such as Library of Congress Classification and Library of Congress Name and Subject Headings into our metadata whilst ensuring our descriptions are inclusive of, and respectful to, all. It is clear that the Code of Ethics for Cataloguers is a valuable document for the metadata community, providing a great starting point for conversations with library management on how important metadata is in demonstrating our commitment to equality and respect as higher education institutions and the potential for reputational damage if it is not given the serious consideration it deserves.

Making change that matters in the library catalog

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In January 2020, Cornell University Library's Diversity, Inclusion, and Belonging Committee sponsored a library-wide screening of the documentary "Change the Subject," which describes the challenges encountered by students and librarians at Dartmouth College who initiated an attempt to change the Library of Congress Subject Heading (LCSH) terms related to undocumented immigrants. Following this screening, based on input from library staff at Cornell, a task force formed to consider what to do about these specific subject terms in our catalog now, and how we might address other problematic terms in the future.

This paper describes the genesis of the task force, the charge and membership, the issues the task force considered regarding the "Illegal aliens" family of subject headings, and the solution proposed. Against this contextual backdrop, we consider a framework for addressing problematic or contested subject terms, including the criteria by which we will evaluate terms, actions we will consider taking, and how to communicate with our users about subject vocabularies.

Genesis of the Critical Cataloging Working Group, its charge and membership

The Critical Cataloging Working Group charge consisted of two parts. The first was to draft a recommendation to Cornell University Library leadership to address the following terms:

- *Illegal aliens*
- *Illegal alien children*
- *Children of illegal aliens*
- *Illegal aliens in literature*
- *Women illegal aliens*
- *Alien detention centers*
- *Aliens*

The second was to recommend a framework and guidelines for addressing what we called "problematic" subject vocabulary in the future, including whether a permanent group should be formed, what types of terms will or will not be addressed, and what actions will be taken. This recommendation was intended to consider LCSH in traditional catalog records and other vocabularies used in descriptive metadata.

Members of the group included catalogers from the main library, the law library, rare and manuscript collections, archivists, a systems librarian, and a reference librarian.

Issues we considered around the *Illegal aliens* family of subject headings

The presence of the *Illegal aliens* family of subject headings in Cornell's discovery environment is antithetical to the expressed morals and ethics of the Library and the University. As an institution, we take pride in being leaders in scholarship, research, and policy.

The Cornell Values statement outlines our commitment to "diversity and inclusion," affirming that "we strive to be a welcoming, caring, and equitable community." The Values statement defines the Cornell community as a place where "different backgrounds, perspectives, abilities, and experiences can learn, innovate, and work in an environment of respect, and feel empowered to engage in any community conversation".

The taskforce asserted that Cornell Library's continued use of the subject term *Illegal aliens* undermines the University's stated commitment to support undocumented students. It creates an environment where members of the Cornell community feel unwelcome and othered. This jeopardizes the equitable community we strive for and discourages research, scholarship, and discussion. The working group agreed that the terms recommended by the ALA (American Library Association) Subject Analysis Committee in its 2016 report represented the best choice for Cornell.

In the absence of action by the Library of Congress, the group reviewed strategies used by other libraries to present controlled vocabulary alternatives to *Illegal aliens*. These options included adding supplementary headings in the library's MARC (machine-readable cataloging) records, completely replacing the authorized vocabulary in the records, or leveraging the library's discovery layer to present the preferred terms.[1] The staff responsible for managing the Solr Index that provides data to the public catalog verified that this last strategy was realistic, and the committee recommended this solution to library administration, which approved this part of the proposal.[2]

Fortunately, as of January 20, 2021, we are no longer doing this work in opposition to the position of our federal government. In late February, 2021, the Biden Administration proposed the U.S. Citizen Act 2021, which includes specific changes to the legal language used in United States law to refer to non-citizens. This legislation, recently introduced in Congress,[3] specifies replacing the term "alien" with "noncitizen" in the United States Code.

Recommendations and guidelines for managing other problematic or contested subject terms

As a rule, controlled vocabularies lag behind current usage. For LCSH, the process for proposing new or altering current vocabulary terms is inherently conservative. However, in line with the University's stated values, descriptive terminology presented in the public catalog should, whenever possible, not be pejorative in nature.

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[1] American Library Association/ Association for Library Collections and Technical Services/ Cataloging and Metadata Management Section, Subject Analysis Committee, "Report of the SAC Working Group on Alternatives to LCSH 'Illegal aliens'" (2020), https://alair.ala.org/bitstream/handle/11213/14582/SAC20-AC_report_SAC-Working-Group-on-Alternatives-to-LCSH-Illegal-aliens.pdf, p. 5.

[2] The text of our full proposal to the administration is at https://drive.google.com/file/d/1wXBQjLUUD3GKh8h-HgtYtxsgvoZNTT2L/view?usp=sharing

[3] https://www.congress.gov/bill/117th-congress/house-bill/1177

The working group identified criteria for evaluating subject terms. These include:

- *Potential to affect student body*
- *Pervasiveness of term*
- *Demonstrable societal change, making the term inappropriate*
- *Term is rejected by the stakeholders/community to whom it is applied*
- *Term is used to disempower politically or socially*
- *Term is potentially a polemical, rhetorical device (e.g., deliberately confusing)*
- *Term is obfuscating or otherwise confusing, or conflates two or more concepts*
- *Documented historical use of the term in an antagonistic or disempowering manner (precedent)*

These criteria emerged out of multiple discussions and responses to questions such as *who gets to determine what is considered hurtful, disempowering, or denigrating?*

The group agreed that it is best to try to initiate changes to official, global, controlled vocabulary (e.g., LCSH) before making local changes. This strategy, while complicated and slow, benefits the larger library community. Local changes will be considered only if the proposal to change the controlled vocabulary fails. Specifically, the task force suggested the creation of an ad-hoc action team that, for any questioned or contested terminology, "will work with stakeholders (including whoever questioned the term, reference librarians, and other subject experts) to craft and submit a subject heading change proposal to the Library of Congress (or other agency), with the goal of initiating change at the national/international level to benefit the broader community of library users. Priority will be given to controlled vocabulary terms that are actively hurtful or stigmatizing to those described."

Steps to address broader issues - Inclusive Description Task Force

This recommendation for a Cornell Library action team to facilitate LCSH new subject or change proposals addressing problematic or contested language in the catalog has been referred to a newly formed Inclusive Descriptive Practice Task Force (IDPTF). Among other aspects of a broad agenda, this group is charged with establishing a framework for evaluating, acting on, and responding to descriptive terms (e.g., subjects or names) that come to its attention as potentially problematic. Several members of the original task force are now part of this expanded effort. As of January 2021, the IDPTF is refining its charge and working on a definition of inclusive descriptive practice.

As we have found in the process of formulating our definition of inclusive descriptive practice, libraries at a number of institutions have already set the stage for a systematic review of problematic language in the catalog, by making a formal statement to announce their intentions to address this issue and the principles behind their planned response.[4] The Archives for Black Lives in Philadelphia (A4BLiP) has published a highly useful guide to anti-racist archival description, *Anti-Racist Description Resources* (https://archivesforblacklives.files.wordpress.com/2019/10/ardr_final.pdf).

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[4] For example, see Duke University Libraries, Resource Description Department, "Statement on Inclusive Description" (https://wiki.duke.edu/display/DTSP/Statement+on+Inclusive+Description); Special Collections Research Center, Temple University Libraries, "SCRC Statement on Potentially Harmful Language in Archival Description and Cataloging" (https://library.temple.edu/policies/scrc-statement-on-potentially-harmful-language-in-archival-description-and-cataloging); and William Andrews Clark Library, University of California at Los Angeles, "William Andrews Clark Memorial Library Statement on Cataloging," (https://clarklibrary.ucla.edu/research/statementoncataloging/). A more extensive list of such statements is here: http://cataloginglab.org/list-of-statements-on-bias-in-library-and-archives-description/

One of the questions raised by all this good work is *At what level can we best work on this issue?* Will we generate the most creative solutions by working independently at the level of individual institutions, or does that risk generating redundant effort and inconsistency? If we try to coordinate this work at the national level through entities such as the Library of Congress, the Program for Cooperative Cataloging (PCC), the American Library Association, and the Society of American Archivists, will it get bogged down or involve too few voices and perspectives? If the best way of proceeding is to strike a balance between locally generated ideas and national standards, how can we do that most effectively? Conversations within the PCC, occurring as we write this, make it apparent that this should not be an either/or strategy; a combination of local interventions and coordinated efforts toward changing the shared vocabularies used (inter)nationally are critical to making our library catalogs welcoming and useful to a diverse clientele.

How can we best reconcile the tensions between shared vocabularies and the need for localization? Are there technical solutions (alternative labels) that could be of use, for instance, to libraries wishing to display a term preferred by Indigenous peoples in their particular region instead of “Indians of North America”? Perhaps a technique at the level of the discovery layer could be used to display the common names of plants in a public library, while the academic library might prefer the established scientific names. There will always be nuances to describing specific, concrete collections that cannot be met by vocabularies designed for general, abstract ones.

Given the magnitude of the work required to review an entire catalog, we need strategies to focus our efforts. Where will our efforts be most effective in making cataloging more inclusive? The taskforce recommended taking cues from our public services colleagues and our users, perhaps creating a standard mechanism for providing feedback on language found in catalog records. The criteria outlined by the critical cataloging taskforce can then be used to “triage,” identifying the most pressing candidates for action in the form of change proposals or crafting local terminology.

Another question is how to deal with potential backlash as we introduce more inclusive terms into the catalog. The film “Change the Subject” documents the political brouhaha in Congress which stymied the efforts of the American Library Association and the Library of Congress to change the LCSH subject heading *Illegal aliens* to *Undocumented immigrants*. Are we bound to encounter more such resistance as we seek to change other offensive, denigrating, or misleading terms in the catalog? Libraries, archives, and our professional associations need to fortify ourselves with written policies which lay out the principles and reasons behind the changes we make and seek to have made. The FAQ[5] (frequently asked questions) we created, with assistance from our library communications department, can serve as a model to provide ready responses to potential challenges or complaints. We are proposing to make changes to our cataloging language at a time when the national political divide in the United States is deep and painful, and multiple stresses are heightening the tension. That is not a reason to abandon our mission, but it is a reason to have a plan.

