

Task Group on Gender Interim Report

October 2023

The Task Group on Gender (TGOG) has met ten times since its initial meeting was called in August 2022.

The TGOG inherited its work from the Ad Hoc Task Group on Gender in Name Authority Records, which produced the Revised Report on Recording Gender in Personal Name Authority Records in April of 2022. The primary focus of the TGOG during its first year in a new form has been to review the extensive documentation left by its predecessor group; to assess and further develop documents noted in draft form; and to continually monitor and assess planned programmatic changes and further potential developments that may be in scope for the group.

The new group began its work by meeting with the former group to contextualize the project and to determine the nature and priority of the goals of the group. Ultimately, it was decided that review of all of the previous group's documents would bring the group to a shared understanding and would then allow for implementation of recommendations with associated groups (liaisons from the Library of Congress and OCLC, among others, are present). Overall, interests of the group fall into five primary categories: (1) monitoring the programmatic removal of MARC Authority 375, (2) updating documentation to reflect conscientious practices in regards to naming and gendering, (3) addressing places where gender is captured aside from MARC Authority 375, (4) conceiving recommendations for general best practices in MARC-based cataloging and (5) beginning to assess gender beyond MARC Bibliographic and Authority data (for example, in Wikidata).

The TGOG and its predecessor group's work are also being documented in the forthcoming edited volume *Inclusive Cataloging: Philosophical Questions and Case Studies in Reparative Cataloging*, due to be published in 2024.

Monitoring for programmatic removal of 375

Early on, it was identified by the group that ensuring the follow-through of the previous group's recommendation would be an important priority. Updates were provided internally at all meetings by the Library of Congress and OCLC representatives within the group. Although the removal was scheduled to begin in September 2022 (with testing beginning June 2022), technical delays to ensure the quality of the change have impeded its progress. As of September 2023, removal of MARC Authority 375 has begun but has not concluded.

Updating documentation to reflect conscious practices in naming and gendering

Even without making further recommendations beyond the predecessor group, TGOG discovered upon assessment that several instances of unnecessary gendering or adjacent inclusion of MARC Authority 375 which warranted revision/removal.

One recommendation given was for revision of the documentation on the Library of Congress's MARC Format for Authority Data page, which used gendered language in its examples and explicitly stated: "When the author is the same name as the 1xx heading, one of the following may be used in the citation: His, Her, Author's (gender unknown), or Its (not a personal name)". Revised language was submitted to the Network Development & MARC Standards Office at the Library of Congress, which approved and implemented new language. The language now reads: "When the author is the same as the 1XX heading, one of the following may be used in the citation: "Author's" (personal name) or "Its" (not a personal name)." and examples that include gendered language have been removed.

Public documentation of the MARC Authority 663 field also warranted a few changes. First, removal of unnecessarily gendered language was recommended, and second, a differentiation between linked identities where one name is "real" (in cases of pseudonyms) versus an example where multiple non-pseudonymous names exist (which would be true in all non-pseudonymous cases) was made. This recommendation also went to the Network Development & MARC Standards Office at the Library of Congress, which has been recently approved.

The predecessor group began to draft a document with recommendations and considerations surrounding the topic of "deadnaming", i.e. use of a past name to refer to a person, often with pejorative and/or violent intent. The group has reviewed this document and is revising it to include guidance that covers all instances of name changes. The group also plans to phase out the use of the specific term "deadnaming" because the term is used/claimed on an individual basis, and the group would like to be as universal with its language as possible. (To be clear: the recommendation document, which is nearing completion, is still discussing this problematic practice, but with appropriate terms such as "name change" and "prior name".) Generally speaking, this point has highlighted a major challenge for the group: we must draft recommendations that will cover a variety of different situations without necessitating the invasion of the privacy of people included in the Name Authority File.

Addressing gender in MARC authority and bibliographic records outside MARC authority 375

The TGOG has had numerous discussions about impact that naming and gendering have on other MARC fields.

MARC Authority 663

The group was especially concerned about practices around "deadnaming" and name changes in the Complex See Also Reference - Name field. In addition to the documentation changes noted above, the group is discussing a recommendation which would provide guidance to, when possible, defer to the preferred privacy level of living persons. The group acknowledges that guidance for use will be necessary. Recommendations and guidance on this front are very early in the draft stage.

MARC Fields 385 and 386

The group has also also discussed the MARC bibliographic 385 and 386 fields. Whether or how gender information is recorded in these fields can range from confusing to dangerous. In other words, outing authors can lead to reinforcing stereotypes or put authors in danger of harassment or discrimination. A document including recommendations about these practices is currently in draft format, and is being led by OCLC liaison and representatives within the group who were able to provide aggregate information about current usage of these fields.