Libraries collectively also need to plan to fund what is necessarily a long-term and iterative process if we intend to make inclusive description a reality. The work required—to identify problematic terms, research and identify preferred language, propose changes through the Library of Congress’s Subject Authority Cooperative Program (SACO) or the like, and to update bibliographic data accordingly—is not inexpensive. We cannot cease cataloging new acquisitions in order to take on remediation work; in fact, we may need to give more attention to newly cataloged materials as well. How can we best advocate for the value of this work? How can we cooperate further to share the benefits of what funding is available? Where can we find durable sources of funding? How can we protect this work from shifting political winds?

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[5] FAQ available at: https://confluence.cornell.edu/x/3yQkFw

Ethical Challenges

In working toward more inclusive cataloging, we catalogers need to recognize our own biases. This includes recognizing that we should not attempt to speak for marginalized communities, and we must not co-opt their voices. Who gets to represent these groups, and how do we prevent bias from creeping into the selection process itself? This raises the question of "literary warrant". Its bias in favor of published texts excludes the very sources where we might find the most appropriate language to describe materials about underrepresented communities.

In beginning the work of making the catalog more inclusive, we are clearly taking on a complex challenge. But if we believe in equity and respect for all, this work is essential.

References and Links

American Library Association/ Association for Library Collections and Technical Services/ Cataloging and Metadata Management Section, Subject Analysis Committee, "Report of the SAC Working Group on Alternatives to LCSH 'Illegal aliens'" (2020), https://alair.ala.org/bitstream/handle/11213/14582/SAC20-AC_report_SAC-Working-Group-on-Alternatives-to-LCSH-Illegal-aliens.pdf

Archives for Black Lives in Philadelphia: Anti-racist Description Resources (2019) https://archivesforblacklives.files.wordpress.com/2019/10/ardr_final.pdf

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Dartmouth Library, *Change the Subject* (2019), https://www.library.dartmouth.edu/digital/digital-collections/change-the-subject

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Sizeist subjects: an investigation into sizeism in Library of Congress Subject Headings

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Introduction

Sizeism is defined by Merriam-Webster as "discrimination or prejudice directed against people because of their size and especially because of their weight" (see also, e.g., Chrisler & Barney, 2017, 38). *Weightism* is defined as "bias, judgment, stigma, prejudice, and discrimination toward individuals based on their size, shape, or weight" (Arroyo & Anderson, 2013). The terms *underweight*, *normal weight*, *overweight*, and *obese* are legitimized in large part due to their establishment as weight statuses in the Body Mass Index (BMI) measurement system. In this paper, we critique the use of these terms by library and information science (LIS) professionals through an examination of sizeist and weightist bias in knowledge organization (KO) as reflected in the Library of Congress Subject Headings (LCSH; see, e.g., Smith, 2021). We put forth the charge that information professionals remain complicit in sizeist and weightist discrimination as long as the use of outdated and stigmatizing terminology is perpetuated in the tools (such as lists of subject headings) that are used for the assignment of index terms to documents in catalog records. Throughout this paper we will use the terms *sizeism* and *weightism* interchangeably, while acknowledging that they have slightly different connotations.

Examination of this topic is timely, as the field of LIS is very much participant in, and reinforcer of, structures that serve to continue to oppress marginalized populations (see, e.g., Berman, 1971). People inhabiting body sizes that are deemed abnormal, unhealthy, "overweight," and "obese" experience discrimination and oppression (see, e.g., Davis & Bowman, 2015; Saguy & Riley, 2005). Assignation of those categories using BMI is inherently flawed, as the BMI measurement does not take into account genetics, environment, mental health, or lifestyle behaviors, all of which factor into weight (Costin, 2007; Bacon et al., 2002). Such discrimination can serve to further compound oppression of people already experiencing social injustice due to sexism, ageism, racism, classism, transphobia, and other structural marginality.

While there has been LIS research conducted in a number of those areas (see, e.g., Adler et. al., 2017; Adler, 2017; Chou, Pho, & Roh, 2018) there has not yet been significant investigation into sizeist bias in the field. An examination of sizeist bias may similarly be undertaken from a humanistic perspective, making use of a social justice lens, as well as from the point of view of medicine, science, and sociology. Part of the work of researchers in many of these fields is to identify terminology that is outdated at best, offensive at worst, and such work is thus directly relevant to designers of controlled vocabularies for whom the goal of inclusivity is crucial.

In the humanities and social sciences, there have been changes over time in the vocabulary used around the issues of body size, weight, and health. A reclamation of the word "fat" has recently been underway, so that many people in the fat activism community refer to themselves and others as "fat" and not "overweight" (see, e.g., Gordon, 2020). About the term "overweight," they ask: Over what weight? And who determines that exact number? (Braziel, Evans & LeBesco, 2001). An interdisciplinary academic field, fat studies, has emerged that takes a critical approach to fatness as a phenomenon (see, e.g., Rothblum & Solovay, 2009; Cooper, 2010; Saguy & Riley, 2005). And "fatness" and "fat" as terms themselves are now widely used instead of "obesity" or "overweight." To the extent that these terms have effectively replaced the old in the published literature and in folksonomies, we suggest that now be the time for adjustments to be made to the Library of Congress Subject Headings, as detailed in the next section.

Problems and recommendations

Seven LCSH hierarchies relate at least partially to fat studies and/or sizeism (see also Angell & Price, 2012). These are (1) **Diseases**, (2) **Body weight**, (3) **Persons**, (4) **Discrimination**, (5) **Prejudices**, (6) **Social movements**, and (7) **Anthropometry**. We shall look at each of these hierarchies in turn. Existing subject headings are in bold; proposed subject headings are enclosed in quotation marks.

(1) **Diseases** is a heading occupying the following position in a broader hierarchy with **Science** at its head:

Science
.. **Life sciences**
.. .. **Biology**
.. .. .. **Human biology**
.. .. **Medicine**
.. .. **Diseases**

Narrower terms of **Diseases** include **Nutrition disorders** and **Metabolism--Disorders**. **Obesity** is found at the next level below each of these latter terms, and is the preferred heading for concepts including "Corpulence," "Fatness," and "Overweight" in LCSH. **Obesity in adolescence**, **Obesity in children**, **Obesity in men**, and **Obesity in women** also appear in this hierarchy.

Problem: Only some works about fatness are written from a medical perspective. Those that are not medical in orientation should not be assigned headings from the **Diseases** hierarchy. Simply being fat is not a disease nor a medical malady in and of itself. But there is currently no alternative to **Obesity** in LCSH.

Recommendation: **Obesity** should be reserved for works about fatness written from a scientific perspective using BMI, while "Fatness" should be established as a heading under **Body image**, for application to works written from nonscientific perspectives. Correspondingly, "Thinness" should also be established as a heading under **Body image**.

Body image is established with five broader terms: **Imagery (Psychology)**, **Mind and body**, **Person schemas**, **Personality**, and **Self-perception**. Its scope note is: "Here are entered works on the visual, mental, or memory image of one's own body or someone else's, and one's attitudes about that image."

Educational psychology / **Intellect** / **Psychology**
.. **Imagination**
.. .. **Imagery (Psychology)**
.. .. .. **Body image**

Brain / **Dualism** / **Philosophical anthropology**
.. **Mind and body**
.. .. **Body image**

Interpersonal relations / **Schemas (Psychology)** / **Self psychology**
.. **Mind and body**
.. .. **Body image**

Psychology
.. **Personality**
.. .. **Body image**

Psychology
.. **Cognition**
.. .. **Perception**
.. .. .. **Self-perception**

(2) **Body weight** is a broader term to **Leanness** and **Obesity**, among others, and may be found in four hierarchies:

Science
.. **Physical sciences**
.. .. **Physics**
.. .. .. **Weights and measures**
.. .. **Body weight**

Science
.. **Life sciences**
.. .. **Biology**
.. .. .. **Zoology**
.. .. **Anatomy, Comparative**
.. .. **Morphology**
.. .. **Morphology (Animals)**
.. .. **Body size**
.. .. **Body weight**

Anthropology
.. **Physical anthropology**
.. .. **Somatotypes**
.. .. .. **Body size**
.. .. **Body weight**

Anthropology
.. **Physical anthropology**
.. .. **Anthropometry**
.. .. .. **Body weight**

Problem: Again, only some works about fatness are written from the perspective of the physical or life sciences, or physical anthropology. Those that are not scientific or anthropological in orientation should not be assigned headings from these hierarchies. But there is currently no alternative to **Obesity** in LCSH.

Recommendation: Same as for cluster (1): “Fatness” and “Thinness” should be established as new headings under **Body image**.

(3) **Persons** is a broader term to **Overweight persons**, **Short people**, **Tall people**, and **Thin people**, among others. **Overweight persons** itself is a broader term to **Discrimination against overweight persons**, **Overweight children**, **Overweight gays**, **Overweight men**, **Overweight teenagers**, and **Overweight women**. **Overweight persons** is currently preferred to “Corpulent persons,” “Fat persons,” “Large persons,” “Obese persons,” and “Obesity--Patients.” **Discrimination against overweight persons** is currently preferred to “Anti-fat bias,” “Fat bias,” “Fat discrimination,” “Fat oppression,” “Obesity bias,” “Obesity discrimination,” “Oppression, Fat,” and “Overweight bias.” **Discrimination against overweight women** appears under **Overweight women**.

Problem: (a) **Overweight persons** is not analogous in formation to **Short people**, **Tall people**, and **Thin people**. (b) “Overweight” should not be used in preference to “fat” since it denormalizes (i.e., makes nonnormal) the state of being fat, and through its connection with the BMI pathologizes fatness with the subjectivity of *over*weight.

Recommendation: “Fat people” should be established as a replacement for **Overweight persons**; similarly “Discrimination against fat people,” “Discrimination against fat women,” “Fat men,” “Fat women,” etc., should all be established as replacements for existing headings. “Discrimination against thin people,” “Discrimination against thin women,” “Thin men,” “Thin women,” etc., should also be established.

(4) **Discrimination** (currently preferred to “Bias” in LCSH) appears in a hierarchy under **Social psychology**, whose four broader terms are **Human ecology**, **Psychology**, **Social groups**, and **Sociology**:

Human ecology / **Psychology** / **Social groups** / **Sociology**
.. **Social psychology**
.. .. **Interpersonal relations**
.. .. .. **Discrimination**

Narrower terms to **Discrimination** include **Age discrimination**, **Physical-appearance-based bias**, **Race discrimination**, and **Sex discrimination**. **Physical-appearance-based bias** is currently preferred to “Body-size bias,” “Size discrimination,” and “Sizeism.” **Discrimination against overweight persons** is a narrower term to **Physical-appearance-based bias**.

Problem: **Physical-appearance-based bias** is not a term that is commonly used in the literature.

Recommendation: “Size discrimination,” “Weight discrimination,” and other terms specific to discrimination against other particular aspects of physical appearance (for example, “looksism” is listed as a variant and is not necessarily tied to body shape, size, or weight) should be established as replacements for **Physical-appearance-based bias**.

(5) **Prejudices** (currently preferred to “Bias (Psychology)” in LCSH) appears in a hierarchy under **Psychology**, whose two broader terms are **Human biology** and **Philosophy**:

Human biology / **Philosophy**
.. **Psychology**
.. .. **Attitude (Psychology)**
.. .. .. **Prejudices**

Narrower terms to **Prejudices** include **Ageism**, **Classism**, **Racism**, and **Sexism**.

Problem: No heading has been established for “Sizeism” or “Weightism” on the same lines as **Racism**, **Sexism**, etc.

Recommendation: Both “Sizeism” and “Weightism” should be established as headings under **Prejudices**.

(6) **Social movements** has two broader terms, **Social history**, and **Social psychology**:

Social history / **Social psychology**
.. **Social movements**

Narrower terms to **Social movements** include **Fat-acceptance movement** (preferred to "Fat activism (Social movement)," "Fat liberation (Social movement)," "Fat power movement," and "Size acceptance (Social movement)").

Problem: **Fat-acceptance movement** is fully acceptable as a term for the social movement, but there is no term in LCSH that precisely denotes the (related but different) interdisciplinary academic field of fat studies.

Recommendation: "Fat studies" should be established as a heading under **Education--Curricula**, on the model of **Disability studies**, **Gay and lesbian studies**, and **Women's studies**.

(7) **Body mass index** appears in LCSH with broader term **Anthropometry**. The sources in the authority record note that, according to Answers.com, BMI "is a measurement of the relative percentages of fat and muscle mass in the human body, in which weight in kilograms is divided by height in meters and the result used as an index of obesity" (LCSH).

Problem: This is misleading and factually incorrect, as BMI does not measure relative percentages of fat and muscle mass. Neither, strictly speaking, is it used as an "index of obesity," but rather as an index of weight status.

Recommendation: The definition of BMI included in the authority record should be corrected to reflect the factors being measured as only height and weight.

Conclusions

There is a strong movement imploring information professionals to examine and reckon with systemic oppressive structures within the field. The importance of the intersectionality of sizeism, racism, sexism, ableism, and other structural marginality cannot be overstated (see, e.g., Crenshaw, 1991). Sizeist and weightist oppression specifically, as manifested in KO and LCSH, is a problem. There are steps which can be taken to rectify this problem. One place to start is with the recommendations for changes in the seven hierarchies laid out in the previous section.

Furthermore, there are other steps which can be taken in LIS in the effort to begin dismantling weightist and sizeist discrimination. (1) Professionals employed by knowledge institutions must be trained in multicultural competency and sensitivity in order to mitigate discrimination on the basis of body size and prejudice against fatness. (2) Such prejudice pervades not only the intellectual spaces represented by catalogs and subject heading lists, but also the physical spaces in knowledge institutions. An area for further LIS research is that of sizeist oppression as expressed in the construction and design of library buildings, for example, and how they perpetuate environments where patrons and employees face "difficulties navigating physical spaces" and "fitting into chairs and seats" (Davis & Bowman, 2015, 276).

Both intellectual and physical spaces contain barriers to the effective access to knowledge, which we as information professionals are responsible for providing. Information professionals remain complicit in sizeist discrimination as long as we use outdated terminology in our tools for assigning index terms to documents in catalog records. Enacting changes based on the recommendations put forth in this paper would be a preliminary step in dismantling sizeist oppression.

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The ethics of describing images: representing racial identities in photographic collections

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"The pictures do not change, but we look at them through the favorable or unfavorable prevailing public opinion."

(Frederick Douglass, "Lecture on Pictures," 1861)

In a lecture on the social and moral power of images, the African American abolitionist and orator Frederick Douglass encapsulated in one line the complexity of the interpretive act: the images don't change, but how people interpret them does, and this is a function of societal influences that change over time.[1] How humans perceive images has been the subject of many scientific studies since Douglass' time, and the consensus confirms the two truths that he already knew and used to his advantage: not just that visual perceptions are malleable social constructs, but also that images are potent carriers of meaning.[2]

In 21st century cultural heritage institutions, these two truths meet and intertwine with increased energy. First, people are more drawn to the power of visual culture than ever, and cultural heritage repositories are seeing rising percentages of visual formats. Second, after more than a century of prejudice and racism during which institutions and researchers alike tended to devalue and underrepresent the history of people of color in favor of attention to white history, researchers and their allies are now doubly energized to uncover materials illuminating the lives of African Americans and other marginalized groups. They are increasingly interested in seeking out historic images of people of color, which offer rich visual details into social histories, but are more difficult to find – and sometimes more challenging to describe – than paper records.

The ability to connect users with what they seek relies heavily on good description - subject headings, tags, narrative, and structured metadata – created by catalogers and other information professionals; furthermore, inclusive, equitable description is crucial in bringing to light under-represented histories. This article will attempt to describe one institution's efforts to analyze and reshape its descriptive practices as part of its commitment to connect researchers with previously under-described materials, with a focus on photographic collections, and will suggest practices that may be helpful to others on the same path. The author acknowledges and indeed hopes that the list of questions provoked by this essay is longer than the list of sure answers.

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[1] Douglass gave this lecture on photography and society in December, 1861 in Boston. It has a number of variant titles; Douglass originally titled it "Lecture on Pictures." The Library of Congress has published a manuscript copy available online: https://www.loc.gov/resource/mfd.22004/?st=gallery [Accessed 05/02/2021]. Douglass sat for many portraits, as did his fellow activist, Sojourner Truth; they both distributed these carefully managed images as part of their strategy in the fight for civil rights for enslaved and free people of color. See also Henry Louis Gates' marvelous article, (2015) "Frederick Douglass's Camera Obscura: Representing the Antislave 'Clothed and in Their Own Form.'" *Critical Inquiry* 42:1, 31-60 (https://www.journals.uchicago.edu/doi/10.1086/682995)

[2] There are many studies on racial bias and visual perception. A few to start with: Blair, Irene V., C. M. Judd, M. S. Sadler, and C. Jenkins (2002), "The Role of Afrocentric Features in Person Perception: Judging by Features and Categories." *Journal of Personality and Social Psychology* 83 (1): 5–25. Maddox, Keith B. (2004), "Perspectives on Racial Phenotypicality Bias." *Personality and Social Psychology Review* 8 (4): 383–401. Todorov, Alexander, Chris P. Said, Andrew D. Engell, and Nikolaas N. Oosterhof. 2008. "Understanding Evaluation of Faces on Social Dimensions." *Trends in Cognitive Sciences* 12 (12): 455–60.

Good descriptions of photographic materials fill in as much basic context as possible: who created them, when and where, their explicit visual content, as well as possible implicit functions or meanings - their "aboutness" (it must be noted here that the need to record as much contextual information as possible exists in a tensioned, shifting balance between available institutional resources – time, funding, and space – and the need to get users to within striking distance of the information they are seeking).[3]

When describing photographic works, archivists and others who create the metadata are confronted with two main challenges specific to images. First, unlike textual works, photographs often come with little or no explanatory context. In the professional world, many photographers choose not to title their works or identify locations or the people appearing in them. In the case of personal collections, as most of us can relate from looking through family photos, individuals and locations may not be identified, dates are absent, captions may be lacking. Over time, human memory fails, or the documentation that existed is lost from its object.

Second, when viewing images, people react much more quickly and present stronger responses (many of them unconscious), than when reading a text.[4] Physical features, expressions, dress, posture, and other traits prompt viewers to form instant, deep-seated, and often divergent judgements about the person in the photograph.[5] This is the power of the image – and especially of the interpretive act – that Frederick Douglass understood so well.

Add to this the fact that of course photographs also can be accompanied by text-based information contributed by photographers, editors, and collectors – titles, captions, keywords, and artists' statements; this information must also be considered image metadata and must be preserved as an integral part of the image object – and may carry with it its own human-generated biases and assumptions.

The challenge of overcoming biased reactions belongs not only to researchers and other end-users: archivists are in no way immune from this process and may consciously or unconsciously introduce bias in their descriptions of historical materials. Given this common challenge, how do we go about choosing ways in which to describe race in images – or for that matter, any personal identities such as ethnicity, gender, and sexual identity? Who decides what constitutes a "problematic" term? How do we avoid the pitfalls of previous generations' descriptive practices? One activity is to analyze the language of past descriptions and recognize patterns of description that result in inequitable, judgmental, or incomplete description.