MARC Authority Fields 373, 374

In addition to the initial scope of the group's charge including occupation information (374), the group has also examined and discussed gendered terms that may appear in the associated groups (373) field, or even the field of activity (372). The group's initial intent was to provide a recommendation or guidance about the use of specific associated groups (e.g., Jesuits), which may out an individual even if their name would not. But ultimately, the group determined that by creating such a list, it would expose the genders associated with particular associations, professions, etc., which might not otherwise be known. Such knowledge could further uncover gender identity, thus causing more harm. The decision reflects several other areas where the consensus of the committee is to prefer privacy over any individual cataloging policy or recommendation.

This conversation has also generated an additional thread about the use of particular gendered terms in MARC Authority 100 \$c, such as "boy soprano", which is still early in discussion.

MARC Authority Field 670

Naturally, discussion of MARC 670 has occurred due to its direct relationship with MARC Authority 375 as well as MARC Authority 663. The group is in the early stages of drafting documentation on best-practices in creating 670s that prioritize the safety of trans individuals (and the general privacy of all individuals) without negating other best-practices for documenting source data. In particular, ways to honor the voiced privacy preferences of living individuals and methods to prevent "editing wars" within a record where harmful information is re-added after removal are of high priority to the group.

Conceiving recommendations for general best practices in MARC cataloging

Discussions within the group often surfaced adjacent issues which were determined to be out of scope either because they were not issues exclusive to the capture of gender information, they were identified by the group to be training or documentation issues rather than policy issues.

It is impossible for the group to do its due diligence in both discussion and action without acknowledging that the issues regarding naming and gendering of individuals and content are one small piece of a larger conversation about the ethical ramifications of capturing information (especially about living individuals) that is happening across the profession, and indeed in many different contexts in PCC alone.

Converswikiations surrounding the essential purpose of the authority record (i.e. its role as disambiguating agents versus encyclopedic entry) have occurred frequently. This line of thinking has proven useful internally for building consensus around particular paths of thought/action.

Considerations about an individual's right to privacy have led to the group's review of the Draft PCC Position Statement on Personal Data in Name Authority Records, and liaison will happen between this group and the upcoming Standing Committee on Standards' Task Group on Privacy in Name Authority Records.

Other considerations like those of the MARC bibliographic 385 and 386 fields could easily be applied in other important contexts as well (e.g., when could using a designation like "gay composers" become an act of outing). Thus, the group hopes that with its eventual publication they will be a tool for others' future recommendations.

The group also has documents from its predecessor group discussing the use of gendered demonyms. This has been discussed briefly within the group and is currently being monitored. The group's expectation is that more specialized discussion can occur after the resolution of broader issues that are already in conversation, e.g. the standardization of occupation terms to be as gender-neutral as possible. Recommendations by the predecessor group were also made for Library of Congress Group and Demographic Term proposals, but fortunately, upon reaching this topic of conversation, the committee discovered that the requested changes had already been made and accepted along a similar line of reasoning to that of the group.

Assessment of gender in non-MARC contexts

The final goal of the group is to discuss the use of gender in non-MARC metadata. Although discussion of this has been limited in the amount of time explicitly dedicated to it, it has come up in relation to other discussion topics in several contexts. The group has followed emerging developments surrounding the changing use (usually deprecation) of gendered information in other contexts, including the deprecation of gender information in ONIX and for the purposes of ISNI. The group has also tangentially begun discussions of linked data gender information in

relation to specific existing issues with gendered information in Name Authority Records. Specifically, the issue catalogers have discovered is that gender is being re-inserted inappropriately into authority records where it has been removed with a citation of Wikidata. Wikidata's own gender field will cite the Name Authority Record, even after its gendered information has been deleted (either manually by an individual cataloger, or eventually via programmatic removal of MARC Authority 375). Such conversations will continue when appropriate to another topic and with the forthcoming publication of many of the group's MARC-based recommendations, more time will be increasingly allotted to the consideration of non-MARC context.

Summary

The first year of activity for the Task Group on Gender has been primarily focused on building consensus within the group, reviewing leftover documentation from our predecessor group, and beginning to make minor recommendations and establish drafts for larger recommendations. In the coming year, the task group hopes to see the completion of the programmatic removal of the 375 field, continue with its recommendations and guidance for MARC fields outside MARC Authority 375, and shift its focus into assessment of non-MARC systems and associated recommendations.