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[3] For an excellent guide to describing photos and photo collections, see: Zinkham, Helena (2006), "Description and cataloging", in M. L. Ritzenthaler & D. Vogt-O'Connor (Eds.) *Photographs: Archival care and management.* Chicago: Society of American Archivists: 164-206.

[4] The science of visual processing is clear: humans recognize images thousands of times faster and retain the memory much longer than for text. Mary C. Potter et al., "Detecting meaning in RSVP at 13 ms per picture." *Attention Perception & Psychophysics* 76 (2), 2014: 270-279. https://www.academia.edu/5618048/Detecting_Meaning_at_13_ms_per_picture [Accessed February 10, 2021]

[5] Again, one can choose from many studies that investigate how people generate social inferences from images of others. See: Todorov, Alexander, Chris P. Said, Andrew D. Engell, and Nikolaas N. Oosterhof. (2008). "Understanding Evaluation of Faces on Social Dimensions." *Trends in Cognitive Sciences* 12 (12): 455–460. https://oxford.universitypressscholarship.com/view/10.1093/acprof:oso/9780195316872.001.0001/acprof-9780195316872-chapter-4

Ethical missteps in description can be summarized as three behaviors to be aware of:

- Making assumptions about the identity or character of a person or persons;
- Perpetuating structural racism and inequity by consciously or unconsciously using the same language and terms;
- Erasing or suppressing identities and voices by not referring to them when they are present.

Correcting these patterns of behavior means facing history in its completeness and presenting sometimes uncomfortable truths to the public eye. For example, if an image clearly conveys a stereotype or is clearly meant as propaganda, then the description can and must state this underlying functional meaning.

At the David M. Rubenstein Rare Book & Manuscript Library at Duke University, the Technical Services Department has long been committed to inclusive descriptive practices, but recently its staff has undertaken a more formalized effort outlined in a newly released "Guiding Principles for Description."[6] As part of this work, the staff are reviewing thousands of catalog records and collection guides (inventories or finding aids) for collections which contain outdated, incomplete, or offensive description, particularly in race-related materials. Some of this work is termed "reparative," addressing harmful past practices and rectifying them: in some cases, the staff are changing or adding subject terms and editing descriptions; in other cases, they are inserting contextual notes regarding offensive but historically accurate terms and names, rather than erasing them.[7]

This work of creating more inclusive descriptions extends to the photo archivist and other staff who work with photographs. We have targeted image collections containing photographs of African Americans and other people of color, reviewed their descriptions, and modified them as needed to call attention to the presence (or absence) of identities who previously might have been misidentified, overlooked, or suppressed. What follows are examples of photograph collections which received this retroactive work.

An early digitization project at the David M. Rubenstein Rare Book & Manuscript Library made visible to the public a compelling set of early 20th century portraits taken by Michael Francis Blake, one of Charleston, South Carolina's first African American studio photographers.[8] The digitized collection can be viewed here: https://repository.duke.edu/dc/blake. The Blake collection is an example of a collection that came with little item-level contextual information – because of the lack of captions, just 36 individuals out of the 118 photographs have been identified.

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[6] https://blogs.library.duke.edu/rubenstein/2020/09/14/now-live-guiding-principles-for-description/ [Accessed January 2, 2021]

[7] It may be interesting to note here the commonalities between the discussion over whether to eliminate or keep offensive language in archives and the debate over what to do with statues of U.S. Confederate soldiers and officers.

In the original collection-level overview, the 118 original photographs of men, women, and children were described at the group level as representing African Americans. However, as seen in the illustrations above, there are also portraits of people who are racially ambiguous, and in fact, at the item-level, these images were not tagged as "African American." Thus, 104 portraits out of the 118 are actually tagged as "African American." The reviewing archivist changed the collection-level narrative descriptions in the catalog record and online collection guide to read "The *majority* of the subjects *appear* to be African American" [italics added]. To support keyword and subject searches, the reviewing archivist also added the Library of Congress subject heading (LSCSH) "Racially mixed people" in the catalog record and added natural language narrative in the collection and series-level abstracts in the collection guides, indicating the presence of multiracial people in the photographs.

The choice of terminology is critical. While one goal is to provide standard subject terms found in controlled vocabularies and shared amongst international bibliographic databases, another goal is to include keywords in more widely accessible natural language, while also maintaining ethical standards of respectful language and non-pejorative terms. Following the guidance gleaned from many workshops on the best practices for equitable, inclusive description, the Rubenstein Library staff have agreed to use a set of controlled vocabularies for terms describing personal identities, relying on mainstream authority records (LCSH, TGM, AAT, NACO), while borrowing from other, more recently generated vocabularies for terms and concepts not yet accepted into the mainstream. A list of suggested mainstream and alternate vocabularies follows this article. Closely following additions and proposals for new subject headings is also important. Recently, the Library of Congress was forced by the U.S. House of Representatives to keep the heading "Illegal aliens," for which alternative, less negative terms had been proposed; the Rubenstein Library decided to adopt the term also chosen by other institutions, "Undocumented immigrants."[9]

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[8] Michael Francis Blake, a graduate of Avery Normal Institute, was one of Charleston, South Carolina's first African American studio photographers. He was born in 1879 on Johns Island, S.C., and moved to Charleston with his family around 1900. He began to work professionally as a photographer in 1912, setting up a studio downtown as well as photographing in outdoor locations. Blake died in Charleston in 1934 at age 55.

[9] For an overview of the conflicted events related to one subject heading, see the blog post, "Controversies in the Library of Congress Subject Headings (LCSH): the Case of Illegal Aliens." (2020), Librarianship Studies and Information Technology blog site, April 13, 2020 (https://www.librarianshipstudies.com/2020/04/controversies-in-library-of-congress.html [Accessed March 12, 2021]). It also includes a link to the documentary about the struggle over changing pejorative subject terms, "Change the Subject," produced by Dartmouth College student activists.

When working with collections lacking accurate data in the form of names, titles, and so on, choosing aggregate-level terms for race and other identities seems the best course, leaving the detective work of individual identity to others. It is also very time-consuming to change item-level tags in legacy digital collections. If one has the resources, and the collection is small, this kind of detailed work may be possible. In the case of the Michael Blake portrait collection, there are some intriguing single portraits. One Charleston, South Carolina family appears to be of Asian descent, but any contextual information has been lost. There is a woman who could pass as white, but considering that Blake seems to have had only people of color as clients, she may have identified as African American. Another family which appears in multiple portraits goes by the name "Rodrigues." Although due to lack of information or time constraints it is not always possible to investigate further, in the case of the latter family the archivist was able to easily find this family through an Ancestry.com search, and found that "Rodrigues" spelled with an "s" is commonly a Portuguese name. The family had a Scottish ancestor (apparently there was a significant population of Portuguese Jews in Scotland) who emigrated to South Carolina from the Caribbean. The Rodrigues family was classified in the late 19th century as "mulatto," and by the 1940s as "negro," an excellent historical example of the social malleability of racial identity.

Other image collections in the Rubenstein Library have undergone similar retrospective editing to account for racial identities and to call out under-represented groups. A similar portrait collection targeted for a review is the Hugh Mangum photographs collection, which contains turn of the 20th century images of people who were originally tagged as African American but who may be of other ancestry. Some of these images appear below. This collection's glass plates were also digitized and published and can be viewed at https://repository.duke.edu/dc/hmp. The item-level photograph metadata in the digital collection has not been altered, but again, to support keyword and subject searches, the reviewing archivist has added the LSCSH "Racially mixed people" to collection and series-level descriptions, and has added natural language keywords in the collection overview and abstract to indicate the presence of multiracial individuals.

The Frank Espada collection offers an example of assigning descriptive metadata when a community self-identifies as a single ethnicity but may include multi-racial individuals. The photographer Frank Espada was of Puerto Rican heritage, and spent a considerable part of his career documenting the Puerto Rican diaspora. In this case, the archivist has respected the community's ethnic identity as Puerto Rican (established by the photographer) but has added language in the collection overview and series-level description, as well as subject headings, indicating that individuals of racially mixed heritage may be present in the photographs.

Finally, one of the more unusual examples of self-determined identity is found in the series "Wesorts" in the Henry Horenstein photographs collection. The name was coined by a Maryland (U.S.) community whose inhabitants are almost all tri-racial (Black, Native American, and white); the single word "Wesorts" is how they commonly refer to themselves, as in "*We sorts* of people." The photographer documenting this community used their term as a mark of respect; the cataloger also chose to add contextual mainstream subject terms to reflect the presence of multi-racial people.

Another challenging ethical issue is whether or not to keep original descriptors now considered to be outdated or pejorative. What if a photographer had chosen the term "mulatto" to describe a person? What can a cataloger do with outright offensive descriptions that sometimes appear in titles or captions? Even if they are biased or offensive, keeping original descriptions and terminologies makes it possible for researchers and others to study past patterns of racism as they were originally presented to audiences. For images, racist elements and stereotypes can be transmitted through the visual content, but may not be specifically called out in the original title or caption. To mitigate either the presence of racist language or visually offensive subjects, one solution is to add the subject term "Stereotypes (Social psychology)" (LCSH) or "Ethnic stereotypes" as a facet (TGM).[10] Other strategies to call attention to potentially offensive language are to include a general alert in the collection inventory, and in the case of some graphic imagery, to attach warning labels to manuscript boxes

[10] The scope note for the TGM term reads: "Images that depict stereotypical traits of people classed according to shared racial, national, tribal, religious, linguistic, or cultural background… Also index under name of ethnic group."

Conclusion

These examples of how archivists at Duke University's Rubenstein Library have initiated retroactive cataloging serve as a glimpse into the challenging work of re-examining our catalogs and our descriptive practices for all materials, whether visual or textual, and creating an inclusive space for all histories and voices in our collections. It will keep us occupied for a long period of time – a time in which we can reflect on what it means to be human. We are made to tell stories, as flawed as they are, and in telling these stories we can also come to grips with painful national, regional, and local past histories.

As Frederick Douglass looked out on his mostly white Bostonian audience in December 1861, he left them with this thought: "…the great cheapness and universality of pictures must exert a powerful, though silent, influence upon the ideas and sentiment of present and future generations." If archivists and librarians desire to connect researchers and other users with long-hidden or newly acquired images of people of color in our collections, and if we desire to "influence the ideas and sentiment of present and future generations" of students, researchers, and members of our own professions, then we must move these collections into the light of public opinion. At the same time, we must be aware of our own assumptions and biases when we create the language that describes them, so that we no longer contribute to the systemic prejudices of the past, and respectfully prepare the way for new conversations about race.

GUIDELINES FOR DESCRIPTION OF RACE AND OTHER IDENTITIES IN IMAGES

1. Whenever possible, keep the artist's own captions and titles, and let them serve as the main descriptive elements; supplement or contextualize where needed.
2. Provide explanatory text for language that contains racist, dated, or offensive language. Point out propaganda when obvious, but be careful not to editorialize.
3. When there is no information at all, start with a place name and time period. Avoid guessing at identities; limit descriptive terms to "men," "women," "people," "adults," and "children," if it is accurate to do so.
4. When identities are ambiguous, use nationalities when possible, for example "Cubans," rather than try to assign racial identities, particularly in communities with high racial and ethnic diversity.
5. Rather than attempting to identify race or other identities in individual photographs with no contextual information, note the possible presence of identities at the collection level description.
6. Whenever possible, use terms that individuals or communities use to describe themselves. Recognize that people use different terms in different contexts, and study possible terms before using them.
7. Always clearly state the source for titles, captions, and other descriptive metadata, at multiple levels of description.

Appendix A

David M. Rubenstein Rare Book & Manuscript Library
Duke University, Durham, N.C. (USA)
Technical Service Department
“Guiding Principles for Description” (Summer 2020)

The Rubenstein Library Technical Services Department acknowledges the historical role of libraries and archives, including our own institution, in amplifying the voices of those with political, social, and economic power, while omitting and erasing the voices of the oppressed. We have developed these Guiding Principles for Description as the first step in our ongoing commitment to respond to this injustice.

1. We will use inclusive and accessible language when describing the people represented by or documented in our materials. We commit to continually educate ourselves on evolving language and practices of inclusivity and accessibility.
2. We will prioritize facts and accuracy, and resist editorializing, valorizing, or euphemistic narratives or phrases in our description. This includes a commitment to revisit and revise our past description.
3. When describing our collections, we will purposefully seek and document the presence and activities of marginalized communities and voices.
4. We welcome and will seek to incorporate input and feedback on our descriptive choices from the communities and people represented by and in our materials.
5. We will be transparent about the origin of our description, and our role in adding or replacing description. We will also commit to increased transparency about our own institution’s past descriptive practices.
6. We will advocate for and celebrate library description, and the essential labor and expertise of the library practitioners who create and maintain that description, as crucial for any ongoing preservation of, access to, and research within library collections.

Appendix B

GLOSSARIES, THESAURI, AND STYLE GUIDES FOR INCLUSIVE CATALOGING AND METADATA PRACTICES

Anti-Racist Description Resources

Created by the Archives for Black Lives in Philadelphia (October 2020)
https://archivesforblacklives.files.wordpress.com/2019/10/ardr_final.pdf

Art & Architecture Thesaurus® Online – Getty Research Institute

https://www.getty.edu/research/tools/vocabularies/aat/
When creating authority records for creators, the A&AT uses the "Nationalities" facet rather than racial identity, although they do use the term African American under "Nationalities," for example, when referring to African American artists' names.

Homosaurus

https://homosaurus.org/
Linked data vocabulary of LGBTQ terms that supports improved access to LGBTQ resources within cultural institutions. Designed to serve as a companion to broad subject term vocabularies.

Library of Congress Authorities and Controlled Vocabularies (LCSH and other authority databases)

https://authorities.loc.gov/ (The LC's main subject, genre, title, and name authority search interface)
https://www.loc.gov/librarians/controlled-vocabularies/ (Includes subjects, rare book and manuscript terms, and the Thesaurus for Graphic Materials)
https://www.loc.gov/aba/publications/FreeLCDGT/freelcdgt.html (Demographic Group Terms)

Diversity Style Guide

https://www.diversitystyleguide.com/
https://www.diversitystyleguide.com/topic-glossaries/raceethnicity-glossary/
From the "About" page: "The Diversity Style Guide is a resource to help journalists and other media professionals cover a complex, multicultural world with accuracy, authority and sensitivity. The guide includes terms and phrases related to race/ethnicity; religion; sexual orientation; gender identity; age and generation; drugs and alcohol; and physical, mental and cognitive disabilities."

Racial Equity Tools - Glossary

https://www.racialequitytools.org/glossary
From home page: "Racial Equity Tools is designed to support individuals and groups working to achieve racial equity. It offers tools, research, tips, curricula, and ideas for people who want to increase their understanding and to help those working for racial justice at every level – in systems, organizations, communities, and the culture at large. We curate resources that use language and analysis reflecting an understanding of systemic racism, power, and privilege and are accessible on-line and free to users."

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The Homosaurus

Brian M. Watson, Chloe Noland, Amber Billey[1]

Over the past two decades, the literature of the cultural heritage fields has witnessed a remarkable conversation reconsidering the ethics of basic practices and policies common throughout GLAMS (Galleries, Libraries, Archives, Museums, and Special Collections). Among these, the principals underlying cataloging and classification have inspired the most discussion. As GLAMS grapple with realizing that "documentation media are not neutral forms," and that their legacy data has "data legacies" that continue to affect, effect, and "haunt" present day practices, many have promised or undertaken reparative (re)description work.[2]

One area of the catalog in dire need of remediation work are access points describing queer subjects. Queer is used here as an umbrella term to refer to subjects with Marginalized Orientations, Relationships, Gender Identities And/or those who are Intersex (MORGAI). This is inclusive of LGBTQIA2S+ (Lesbian, Gay, Bisexual, Transgender, Intersex, Queer, Asexual, Two-Spirit, and more) individuals and communities, but recognizes that these terms are multifaceted, overlapping, and purposefully resistant of definition—queer, in other words.

In undertaking redescription work, the Homosaurus linked data vocabulary provides a critical and supplementary thesaurus for use alongside the Library of Congress Subject Headings (LCSH; first published 1898) and/or other vocabularies to better capture the experiences and variety of queer lives, material, and experiences.[3]

In what follows, we will offer 1) a brief overview of literature concerning queer subjects, 2) a history of the Homosaurus, 3) an explanation of the technical backend, and 4) a review of the ways that the Homosaurus has been described or used in the current literature.

Literature

The literature concerning efforts to develop inclusive and malleable, dynamic vocabularies for LGBTQ materials reveals an active and radical history. Led in large part by ALA's Task Force on Gay Liberation, formed in 1971, this group of information professionals focused on improving bibliographic classification and subject headings for LGBTQ materials that had previously been indexed under headings such as "Sexual perversions," or categories such as "Social pathologies," which shelved LGBTQ materials beside books on pedophilia and other sex crimes. Prior to the task force's intervention, LC catalogers often "relied on the definitions in psychiatric literature to determine the literary warrant of subjects related to sexual variance while ignoring and neglecting audiences and voices from other disciplines."[4] This spoke to an outdated and dangerous practice of determining literary warrant through exclusive and singular measures of judgement.

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[1] Along with K. J. Rawson, Marika Cifor, Clair Kronk, Walter "Cat" Walker, Jack van der Wel, Jay L. Colbert and Steven Anderson; the Board of the Homosaurus International LGBTQ Linked Data Vocabulary. http://homosaurus.org/

[2] Hannah Turner, *Cataloguing Culture: Legacies of Colonialism in Museum Documentation* (Vancouver, BC: UBC Press, 2020), Introduction.

[3] Iva T. Stone, "The LCSH Century: A Brief History of the Library of Congress Subject Headings, and Introduction to the Centennial Essays," *Cataloging & Classification Quarterly* 29, no. 1–2 (2000): 2, https://doi.org/10/drkk24.

[4] Adler, "'Let's Not Homosexualize the Library Stacks': Liberating Gays in the Library Catalog," *Journal of the History of Sexuality* 24, no. 3 (September 2015): 491, https://doi.org/10/gfwsh3.

Pioneering radical librarian Sanford Berman contributed many proposals to LC during the 70's and 80's, publishing treatises on prejudices and pejoratives exemplified in the structure and verbiage of LCSH terms. Calling attention to the power of language to "underpin often malicious stereotypes, to de-humanize the subjects, transforming them into unsavory or at least worthless objects," Berman initiated workflow procedures for proposals of new terms which culminated in the current established practices, as seen through organizations like the Program for Cooperative Cataloging (PCC) in the United States.[5]

Despite these leaps in progress, much conjecture over the ambiguity and context of preferred terminology has been almost endlessly debated by scholars and information professionals, resulting in disagreement over the "right" way to describe these queer subjects and groups. One such example of this can be given in the argument for universality over minoritization; or its opposite, contextualization and preference for minoritized terms over the more broad, ambiguous ones. Following the belief that using umbrella terms such as the LC heading "Gays" to apply to all materials effectively erased lesbians from the discussion, scholars such as Ellen Greenblatt favored the use of distinguishing terminology for distinct identities. Greenblatt noted that:

> "… gay as an umbrella term referring to women as well as men is no longer reflective of current usage, as indicated by the number of gay- and lesbian-oriented groups that have consciously changed their names to incorporate both terms."[6]

Alternatively, activist Barbara Gittings vehemently supported the use of umbrella terms such as "Gays" to apply to queer subjects as a whole, believing that narrower terms, such as "Gay men" and "Gay women" should be used to distinguish accounts exclusively. Gittings further insisted that "the name change from Gay Task Force to Gay and Lesbian Task Force was a mistake, because the term 'gay' was inclusive and provided language for a unified front."[7] Similarly, Guimarães et al. conducted a study examining local terms used by the LGBTQ community of Cariri, Brazil, from 2006 to 2013, finding that the power derived from this community by naming themselves was both an act of continued survival, a way to share cultural information in a private, coded mechanism, and a way to reconfigure the meaning of their shared spaces, speech, and collective identity.[8]

Serving as both a solution to these levels of ambiguity and to the de-structured content of tagging and cultural folksonomies, the development of authorized thesauri have been a tool used by librarians and scholars to contextualize their collections in a way that enriches them outside the expense of universal classification schemes and subject headings. Specialized thesauri support internal information organization, but they can also, as Donna J. Drucker points out, "be powerful tools for challenging and remaking information hierarchies and the social hierarchies embedded within them."[9] Drucker's argument could extend into the current moment: continued collaborations between users and GLAMS professionals are necessary for confronting and helping to remedy injustices (racial, sexual, gender) embedded in broader informational, social, and political systems—which is something the Homosaurus aims to support.

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[5] Sanford Berman, *Prejudices and Antipathies: A Tract on the LC Subject Heads Concerning People*, 1971, 5 Emphasis in original.

[6] Quoted in Ben Christensen, "Minoritization vs. Universalization: Lesbianism and Male Homosexuality in LCSH and LCC," *Knowledge Organization* 35, no. 4 (2008): 230, https://doi.org/10/ggcjs6.

[7] Adler, "'Let's Not Homosexualize the Library Stacks,'" 497.

[8] José Augusto Chaves Guimarães et al., "Knowledge Organization and the Power to Name: LGBTQ Terminology and the Polyhedron of Empowerment," *NASKO* 6 (2017): 63.

[9] Donna J. Drucker, "How Subjects Matter: The Kinsey Institute's Sexual Nomenclature: A Thesaurus (1976)." *Information & Culture: A Journal of History* 52, no. 2 (2017): 207–28, https://doi.org/10.7560/IC52204

Homosaurus

History[10]

The Homosaurus International LGBTQ linked data vocabulary (or HomoIT for short—the vocabulary's MARC code[11]), is freely available on the internet at http://homosaurus.org. Despite its current modern form, the vocabulary has deep historical roots: it is based on the internal thesaurus of Netherland's International Homo/ Lesbian Information Centre & Archives (IHLIA). Two separate institutions—the Homodok research library at the University of Amsterdam and the Anna Blaman Huis of Friesland—pooled resources for LGBTQ+ history to form IHLIA, thereby creating one of the most extensive queer-specific collections in the world.[12] Upon their union, the newly-formed IHLIA (now called IHLIA LGBT Heritage) discovered a need to describe their combined collection, but found that there were little to no applicable subject terms. The resulting project, *Queer Thesaurus: An International Thesaurus of Gay and Lesbian Index Terms* (1997) was edited by Ko van Staalduinen, Henny Brandhorst, and Anja Jansma. From 2013 to 2015 Jack van der Wel and Ellen Greenblatt revised, edited, and transformed the vocabulary into linked data, adding hundreds of terms in the process.[13]

The current board was established by Jack van der Wel and K.J. Rawson in 2016. Rawson was drawn to the Homosaurus when he encountered the 2013 version in seeking a controlled vocabulary for the Digital Transgender Archive, an online repository for trans-related historical materials.[14] Beginning in 2016, the board has met monthly to add, delete, revise, and discuss queer nomenclature. In May of 2019, the second version of HomoIT was released after significant revisions, mostly involving the removal of non-queer-specific terms and hierarchies. Since version two, the vocabulary is now updated biannually, usually in June and December, the joke being that Stonewall and Christmas are the two queer High Holy Days (followed closely by Halloween).

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[10] Earlier versions of parts this section were published in Brian M. Watson, "Homosaurus and Digital Transgender Archive," *SAA Reviews Portal*, June 17, 2019, http://reviews.americanarchivist.org.

[11] Network Development and MARC Standards Office, "Subject Heading and Term Source Codes: Source Codes for Vocabularies, Rules, and Schemes" (Library of Congress, November 20, 2020), https://www.loc.gov/standards/sourcelist/subject.html.

[12] Staalduinen, Ko van, and Henny Brandhorst. 1997. *A queer thesaurus: an international thesaurus of gay and lesbian index terms*. Amsterdam: Homodok.

[13] Jack van der Wel, "IHLIA - Making Information on LGBTIQ Issues in the Past and the Present Accessible and Visible," in *Serving LGBTIQ Library and Archives Users. Essays on Outreach, Service, Collections and Access*, ed. Ellen Greenblatt (Jefferson, North Carolina: McFarland & Company, Inc., Publishers, 2011), 158–61.

[14] Watson, "Homosaurus and Digital Transgender Archive."

Technical Discussion

The Homosaurus' platform was originally based on Opaque Namespace, a linked data service currently developed by Oregon State University Libraries and the University of Oregon Libraries.[15] Via the open source Controlled Vocabulary Manager, a Ruby on Rails application connected to Blazegraph, Opaque Namespace provides access to authority data via persistent URIs for use as predicates and objects in RDF statements.[16] Steven Anderson, a developer on the Homosaurus team, rebased the Homosaurus codebase to a three-part backend using Solr to display records, Postgres to store data and preservation metadata, and Blazegraph for querying.

One project undertaken by the Homosaurus team has been the direct mapping of Homosaurus terms to Library of Congress Subject Headings. As Homosaurus uses the Simple Knowledge Organization System (SKOS)—an ontology compatible with and similar to ISO 25964-1 thesauri—mappings from HomoIT to LCSH are technically simple, if not always philosophically so. For example, the HomoIT term "jealousy" (http://homosaurus.org/v2/jealousy) was mapped to LCSH's "Jealousy" (http://id.loc.gov/authorities/subjects/sh85069852) as an "External Exact Match," indicating that the board believes the concepts to be exactly the same. Very often, however, LCSH will not have an exact match, so the board must indicate that LCSH either has an "External Close Match" - for example, HomoIT's "Butches" could be a close match of LCSH's "Butch and femme (Lesbian culture)" - or, more often, no link is made between the two vocabularies at all.

Compared to traditional vocabularies like LCSH, the Homosaurus provides greater possibility to queer lives allowing cultural heritage institutions to better describe and provide access to queer subjects and material. The work of the vocabulary is ongoing and the board invites comments and engagements via our contact form at http://homosaurus.org/contact.

[15] https://opaquenamespace.org

[16] https://github.com/OregonDigital/ControlledVocabularyManager

Creation of Nepali subject headings with international standard : a project

Ms Bina Vaidya, Former Associate Librarian, Tribhuvan University Central Library
Ms Gita Thapa, Former President, Nepal Library Association

Abstract

Although the libraries and archives in Nepal are holding large number of books/documents in Nepali language and some Newari, Hindi and Sanskrit language books in their collections, those libraries are assigning the subject headings for them in their own way. This has brought no uniformity in assigning subject headings and also may not include the important subject access point included in the documents. There is no international standard subject heading list in Nepali, like assigning for other subjects from Library of congress Subject Heading List (LCSH), Sears List of subject Headings and many other standard subject heading lists. It is most essential tool to be created for the libraries in the country for the benefit to the users and the for libraries. So it is on the process to be created in our own effort. Fifty percent data (subjects) has been collected and Dewey Decimal classification DDC number has been assigned. It is scheduled to be completed in December 2022.

Keywords

Subject Headings/ Nepali Subject Headings/ subject card/ Libraries/Nepali language/ Hindi language/Newari language/ Sanskrit language/Publication/ Nepali Subject Heading List Book (NSHLB)

Introduction

Subject headings in information retrieval is a term that captures the essence of a document. Subject headings are used in a library catalog in tracing part of a catalog. In other word it can compare to a key that helps to display all reading materials of all subjects available in the libraries. Subject catalogs and call number with classification number and author number guides the readers to take out the library materials whatever he wanted without asking the library staff. Subject headings may include both English and Nepali subject headings depends upon the nature of the documents and books. For English language text books many international standard subject heading lists are available like Library of Congress Subject Headings (LCSH) published by Library of Congress, Washington, USA, Sears List of Subject Headings published by Barbara and H.W. Wilson company, Medical Subject Heading (MESH) published by National Library of Medicine, USA, Macro Thesaurus and so on. But for assigning Nepali subject there is no such subject heading list for the libraries of Nepal, although those libraries are holding large numbers of documents and books on Nepali language in their collections. Here we have focused on Nepali Subject headings only.

Nepali Subject Headings applied in the libraries of Nepal

In the Tribhuvan University Central Library (TUCL), every year budget is allocated to purchase books in Nepali language published in Nepal and in other places and add them to the collection. A few books in Newari language, Hindi language and Sanskrit language are also purchased. Publications on those languages are not available in large scale. Nepali Subject Headings are assigned to those books, so we have included the subject headings of those books too in our compilation. In TUCL special collection, a Nepal Collection is maintained where fifty percent of documents includes books in Nepali language. In total collection of the library approximately ten percent is Nepali language books. TUCL is the largest library in Nepal. This library is using Library of congress Subject Headings (LCSH) to assign to all those documents by translating them into Nepali. Other subject heading lists are not enough for the new subjects coming in the books. For specific subjects on Nepal, which are not known to other countries, not included in the standard subject heading lists, and cannot be omitted for providing complete information of the documents, the library is maintaining a Subject Authority File. In this file those specific subjects are collected and used. There are many other libraries in Nepal having books in Nepali language on different subjects but they are not assigning subject headings by using standard subject heading lists and there is no uniformity on the used subjects. In Nepal there are following types of libraries and archives: National Library, Public Libraries, Community Libraries, Medical Libraries, Government Libraries, Private Libraries, University libraries, Academic libraries, Foreign Libraries, Children Libraries, School Libraries, Research Libraries etc. and in the Archives up to now, National Archives and Asha Archives located in Kathmandu.

In this case we feel the need to create and produce a standard subject heading list and have started to collect and compile the Nepali subjects of the Nepali language books of all subjects used in the libraries of Nepal. In the collection we have found largest collection in Nepali literature. After collection and compilation other processing work will be continued and finally we will publish a **Nepali Subject Heading List Book (NSHLB)** which will bring uniformity of subjects in the libraries of Nepal.

All collected subject heading include Dewey Decimal Classification number after each subject. This makes it very easy for the libraries community to assign the subjects and class numbers together.

Unused important Nepali subject heading

There are many important subjects to be included that are not yet used by the libraries, such as on Nepal's diversity (language, culture, ethnic groups, art and sculpture, manuscripts, dresses and so on) as subject access to the point in the bibliographic record.

Brief description about our proposal

In Nepal there are many libraries where there are many Nepali language books included in their collection. But those libraries are using the subject headings of their own need without consulting standard subject heading list. As there is no such compiled subject heading list they are compelled to use them in this way. Those assigned subjects brought no uniformity in the application. At the same time we may loose important subjects of the documents and that will be a great loss to the users of Nepal and abroad. That compiled subject heading list will be updated time to time adding new subjects.

In this case if this subject heading list for Nepali, Hindi, Sanskrit language books/documents can be collected, compiled and published it will be a very useful technical tool for library management and can bring uniformity in this use of subject headings in their libraries.

Subject headings have been used as keywords or descriptors in the automated libraries OPAC (Online Public Access Catalog) of Nepal. The purpose of both is the same to retrieve information in the library materials through assigned subjects.

Objectives

Main objective of this compilation of Nepali subject heading is to collect and compile the subjects from the libraries of Nepal and publish vocabularies for representing the subjects access point of the Nepali, Hindi, Newari and Sanskrit books in the form of a book "Nepali Subject Heading List".

In future we are also planning for online publication of this Nepali Subject Heading List for users of Nepal and abroad.

Benefits to the libraries

- It can save the time of the librarians and cataloguers.
- Fist publication of library tool assigning subjects will be useful to all library communities.
- All libraries will follow the same subject heading list that brings uniformity among the libraries and archives.
- Networking of the libraries of Nepal will be possible.

Benefits to the users

- Subject headings / subject indexes remain the same both in subject cards and in catalogue systems and in data entries in OPAC system libraries.
- Those subjects compiled in the subjects help the users to retrieve the information included in the documents without losing important subject access point.
- Under the subject cards the information of the document like author, title, publishers addresses and call number are provided and that guides the full information of which the users wanted to know to read and issue the documents.
- The call number with classification number and author identity will help users to go directly to the stack where their materials have been shelved. Similarly in OPAC system keywords given in the data will include the same information as given in the catalog card including call number.
- Online accessibility of Nepali subject headings will be useful to all users.

Resources

Up to now all the resources like human resources, economic resources, transport, other expenditure are doing by authors themselves. We are expecting the resources if possible.

Subject heading compilation procedure

The compilation of the Nepali subject headings list will start from the libraries where the collection of the Nepali subject headings are more and recorded properly. After the collection of subject headings or data those will be arranged alphabetically and will be prepared for final checking by the subject expert and Nepali language experts.

All collected subject headings include Dewey Decimal Classification (DDC) notations after subjects for easy processing of the library materials to the library communities in Nepal.

As far as possible we will follow the pattern of Library of Congress for Subject Heading and latest edition of DDC for assigning classification numbers.

Present status of the project

Data collected: We have completed collecting subject heading from the libraries: Tribhuvan University Central Library, Madan Purskar Pustakalaya library, Keshar Library, Nursing Library, Ayurveda Library.
Up to now, we have collected five thousands Nepali subjects from those libraries.

Data to be collected: There are many other libraries which have to be covered for the process. In the first phase we will cover the libraries existing in the Kathmandu valley. Then in the second phase we will include other libraries outside Kathmandu valley. We are also collecting records from online too if those are available.

Process: We are planning to divide the records in two parts: applied subject headings in the libraries of Nepal and other subject headings directly extracted and translated from other standard subject heading list which are in English language.

Data Management: We are working to assign the Class Number from DDC and alphabetical arrangement.

Future plan

Printing and Distribution: After completed all the process (data collecting, editing) data will be edited by Nepali Language expert then it will be printed in 500 copies.

Advocacy: Seminar will be organized. We will distribute Nepali Subject Heading List Book (NSHLB) to the libraries in the country.

Online access: We will work to put the data online.

Conclusion

In this way we are in the process of creating or publishing Nepali Subject Heading with international standard. At present the project is running with our own effort and without any support from any national and international institutions. But we are exploring for financial support for this project.

Thanks,

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Book Review: Morrone, Melissa (2018, ed.) *Human operators: a critical oral history on technology in libraries and archives*. Sacramento: Library Juice Press. vii, 386 p. ISBN: 9781634000321 (paperback)

Reviewed by Karen F. Pierce, Cataloguing Librarian, Cardiff University

This book is exactly what it states in the title 'a critical oral history' and is predominantly US focussed. It is based on a series of interviews with 44 individuals held by the editor from July 2016 to March 2017. As an interesting aside one of the contributors is Michael Gorman (a former editor of C&I when he was based in the UK). I was interested in reviewing this book not only because as a cataloguer I work with technology, but because a number of years ago I wrote a small research paper about the impact of technology (predominantly RFID) on library staff.

As cataloguers or metadata specialists we are a subset of librarians who work with digital technologies on a day -to-day basis, so although this book isn't about practical cataloguing, or working with metadata, or a 'how to' approach to a classification scheme, it is informative about the way we (we as people and we as library staff) interact with technology.

The oral discussions are grouped together in six main chapter topics of *Learning, Connecting, Building, Collecting, Accessing* and *Being*, and then in themes within these chapters. So, in *Learning* we start off with reflections about experiences from the 90s before more contemporary topics are considered. Each chapter is introduced, which puts the discussions into context, but I did feel that the one thing possibly lacking was an editorial conclusion or reflection on each chapter. It may be that the editor thought the contributions stood strong as they were and needed no further comment.

Reading this book over the past year I could see many things reflected in colleagues I know – how when we were all told to work from home due to the pandemic, there was a large range of reactions and abilities to cope with technology or lack of it. Within our library services, and even our 'technical services' department, this ranged from PC or laptop at home, minimal problem transiting – right down to those who had no IT, no Wi-Fi, no smart phone. People who might be relatively ok in the workplace where there are plenty of others around to help when the slightest technical problem arises, were suddenly at home with none of that department or community back up.

Learning

"There are still lots of people who need to be taught the difference between a left and right click." John Helling (p. 25)

This was the first main chapter in the book and encompassed a broad spectrum of what 'learning' could be considered as within the library spectrum. From basic IT training delivered at public libraries, to courses on offer at library school, personal CPD and inhouse staff sessions, to recommendations for blogs and Twitter accounts to follow. One of the issues discussed was the digital divide and how certain people were being excluded. This extended into the ability to take on learning whilst working, and how privileges of time and money made a huge difference. There were also concerns about the lag between new technology and people (including librarians) learning how to not only use it, but also there being people who could teach it. Library schools came up for some criticism with the lack of teaching of technical subjects for a long while (including but certainly not limited to cataloguing/metadata) but it was also highlighted that many people wanted to steer clear of the technical topics. Digital literacy in librarians needed to be encouraged – as well as in their patrons. However, this was changing and there was hope that new graduates would have a better grasp of the technical side of librarianship.

There were also tales of some fantastic classes, programmes, and training that had been organised by many of the participants, and I did like this suggestion made by Jessa Lingel:

"*Susan Sontag had a really interesting idea in one of her journals, that later in life there should be second round of college, where people get to pursue a new line of interest or education. It'd be interesting to think about how we could have a program that gets people who've been in their field for a while genuinely excited about a new round of education or training*." Jessa Lingel (p. 26)

It can be difficult to keep up with everything that is new in your field whilst carrying on the day job, and it would be nice to have time to do so. The chapter ended with the contributors being asked what technology was the most useful to them and whose work they followed (blog, Twitter, colleagues etc.) and who they found to be influential. There was quite a variety of recommendations of people and some books that could be useful to follow up on. Interestingly the most useful technology was often fairly basic, even including paper notebooks alongside computers.

Connecting

This chapter seemed very pertinent for 2020/2021, when we have been faced with lockdown, not being in our libraries or offices, or able to talk face-to-face with our colleagues. Basic email seemed a favourite along with newer 'connecting' technologies like Slack.

A topic raised within this chapter was one of 'accessibility' – and the range of meanings that term can encompass, who we think might have accessibility issues and the compliance we might be looking at. One of the contributors, Stephanie Irvin, was pushing the idea of 'universal design' and expressed the following view:

"*..that's the great thing about making things accessible for everyone – sometimes you end up making them friendly for people without disabilities, and you don't even realize. So it helps everyone*." (p. 124)

With so many people now working from home or having to home-school children due to the pandemic, issues of accessibility – to devices, websites, online services – are even more at the forefront than previously. This led on to discussions about the digital divide, a topic which was raised by Tracie D. Hall, Executive Director of ALA at the CILIP Reimagined Conference 2020 in her keynote speech. During the Covid 19 crisis in 2020 there had been further eroding of funding for public and school libraries in the US and she highlighted the correlation between digital inequality and those communities being decimated by the pandemic.

As mentioned earlier in this review Library/Cataloguing staff have also experienced a 'digital divide' to a certain extent during the pandemic. We are used to working in libraries and offices where we have a certain level of connectivity to be able to do our job. Working from home is very different and staff have a wide range of connectivity issues. In 2019 when Labour proposed to provide free broadband across the UK as part of their election campaign the prime minister attacked it as a 'crazed communist scheme'.[1] What a difference it might have made to people within the last 12 months if this idea had indeed been put into practice. This section of the book, although based on interviews 4 or 5 years ago, seemed even more pertinent than when the opinions were initially expressed.

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[1] Labour's free broadband plan fires up the election battle | Politics | The Guardian

Building

The *Building* chapter looked at free and open-source software as well as makerspaces and digital media labs. One of the drawbacks for open-source software that was expressed was that you need to have staff who know how to use it and troubleshoot problems. The dilemma of either paying for commercial software with back-up or paying for people to understand and be able to fix open-source software. It seems that it is less easy to argue for proper and consistent staffing.

With makerspaces a few people also emphasised that it was possible for these to be low-tech too, or that it was just as valuable to be looking at disassembling technology to understand how it works. People should really think about why they wanted makerspaces and what they actually wanted to do with them. Especially as most libraries or organisations don't how much (if any) money to throw at them.

Collecting

The Collecting section covered topics such as catalogues and discovery layers, eBooks, open access, repositories, oral history archives, audio visual collections, and large digital libraries (such as Google Books and the Hathi Trust) and was probably the most pertinent section of the book for cataloguers and metadata specialists.

It began by looking at LMS – catalogues and discovery layers. People saw the catalogue as one of the most important pieces of technology in the library, but there were also plenty of complaints about this technology and how we are often beholden to vendors who never seem to design exactly what we want. One of the keys to this seems to be money – libraries don't make money, we have limited funds, and therefore don't have the power to push for what we need. There is also a limited marketplace and smaller companies have been bought up or merged with larger corporations.

Michael Gorman offers several insightful comments on the state of library catalogues and how steps were made toward the idea of Universal Bibliographic Control but have been stymied along the way by the abolishing of cataloguing departments, lack of knowledge about information retrieval, and the public being happy with everything looking like a Google search.

There was a discussion about eBooks which included both positive and negative comments; this covered digital rights management and complex proprietary software. I think most academic libraries at the moment have a lot of anger and frustration over current e-book models, which is finally beginning to be reported outside of librarian circles.[2] So, the complaints and issues of five years ago are even more pressing now.

One contributor highlighted Open Library, a project of the Internet Archive (https://openlibrary.org/) which lends digitised copies of print books, or e-books, out. It appears to sit in a grey copyright area, as some books are still in copyright – but they are only lending one copy at a time, as if they were print.

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[2] 'Price gouging from Covid': student ebooks costing up to 500% more than in print | Higher education | The Guardian

Accessing

Following on from collecting the natural progression is to access. However, whilst this chapter does deal with physical accessibility, terminology and metadata problems it also raises issues to do with privacy and security and has a focus on Interference Archive (which comes up in discussions throughout the book).[3] This is a volunteer-run archive of social movements, and because of their nature they are better attuned than some institutions to the needs both of those accessing the archive and those who may be featured in it.

"*How do we talk about open access and wanting to find a way to strike the balance between making a findable digital record, and sort of respecting the fact that these materials were created at a time when people didn't know that there would be mass archiving and mass cataloguing of items? Another conversation is about the right to be forgotten and the 'do not digitize movement', which I know is really big in the world of creators of zines*." Hadassah Damien (p. 284)

Language issues were also raised. These included the language of materials held in collections in the US in proportion to the communities they served, and how the bias tends to be skewed. For example, one small study revealed that a typical collection would have about 5% of material in Spanish despite the Spanish speaking population being about 12% (p. 288). But it also included the bias of software and coding programs which had difficulties coping with non-English languages, even those still in the Latin alphabet.

"*With increasing automation there's the increasing risk of the unintentional whitewashing of inherent non-English cultural markers, like diacritics*." Elvia Arroyo-Ramirez (p. 285)

"*The bulk of responses we received from the digital curation and preservation community pointed to replacing or removing the accented characters with the use of scripts of tools that 'cleaned' or 'scrubbed' 'illegal' characters by removing them entirely or replacing them with underscores. After I read some those responses, I wondered, why do the diacritics of a file name have to be 'scrubbed' or 'cleaned' – these are words that people actually used – in order to be deemed 'validated'?"* Elvia Arroyo-Ramirez (p. 287)

Being

The section on 'being' began with the idea that technology isn't neutral, despite it often being described as such. Cecily Walker comments:

"…*technology is a tool that is used by people, and it's a tool that's created by people, and people are not neutral. It may not be malicious. It may not be intentional, but our biases creep into everything that we do."* (p. 305)

This chapter continued by looking into structural oppressions with people talking about racism, privacy, and safety, and the idea that perhaps 'libraries are not welcoming to all.'

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[3] https://interferencearchive.org/

The environmental impact of technology was also considered as well as the hidden costs. From technological hardware that damages easily to software that regularly updates - both resulting in the tech needing to be replaced on a frequent basis, either because it is broken or because it has become essentially obsolete. In addition, the realities of the 'cloud' were touched upon. Jessa Lingell notes that these environmental issues are underdiscussed:

"*The amount of energy our servers are using all of the time so that we can stream stuff and have access to entire libraries of content all of the time – there are real environmental consequences for that that are obscured when we talk about it as a 'cloud', as if it's up in the air rather than underground in servers that require massive amounts of energy and water to keep cool*." (p. 307)

Zachary Loeb highlighted a larger view of disparity in technology life cycles, and the importance of thinking about who the people mining the raw materials to create devices are, or those having to deal with the waste at the end of the life cycle of the device, in comparison to '… *the well-paid engineers working at the swanky Internet start-up campus…*' (p. 312)

I would highly recommend this book, if for no other reason than to start yourself thinking about the topics and issues raised that might not seem immediately pertinent to technology. Are you complicit in everyday racism? Have you considered accessibility issues in what you are working on? Is there inherent sexism in your department? Have you thought about the environmental impact? This book could be used as a tool to get discussions started (at work? In a book club?), and indeed it would be good to see these discussions and questions raised publicly within the UK (and other countries), as the book comes from a US standpoint. Not that I believe there are many differences between us, but it would be interesting to hear about the projects and positive steps that are taking place here. This book gave me a lot of food for thought on a variety of issues, and it was a great platform to hear a range of voices expressing their opinions.

This book is available from Library Juice Press: http://libraryjuicepress.com

Book Review: McLeish, Simon (2020, ed.) *Resource Discovery for the Twenty-First Century Library.* London: Facet. xxxii, 203 p. ISBN: 9781783301386.

Anne Welsh, Beginning Cataloguing

"A library's success stands or falls by the ease with which its users can swiftly find the information they need. Today's users expect a discovery solution that enables them to search and retrieve rapidly the most relevant information from any device, anywhere and anytime" (Borensztajn, Pesch and Lawrence, p. 63).

This is just one of several dramatic soundbites I could have chosen from this excellent collection of essays on the current state of the art of Discovery. I selected this one because expectation drips from every page of this volume – the expectation the authors believe their users have of their library services, and the expectations that the writers themselves have of the current and near-future technologies with which libraries are themselves equipped.

If you are a cataloguer whose motivation is to work through your institution's aching backlog but who wishes to understand the reasons behind many of the changes that have swept across our workflows, this is a great book for you. I've already cited Ed Fay's book chapter twice in recent training sessions. Firstly, its great summary of the formal structure of search because of technological limitations at the start of Anglo-American cataloguing:

"Historically, information seeking was an explicit undertaking, carried out in particular locations, using formal structured media, and employing formal and often mediated strategies – within a library or archive collection, using a catalogue, to carry out rule-based searches, perhaps with the assistance of a reference librarian or archivist" (Fay, p. 164).

Then the chapter's description of its modern corollary: "Informality of search strategy is driven by the increasing ubiquity of personal computing devices" (Fay, p. 164).

These are useful descriptions for beginning cataloguers to hear when they are trying to get to grips with why our data contains a mixture of description and access points (and why we've ended up prioritising the access points that we have). "It is a truth universally acknowledged," to extend Austen in a way she could never have imagined, that although cataloguing principles should have led the structure of our records, they were severely curtailed by the technologies at significant points of development (the index card or dictionary slip pre-computerization and the MARC fields available since the 1960s).

This book is full of really useful points of view. The reader's understanding of case studies from Singapore, Australia, Oxford, and Hull is scaffolded by contextual chapters that explore topics including '"Why Can't You Just Use Google?"' (McLeish, pp. 101-113), 'Exposing Collections and Resources Effectively' (Garibyan and McLeish, pp. 115-128), and 'A World of Curated Knowledge: Leveraging the Wider Semantic Web to Enhance Library Discovery' (Stahmer, pp. 147-160), which includes the significant battlecry: "We need to stop thinking of linked data as a stopgap framework designed to staunch the dilution of library work into the pool of the world wide web and see it as opening the door for libraries to capitalise on and add value to the ever-growing body of information available on the web" (Stahmer, p. 150).

I love that quotation, and before you @ me with assertions that many of us already do see the semantic web that way, the reason I love it is because it's a cry from someone at the forefront of GLAM linked data, encouraging later adopters to join in.

In fact, I'd say that's pretty much the spirit of this entire collection. Editor McLeish tells us in his afterword how much he enjoys working in resource discovery, and that joy permeates all of the chapters in this book. Even the futurology chapter has been reworked stylistically to be fun and whimsical. Horstmann, De Roure and McLeish are experts and advocates for the technological development of the field, but they don't take their predictions too seriously. They've seen how near-impossible it is to predict the future of Library Search and why should the wider field of Discovery be any easier? After all, it's been predicated so far on the leaps and bounds of essentially disruptive technologies.

As a rare books cataloguer, I was pleased to see the ESTC (*English Short Title Catalogue)* discussed as a "prototype for the future", demonstrating the ways in which far from ripping our beautiful MARC data apart, linked data can introduce valuable contextualizing information alongside the best bibliographic work (Fay, pp. 154-156). And as a career-long cataloguer and trainer of cataloguers, I was very pleased to read such a well-edited collection of thought-provoking essays. Simon McLeish's introduction should be compulsory reading for anyone new to our field, and the other essays will, I think, repay careful consideration by us all.

Note: all quotations are from the book under review, except the Jane Austen, which is, of course, the opening clause of *Pride and Prejudice*.

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